

Business Retention Programs in North Texas

BY

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## Abstract

### *Research Purpose*

The purpose of this study is to describe the different characteristics of Business Retention and Expansion Visitation programs (BREVS) in North Texas. Using descriptive categories outlined in the conceptual framework table, characteristics of BREVS are conceptualized. The use of BREVS is aimed at capitalizing and expanding on current businesses within a community while sustaining economic growth.

### *Method*

This study uses structured interviews to evaluate the different characteristics of BREVS in North Texas. A phone interview was conducted with six BREV coordinators in the State of Texas. Descriptive statistics were used to analyze the results.

### *Findings*

North Texas Economic Development focuses a large amount of resources on Business and Retention Expansion Visitation programs. While they continue to utilize the survey method to reach a broad range of industries within their community, they no longer utilize an important aspect of BREVS, volunteers. However, BREVS continue to evolve and adapt in order to account for the unique makeup of each community they serve. Given the lack of resources and technological advances, BREVS programs in North Texas continue to be a major form of economic development.

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## Chapter 1

### **Introduction**

#### **Introduction**

Economic development is a unique term in that it embodies both the public and private sector while heavily relying on federal, state, and local governments, and ultimately, having a significant impact on our day-to-day lives. Economic development is defined as planning and implementing a set of activities or programs aimed at stimulating growth of an economy (Weaver 1986, 1). Although the definition is simple, it is much more difficult to define the theory behind economic development. This difficulty stems from unique characteristics that make up each municipality's economic culture. Each economy is different. Therefore, an economic development program that achieves success in one city cannot be generalized for other cities.

This struggle is multiplied by the ever-changing nature of the economy. For instance, like the United States, local communities experience a fluctuation in economic conditions. Second, we are beginning to see a shift in economic development and economic culture. No longer are communities fixated on landing large corporations or the 'big fish'. Instead, economic practitioners are focused on promoting job growth from within their community. This shift in economic development theory not only proves to be more cost effective, but net results indicate that this theory promotes greater job growth within communities. Finally, as cities compete for growth in a federal system, cities have to try and retain

employers because of the overall global economy Businesses can choose to leave the community.

More specifically, Texas claimed that almost all of economic development funding was provided by federal agencies (Weaver 1986, 37). Federal agencies included the Department of Housing and Urban Development as well as the Economic Development Administration. Nearly one-third of the twenty-four cities surveyed by Weaver stated they received assistance from both federal agencies (Weaver 1986, 36).

Economic development plays an important role in all sectors within a community. For example, a strong economic development culture promotes job growth, expands the local tax base, and provides local governments with extra revenue to promote community development. Both public and private sectors benefit from a strong economic development plan. However, both sectors of the economy are highly dependent on each other. In other words, both sides play an important role in sustaining economic growth.

Local governments continuously stress the importance of job growth. Job growth within a community is two-fold. First, a surplus of jobs lowers the unemployment rate within a community. A low unemployment rate means that there is an increase in production, wages, and consumption, three of which eventually find their way back to the local economy, thus stimulating economic growth. Second, a flourishing economy is a sign of sustained business growth that also attracts outside citizens to the community. Job creation and attracting citizens fulfills two of the most important goals in Texas economic development.

Benefits of economic development are also closely tied to the private sector. The reason for this is because local governments offer incentive packages to private companies. For example, many local governments provide big businesses with an economic incentive package that includes attractive financing and tax abatements (Weaver 1986, iii). However, further research indicates that businesses are more interested in the level and quality of public service offered by local governments. Specifically, Weaver 1986 (iii) indicates that businesses are interested in an array of public services. These public services include educational facilities (for business employees as well as school systems), police and fire protection, transportation, and vicinity to local infrastructure (Weaver 1986, 1).

Retaining and expanding local business guarantees job growth. Ultimately, job growth attracts more citizens to a community, which in return promotes community development. This 'economic cycle' benefits the public and private sector while sustaining a healthy economic development culture.

### **Economic Development in Texas**

Economic Development is important to cities for a variety of reasons. Cities rely on economic development when the economic environment is healthy and emphasize continuous growth while sustaining current conditions. In retrospect, cities that do not benefit from a healthy economic culture rely on economic development to provide a spark in economic growth. This 'spark' in growth can help stimulate the local economy, provide jobs, and increase government revenue for future economic development.

Texas cities rely heavily on economic development. With an ever-changing economy, Texas has experienced a number of different circumstances that have stressed the need for local economic development in Texas Cities (Weaver 1986, 1). One of these factors is a declining trend in federal grant funding for domestic programs along with a steady decline in the growth of the Texas economy over the years (Weaver 1986, 1). It is evident that Texas cities now view economic development as a major function of city government.

As we have witnessed a period of economic downfall, it is evident that the ideology behind economic development has changed. A shift in ideology has in part contributed to the apparent financial meltdown of the 21<sup>st</sup> century. Researchers continue to document an apparent change in Texas cities. Specifically, how economic development in Texas continues to grow and produce jobs in a time when resources are at an all time low. In a study done at The University of Texas in Arlington Institute of Urban Studies, 95% of local businesses stressed the importance of expanding existing business and industry (Hazlet 1985). Texas continuously utilizes Business Retention and Expansion programs, specifically Business Retention and Expansion Survey programs (BREVS).

In their 2007 Business Retention and Expansion Pilot program, The Texas Department of Agriculture defines BREVS as:

*“A comprehensive program that can be as far-reaching as an organization is able to manage effectively or as conservative as one outreach activity. BR&E programs include planning and implementing community-specific activities that promote interaction*



*with local businesses. TDA's Business Retention and Expansion program offers both one-on- one and group training to help organizations achieve their maximum degree of success. The activities of an aggressive BR&E program are limited only by the effort, imagination and resources of the community*

[\(<http://www.agr.state.tx.us>\)](http://www.agr.state.tx.us).

### **Business Retention and Expansion Visitation Programs (BREVS)**

Although various forms of business retention and expansion programs exist, this study focuses on Business Retention and Expansion Survey Programs (BREVS). BREVS are an aspect of economic development that became popular in the early 1980s. This form of economic development utilizes volunteers or a task force to gather information on existing businesses in the form of a survey. Once volunteers are trained, interviews with local businesses are conducted, data is gathered and analyzed, and plans are adopted based on information obtained through visitations.

Given the many challenges, local governments must try everything they can to retain businesses. Among many approaches, using BREVS is specifically linked to retaining local businesses. According to Lambe and Schweke (1990) in their article "Business Retention and Expansion: "Synergizing" Service Delivery", there are increasing incentives for implementation of BREVS. BREVS are a low-cost, high return strategy of economic development. On average, they contend that 76% of new jobs and capital investment can be contributed to BREVS (Lambe and Schweke

1990). Inversely, the public cost (unemployment compensation, welfare, and health care) of losing an existing business can negatively affect communities.

There are numerous reasons why communities use BREVS. Whether it's fixing a pot-hole in front of a business, adding street lights in a parking lot for security, or providing financial assistance for expansion, BREVS provide the foundation for uncovering these problems. BREVS open the doors of communication among public officials and private business owners that otherwise would be considered a barrier. BREVS also present the ability for businesses to signal concerns and appreciations to local business, to learn about roadblocks or pre-existing issues that discourage growth within the community, and through data collection provide a clear picture of how the business community can be assisted (Darger 2001).

BREV programs are common in the United States. According to a 1992 survey exploring BREVS in the United States, twenty-six states were involved in supporting local BREVS programs (Loveridge et. Al 1992, 2).

Comparing the amount of currently active BREVS in the United States is difficult, because BREVS have evolved drastically over the years and sometimes fall under the broad spectrum of economic development duties. Different organizations utilize different components of BREVS, while some organizations rely solely on staff to conduct Business Retention and Expansion programs that incorporate a version of BREVS as a day-to-day function of the organization. More specifically, researchers find it difficult to identify BREVS, as the term has become out dated and replaced as a normal function of economic development corporations.

While BREVS have great potential, there are a number of factors that influence their effectiveness. Understanding common pitfalls or problem areas for BREVS is an important aspect of understanding BREV characteristics.

### **Why Economic Development Corporations (EDC) use BREVS**

In this study, Economic Development Corporations is defined as a non-profit organization that is established for the purpose of monitoring and investing in different businesses and other resources to aid the development and growth of the economy (Weston 1970). As stated before, every community strives to achieve different goals, target industries, and community needs. First, it is important to understand what attracts EDC to utilize BREVS programs.

Illvento and Loveridge (2000) established a questionnaire that set out to answer what attracted EDC to BREVS programs. The questionnaire focused on the unique aspects of BREVS programs that are commonly emphasized in scholarly literature. These unique aspects are: focusing on existing businesses, providing a written report, and emphasizing responses to community needs.

The results show the importance of such components emphasized in BREVS programs (Illvento and Loveridge 2000). Illvento and Loveridge (2000) found that a combination of 'very important' and 'important' scored 70% or higher when measuring the importance of unique aspects. The study also indicated that very few EDC coordinators were not aware of the key components of BREVS programs.

It is important for EDC to recognize these key components. EDC coordinators felt the responsiveness that BREVS provide to local business needs was the most

appealing aspect of a BREVS program. This emphasizes the importance of utilizing key components that define BREVS programs.

### **Common Pitfalls**

Many BREVS suffer from many common pitfalls. They include unclearly defining short and long-term goals, not understanding economic base within a community, and a failure of creating clear lines of communication between multiple entities within BREVS programs (Moses 2002).

According to the literature, defining program goals is the first and most critical step of BREV programs. When dealing with areas that other programs have struggled with, it is essential that BREVS clearly define program goals within each phase of the program. Often, economic practitioners fail to clearly define the purpose of their strategy, thus lacking a solid foundation from the beginning stages. Not only must goals be clearly defined, but individuals must also understand community needs as well as being held accountable for providing a clear and sound definition outlining community goals. A key component of 'goal identification' is the use of community leaders or professional economic consultants (EDC). In order to clearly define short and long-term goals, it is important that head officials of BREVS programs discuss clear and realistic program objectives in order to avoid program failure.

Another common pitfall of BREVS is the inability to research and fully understand their economic base. Every form of economic development strategy implements some type of economic base analysis (Moses 1991). This is critical in

BREVS as it largely contributes to painting a clear and realistic picture of where the community currently stands, where improvements are needed, and the best path towards achieving economical enhancement (Moses 1991).

However, literature indicates that there are also other “common errors in economic base analysis that can doom” economic development strategies (Moses 1991, 57). Of the many errors suggested in the literature, one common error was contributed to a lack of communication and input between professional and community leaders. This inability to clearly communicate can often lead to inconclusive goals and reports, and failure to understand target industries (Moses 1991). Communication between all entities in BREVS is crucial because each organization provides input that is invaluable to the overall goals of economic development. Too often a lack of communication within an organization is responsible for poor tracking of ongoing efforts and excludes problem areas that should be addressed. This pitfall is of particular interest regarding BREVS as communication between public and private sector is a substantial component of the program. By utilizing the knowledge of leaders in local business within the community, BREVS ultimately will gain a greater understanding of strengths and weaknesses of the local business climate (Moses 1991).

Based on interviews with economic development practitioners, fewer BREVS exist than once they did. There is a limited amount of scholarly literature articles that discuss current BREVS programs in the United States. Although there are fewer articles on BREVS, the concept of BREVS still exist and presents numerous advantages in economic development. BREVS have evolved and now extend to

more organizations than they did many years ago. This evolution no longer utilizes volunteers as a main component. Instead, BREVS programs rely on technology (specifically economic development software) to reach more businesses and interpret data in a much smaller time frame.

### **Characteristics of Effective Programs**

The need for effective BREVS programs has increased with the fluctuation of our national economy. This trend has contributed to more businesses closing or relocating to communities that can provide better support and offer greater incentives (Canada 2003). Past experiences would lead cities competing for another business to replace businesses that choose to relocate. However, the competition for corporate partners is fierce and expensive (Canada 2003). Due to the simple fact that major corporations lack the necessary resources, there has been a decrease in new facilities built in the United States (Canada 2003).

More important, BREVS programs offer a unique connection between public practitioners and the private sector. Effective BREVS programs allow public practitioners to signal their concern and appreciation to local businesses, to educate themselves on current business trends and roadblocks within the business community, and to create and expand community capacity for responding to issues within the private sector (Darger 2001, 2).

Effective BREVS programs allow multiple opportunities for economic growth. Benefits from an effective BREVS program can help establish a healthy relationship between public officials and business leaders within the community. The benefits of

having a successful BREVS program is that public officials can reach out to business leaders, assist them with their growth and development, and create new jobs that will stimulate economic growth. Ultimately, BREVS can create jobs, expand the tax-base, and provide economic growth while limiting financial costs.

### **Research Purpose**

The purpose of this research is to describe the multiple aspects of Business Retention and Expansion Visitations programs (BREVS) in North Texas Cities. Public practitioners and private sector leaders must have a theoretical understanding of aspects that are essential to running a successful BREVS program. These factors benefit both sectors of local business climate while establishing economic growth within the community. This study is aimed at describing the different aspects of BREVS programs that are offered in North Texas cities.

## **Chapter 2**

### **Literature Review**

#### **Chapter Purpose**

This chapter provides an overview of the scholarly literature on Business Retention and Expansion Visitation Programs (BREVS). Specifically, this literature review focuses on the different facets of BREVS programs through the following descriptive categories: BREVS leadership and management, BREVS participants, and volunteer management. As many communities continue to deal with the economic crisis of the 21<sup>st</sup> century, it has become increasingly important to understand the benefit of BREVS and how they can contribute to economic development while they continue to develop communities. The descriptive categories can be found in the conceptual framework table located in the following chapter.

#### **Conceptual Framework**

Economic Development Corporations, community leaders, and local businesses understand that there are many different aspects that contribute to completing a successful BREVS program. Backed by scholarly literature and for the purpose of this study, BREVS leadership and management, BREVS participants, and volunteer management are used as descriptive categories. In order to describe how North Texas cities are utilizing different aspects of BREVS, a conceptual framework table is developed. Using a conceptual framework table provides direction on collecting and analyzing data that can help with the organizational foundation of the



paper (Shields and Tjalli 2006). The literature supports the conceptual framework presented in Table 2.1.

**Table 2.1: Conceptual Framework**

<b><u>Descriptive Categories</u></b>	<b><u>Sources</u></b>
<p><b>BREV Leadership and Management</b></p> <ul style="list-style-type: none"> <li>· Clear lines of communication</li> <li>· Use of strategic planning principles</li> <li>· Projects adopted vs. successful completion</li> </ul>	<p>(Williams 1976) (Morse and Ha 1995)            (Moses 1991) (Okubo 2009)(Loveridge &amp; Smith, 1992a)(Allanach &amp; Loveridge, 1998) (Darger 2001) (IIVento and Loveridge 2000)</p>
<p><b>BREV Participants</b></p> <ul style="list-style-type: none"> <li>· Economic Development Coordinators</li> <li>· Public Officials</li> <li>· Public-Private partnerships</li> </ul>	<p>(Ghere 1996)            (IIVento and Loveridge 2000)            (International Economic Development Council of Washington D.C. 2006)            (Kayden 2002)(McFarland and Seeger 2010)(Mullin 2002) (Stoker 1998)            (Walzer and York 1998)</p>
<p><b>Volunteer Management</b></p> <ul style="list-style-type: none"> <li>· Recruitment Diversity</li> <li>· Training Program</li> <li>· Volunteer Vs. Firm ratio</li> </ul>	<p>(Brudney &amp; Hager 2004) (Cothran 2006)            (Darger 2001) (Grossman and Furano 2002) (Ha and Morse 1995)(Laboa et al 1992) (Loveridge et al. 1991) (Loveridge and Morse 1998)(Texas Department of Agriculture: <a href="http://www.agr.state.tx.us">http://www.agr.state.tx.us</a>)</p>

## **BREV Leadership and Management**

BREV leaders must establish clear lines of communication, conduct strategic planning, and implement their program. For the purpose of this study the three most important characteristics of BREVS are outlined: clear lines of communication, strategic planning principles, and the number of projects adopted vs. successful completion of BREVS. BREVS professionals indicate that BREVS are more successful when characteristics are clearly defined and brought into focus, thus, helping with each phase of the program. The importance of focusing on different characteristics is because each phase brings a unique set of challenges to BREV programs. Whether these challenges are clear lines of communication, use of strategic planning principles, or program completion, they are all key characteristics that contribute to successful BREV programs.

### **Clear Lines of Communication**

Defining clear lines of communication can be difficult in any organization. The difficulty presented in economic development can too often lead to an unsuccessful program. This problem is further magnified when organizations work together across different sectors. However, by utilizing the knowledge possessed by local business leaders, economic development practitioners ultimately gain a greater understanding of the strength and weaknesses of a community's business climate.

According to Moses 1991 (58), coordination and support must exist within the different entities of an economic development program in order to achieve success. Too often, lines of communication are either not clearly defined, or they do not exist. Not only is it important to define lines of communication, but it is also important that those working within an organization know whom to contact with questions and suggestions, thus exemplifying that it is not only important for those to know where to go with their questions or suggestion, but that it is important for all of those involved in economic development programs to understand that they have a voice in the plan (Moses 1991, 58). Far too often economic development practitioners over-step the boundaries defined by their organization.

What many neglect to recognize is that lack of communication can hinder all phases of the BREVS program. This is evident when an agency implements a plan that is not heavily supported by staff, or the agency does not convey the overall reasoning behind the plan. The reason that defining clear lines of communication is key to a successful BREVS program is simple: there is a sense of moral within the organization and it is more likely that all aspects of the BREVS program will pull together in the development plan, achieve their goals and objectives, and increase the likelihood of achieving program completion (Moses 1991, 59).

Most public practitioners understand and follow their organizational chart. However, this can become complicated when dealing with BREVS programs. It is important that all individuals within the program communicate effectively, especially given the numerous amounts of needs and wants presented by local businesses. Effective communication will undoubtedly provide a more efficient, less

problematic program. Although examining this specific characteristic of BREVS may take a little more time and commitment before the program begins, the payoff during the BREV program will greatly benefit the entire BREVS process (Moses 1991, 59).

### **Strategic Planning Principles**

In order to ensure success in BREVS programs, coordinators should utilize the use of strategic planning. Strategic planning provides the foundation of a successful BREVS program by ensuring active participation among citizens and public and private officials.

Furthermore, literature on strategic planning principles outlines four main concepts. In a study by Morse and Ha (1995), examined the use of strategic planning principles and their utilization of BREVS in a four-state survey (Minnesota, Missouri, Nebraska, and Ohio). The four strategic planning principles used can be found in **Table 2.2** below.

**Table 2.2: Strategic Planning Principles**

1. A broad cross section of community leaders should be involved in collecting the data, analyzing the results, and developing a plan.
2. All final decisions on the plan should be made by community leaders rather than outside experts.
3. The planning committee should involve other citizens in the plan implementation.
4. Those developing the plans should work actively on the implementation phase.

Source: Ha, Inhyuck and George Morse, "How Successful Are BR&E Implementation Efforts? A Four -State Example." Staff Paper Series, P95-13, Dept. of Applied Economics, University of Minnesota, November 1995

Each principle embodies characteristics of BREVS that help throughout each phase; planning, development, and completion. It is important that BREVS use the first strategic principle and incorporate a broad cross section of community leaders in the program. By not restricting BREVS participants solely to elected officials and Economic Development Coordinators (EDC), BREVS gain the opportunity for diverse input, achieve a clearer understanding of economic conditions, and allow BREVS programs to incorporate parts of a community that would otherwise be discarded. Second, by leaving final program decisions up to community leaders, BREVS programs will focus strictly on expanding and retaining local businesses, as outside agendas will be eliminated. Citizen input is very important in not only economic development, but also in BREVS. Ultimately, citizens are the largest stakeholders in BREVS program. The use of strategic planning principles keeps citizens actively involved by providing them an opportunity to participate in different phases of BREVS program. Not only does this principle allow citizen input, but it also keeps BREVS programs accountable. Finally, BREVS must stress the importance of

program completion. Often, long-term goals can be difficult to fully accomplish. This is one major problem that BREVS face. In numerous studies, BREVS professionals have pointed out that BREVS programs appear to be relatively successful until it comes time to fully complete specific plans developed during the beginning stages of BREV (Morse and Ha 1995). Literature indicates that results vary extensively when it comes to program completion. Although vast amounts of literature are lacking on BREV program completion, practitioners agree that there is a specific degree of difficulty during the completion phase. **Table 2.3** represents the results of Morse and Has' (1995) four-state study and their use of strategic planning principles.

<b>Table 2.3: BR&amp;E Programs Using Strategic Planning Principles</b>	
<b>Principles/Characteristics</b>	<b>Percent of Programs</b>
Broad cross section of community leaders involved:	
At least 15 persons involved in firm visits	66%
At least 10 community leaders on TF*	66%
TF was "broad-based;" 4 groups with none greater than 50%	62%
Decisions Made by Local Leaders:	
At least 15 TF members developed recommendations	68%
TF selected the final priorities for strategic plan	84%

Other citizen involvement in Implementation:  TF held community meeting on results of plan	69%
TF actively Involved in Implementation:  At least 5 TF attended implementation meetings	52%
TF met at least quarterly to work on implementation	35%
TF had overall responsibility for implementation	6%
*TF = Local BR&E Task Force of Community Leaders	
Source: Ha, Inhyuck and George Morse, "How Successful Are BR&E Implementation Efforts? A Four -State Example." Staff Paper Series, P95-13, Dept. of Applied Economics, University of Minnesota, November 1995	

**Table 2.3** outlines the percentage of BREVS that followed the strategic planning principles suggested by the literature (Morse and Ha 1995). In a four-state study, the results indicate, “approximately two-thirds of BREVS surveyed involved programs that consisted of a broad cross section of community leaders” (Morse and Ha 1995, 3). A broad cross section was defined by using multiple characteristics. These characteristics are defined as: the number of people involved in firm visits, use of community leaders on the task force, and that the make-up of the task force from different facets of the community (Morse and Ha 1995). As **Table 2.3** suggests, 69% of citizens were actively involved with the implementation stage of BREVS, thus implying a more accountable program. Finally, the majority of participants surveyed concurred with what Morse and Ha suggested as



implementation being a major strategic principal. As indicated in their study, 84% of BREVS had community leaders actively working on BREV program's implementation (Morse and Ha 1995). The study by Morse and Ha reiterates the importance of strategic planning principles as a major component of BREV characteristics.

### **Plans Adopted Vs. Successful Implementation**

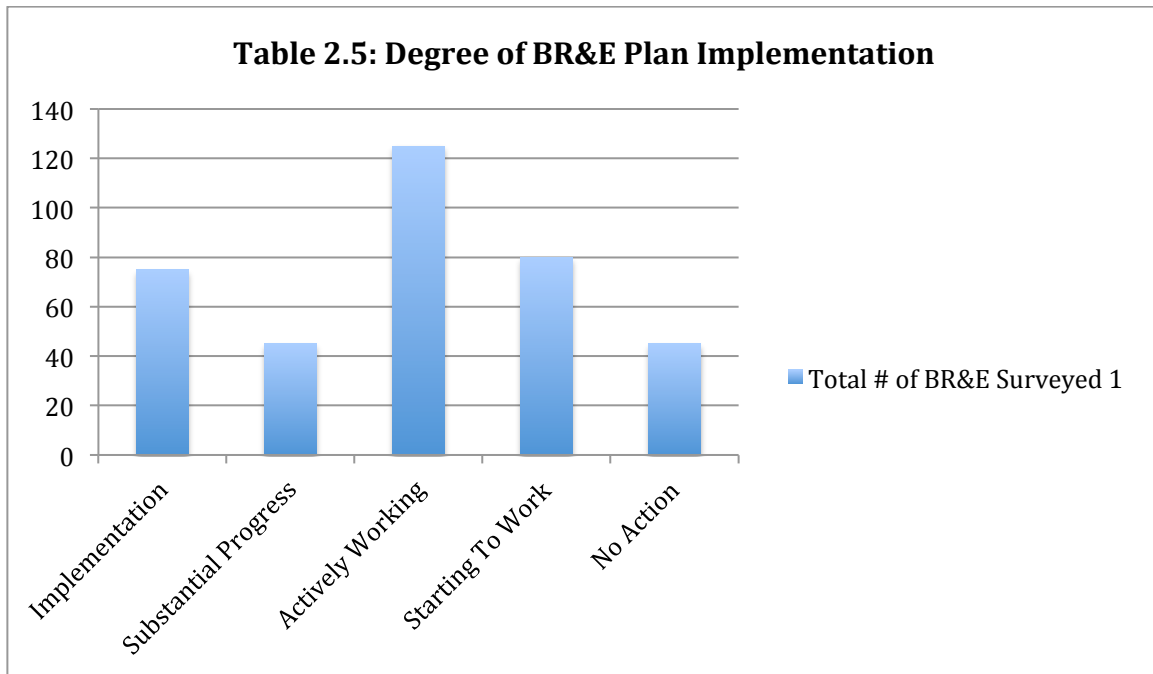
Another key characteristic for BREV programs is exemplifying project management. The literature suggests that too often BREVS either adopt too many projects or they do not utilize their program's potential capability. It is important for program coordinators to understand and manage BREVS programs with an understanding of their program capacity. BREVS capacity involves funding, volunteers, staff, time, and resources. Understanding project adoption using BREVS characteristics is important in how BREVS programs utilize their capability.

Revisiting the four-state study done by Morse and Ha (1995), they continued to examine different characteristics of BREV programs. Following the guidelines of the literature, they examined BREV completion and the number of plans adopted by BREVS. Plans are defined as "the reaction implemented to address a firm's primary concern or other opportunities" (Morse and Ha 1995, 2). **Table 2.4** indicates the number of plans adopted by programs during their four-state study.

<b>Table 2.4: Number of Plans Adopted by BR&amp;E Visitation Programs</b>	
Number of Plans Adopted	Percent of Programs
None	6.2%
1-3	15.3%
4-6	46.2%
7-9	29.2%
10 Plus	3.1%
Source: Ha, Inhyuck and George Morse, "How Successful Are BR&E Implementation Efforts? A Four -State Example." Staff Paper Series, P95-13, Dept. of Applied Economics, University of Minnesota, November 1995	

**Table 2.4** provides the opportunity to examine BREV programs and how many plans they tend to adopt. As this study indicates, 46.2 % of BREVS tend to adopt 4-6 different plans (Morse and Ha 1995). Only 6.2% BREV programs adopt zero plans while 3.1% adopt 10 or more plans. This table presents the percentage of programs offered vs. how many plans they adopt. The next table indicates the relationship between plans adopted vs. program completion of BREVS.

BREVS programs adopted an average of just under five plans (Morse and Ha 1995, 2). **Table 2.5** indicates the relationship between plans adopted vs. program implementation.



Source: Ha, Inhyuck and George Morse, "How Successful Are BR&E Implementation Efforts? A Four -State Example." Staff Paper Series, P95-13, Dept. of Applied Economics, University of Minnesota, November 1995

On average BREVS programs adopted just under five plans. Overall, Morse and Ha (1995) contend that 30% of the plans adopted in the BREVS surveyed had been completely implemented. They that another 35% of the plans were being actively pursued. Another 35% of the BREVS programs that responded indicated that implementation efforts were just starting (24% just starting and 11% had taken no action toward implementation). The majority of BREVS considered themselves “actively working” on program implementation.

The characteristics of BREVS leadership and management are essential in every phase of the program. They are essential because they help the transition from each phase, continue to carry out program goals, and follow through to ensure that programs are fully completed. Avoiding common pitfalls is important because

BREVS utilize research in economic development to successfully run their own programs within their community. Another key characteristic of BREVS is the use of strategic planning principles that offer guidelines, which programs can use to assist in completing a program successfully. Finally, by understanding project management, and following through to the completion stage, BREVS can better understand the fine line between successful plans adopted vs. program implementation.

### **BREV Participants**

BREV programs are aimed at gathering information throughout all sectors of a community by utilizing the participation of multiple organizations. Both the public and private sector, as well as partnership between the two, manage BREVS.

Scholarly literature indicates the importance of economic development coordinators, elected officials, and public-private partnerships in implementing a thorough and successful BREVS program.

Literature continuously describes the growth and evolution of economic development within the United States, with increasing attention given to urban areas (Walzer and York 1998). Economic development continues to grow although lacking a defined theoretical base (Mullin 2002). Literature concurs with this observation, stating “economic development is sometimes considered a profession without an underlying (academic) theoretical base” (Mullin 2002, 7).

In general, economic development uses numerous components to initiate and finalize their plans, assess their needs, and achieve their goals. Economic

development in some form will occur within the traditional and distinct roles and responsibilities undertaken by local governments and private developers (Kayden 2002). However, during this process many negative effects can occur. For instance, boundaries between entities can become blurred. This is a key problem with BREVS. BREVS strive to utilize different facets of the community to provide a clear picture prior to beginning BREVS programs. Given this particular instance, it is very important to understand not just volunteers (notably because they are the most visible component of BREVS) but BREVS program coordinators must then communicate clearly with all organizations involved in the BREVS program. Whether they are from Economic Development Corporations, public officials, or a combination of public-private partnerships, BREVS coordinators play a pivotal role in BREVS programs.

### **Economic Development Coordinators**

Economic Development Coordinators (EDC) play a vital role in BREVS programs. Coordinators are responsible for facilitating and overseeing the entire program. Their responsibilities include organizing program outcomes, establishing the task force, and managing follow through, ensuring program completion.

It is important to understand why EDC became involved with BREVS. This provides an opportunity to measure the starting point of EDC coordinators and their success in implementing BREVS programs. Ilvento and Loveridge (2000) described the different aspects of EDC coordinators and their introduction to BREVS programs. Of the 80 coordinators that responded to their survey, 77.5% claimed

that this was their first experience using a BREVS program (IIVento and Loveridge 2000). Second, coordinators stated that they found out about BREVS programs through state sponsors, colleagues, associations, or a presentation (IIVento and Loveridge 2000).

Diversity is important in any organization. Economic development is no exception. It is important that coordinators come from a combination of both the public and private sector. This allows them to grasp a greater understanding of economic principles. However, most EDC come from the non-profit sector. These include Chambers of Commerce, public officials (elected/mayor), other industrial development authorities (including Economic Development Corporations) utilities, and universities. More important, IIVento and Loveridge (2000) provide evidence that many coordinators are beginning to come from the private sector. In their survey, they found that local businesses (business owners) and banks are playing a dominant role as coordinators of BREVS programs (IIVento and Loveridge 2000). It is important from a researcher's point of view that coordinators come from diverse backgrounds. Private sector involvement will allow the collection and analysis of data that will further enrich research on successful BREVS and characteristics of BREVS program coordinators.

## **Public Officials**

Involvement of public officials is important in economic development. Public officials are held accountable to citizens' desires and community needs. Scholarly literature indicates that local elected officials have clear and specific roles to play in their cities' efforts to build a strong local economy. They make decisions every day that impact the future of communities. It is of utmost importance that public officials decisions and actions support particular community vision and do not work against political autonomy of existing efforts.

It is important that public officials understand and evaluate their community's needs. As indicated in the literature, knowing local economy strengths and weaknesses, understanding community economic development vision and goals, and acknowledging economic development stakeholders and partners, are three important components that public officials must adhere to in order to run a successful BREVS program.

In their article "The Role of Local Elected Officials in Economic Development", McFarland and Seeger (2010) outline the importance of knowing local economy strengths and weaknesses, understanding community economic development vision and goals, and acknowledging economic development stakeholders and partner.

The first component outlined by McFarland and Seeger is the importance of knowing local economic strength and weaknesses. The literature indicates the importance of this in regards to public officials as they have a strong understanding

of economic profile within a given community, which allows them to envision a realistic strategy for further economic development (McFarland and Seeger 2010).

Before implementing BREVS, public officials initially assess communities' economic strengths, using factors that are clearly defined by the literature. These factors include economic condition's (unemployment, wages, income), demographics, business climate, and quality of life (McFarland and Seeger 2010). The International Economic Development Council of Washington D.C. (2006) defines these factors as:

1. Economic Conditions – Unemployment, wages, and income
2. Demographic – Population size, growth, age, and education level
3. Business Climate – Community attitudes, workforce training, public and private infrastructure

Each of these factors provides an important road map for public officials that use in implementing BREVS programs.

The second factor public officials use in achieving a successful BREVS program is understanding development vision and goals. The literature indicates a two-fold importance of understanding economic vision and goals. First, public officials must weigh their options against many competitive priorities when using BREVS. Second, they must manage their time and attention to various stages of the BREVS to ensure proper and successful implementation. By having a clear economic vision and goals, public officials are more likely to provide a framework for strategically assessing and coordinating BREVS programs (McFarland and Seeger 2010).



## **Public-Private Partnerships**

Public-private partnerships (PPPs) have become standard practice in economic development (Mullin 2002). Literature contends that PPPs are the answer to economic growth and development problems facing states and local governments (Mullins 2002, 1). However, this is met with widespread skepticism when it comes to overlapping sectors. On some degree, experts caution the use of both sectors. They understand the delicate balance between public and private sectors, both of which can often operate on hidden agendas.

An important aspect of BREVS is the relationship they must develop with the private sector. BREVS programs depend on not only helping private industries, but also value their input on multiple levels. BREVS is a great opportunity not only to learn what BREVS can do for the private sector, but also to gain knowledge on how of improve throughout the community overall.

For the purpose of describing BREVS and how they utilize PPPs through their involvement in economic development, it is important to understand the key issues BREVS face when using PPPs. One important issue is what potential problems come from “private encroachment” into public affairs. This is often referred to as “governance”. Governance can be described as the actions, manner, or system of governing in which boundaries between both public and private sectors have become permeable (Stoker 1998). BREVS must pay particular attention to this aspect as they deal with the private sector throughout the entire program. Second, BREVS must clearly define the partnership between both sectors. This includes

partner selection (who will participate), the roles of each component of the partnership, and the grounds for accountability issues, as well as monitoring methods throughout the BREVS process (Mullins 2002).

Literature contends that from a governmental ethics perspective, issues associated with economic development appear to be both multifaceted and complex (Ghere 1996). As BREVS continue to assess private businesses and their needs within the community, they must keep in perspective that PPPs operate on a fine line. BREVS must be careful not to violate government ethics, while clearly defining both sectors' roles, and monitoring the activity between both components, while implementing BREVS.

### **Volunteer Management**

A main component of BREVS is the utilization of volunteers. Volunteers are important because they make up the most visible part of BREVS. Under the supervision of a taskforce manager, volunteers are responsible for a variety of tasks including soliciting information from multiple industries within a community by administering a standardized survey, by carrying out the survey method, and by collecting data. Other duties of volunteers include coordinating times and dates of visits, recording responses from local businesses, and presenting the data to the task force for analyzing. Literature continuously argues that volunteers are one of the most important aspects of BREVS. Volunteers play a vital role in the success of BREVS. The visitations made by volunteers in the BREVS program are the most visible component of the program. During these visits, a team of volunteers

interviews the CEO or business manager, typically using a ten-fifteen page survey instrument (Laboa et al 1992). BREVS use citizens along with the knowledge, guidance, and expertise of a local taskforce consisting of both public and private sector employees. The ultimate goal of these volunteers is improving overall long-term economic development.

Thus, recruiting and training the volunteers appropriately is an important aspect of BREV management. What approaches BREVs use to recruit, train, and manage volunteers is an important aspect of understanding BREV management.

The extent of the literature on volunteer management practices in the nonprofit sector is growing but lacking because many organizations do not emphasize the importance of retaining volunteers (Brudney and Hager 2004). Effective management can bring gains to volunteer productivity the same way scientific management has brought gains to commerce and industry (Brudney and Hager 2004). Paying attention is a key concept in this regard. Unless organizations pay attention to volunteer management, “they will not do a good job of recruiting, satisfying, retaining, and mobilizing volunteers for service” (Brudney and Hager 2004). Poor volunteer management practices also results “in more lost volunteers than people losing interest because of changing personal or family needs” (UPS Foundation 1998, 15). As a result, organizations will waste scarce resources recruiting and training replacement volunteers (Brudney and Hager 2004).

Volunteer management capacity is defined by scholarly literature as a function of both “staff support of volunteering and an adoption of administrative practices necessary for the management of volunteers” (Brudney and Hager 2004).

This is an important concept with BREVS. BREVS are structured where coordinators, top officials, and private sector leaders follow administrative practices in order to properly manage volunteers and program implementation. Management capacity plays an invaluable role in both the management practices in all nonprofit organizations, but also in Economic Development Corporations, and more specifically, BREVS. For the purpose of this study, three areas of management capacity that heavily influence BREVS are described: recruitment diversity, training programs, and volunteer vs. firm ratio

### **Recruitment Plan**

A recruitment plan is an essential element of an effective volunteer management strategy. A recruitment plan includes a strategy for proper screening of potential volunteers to ensure appropriate entry and placement (Grossman and Furano 2002).

The recruitment plan must pay particular attention to utilizing a diverse task force of community stakeholders that are capable of organizing, training, and implementing a successful BREVS. The task force is comprised of volunteers that are representatives from the business community (business owners), educational institutions, local government, and in some communities, Economic Development Corporations (Cothran 2006). It is essential that the taskforce exhibits community diversity. Cothran (2006) suggests these individuals are recruited because they are viewed throughout the community as “leaders” and play a predominant role in community life.

Task forces vary among different communities and programs. Members of a task force are dependent on a number of different factors, including community size and local preference (<http://www.agr.state.tx.us>). One strategy suggested by Morse and Loveridge (1997) is to utilize representation from five different groups. These groups include business leaders, development professionals, local government officials, education officials, and other community leaders (Loveridge and Morse 1997).

It is important for BREVS to incorporate different leaders from throughout the community. Incorporating numerous public and private officials from a diverse background ensures that the BREV program will take into account every aspect of the community. In a study by Lobao (et al. 1992), local BREVS programs were analyzed in an effort to measure their impact on economic development. The study indicated that on average, “local programs averaged twenty-four volunteer visitors, with two-thirds of them coming from the private sector” (Labao et al. 1992). Further studies indicated that, on average, development professionals, public sector officials, and educators accounted for 7-11% of volunteers participating in BREVS (Loveridge et al. 1991).

### **Training Programs**

Scholarly literature is unequivocal on formal training programs for BREVS. The most important component is the use of survey training. On a less formal end of the spectrum Cothran (2006) contends that training for volunteers must be well coordinated, and even draws a comparison to an, “Athletic team”. The next step,

after successfully recruiting the most capable task force, is training. The main goals of training are: what is the purpose of the visit, why are interviews being conducted, and strategically what techniques will lead to a successful BREVS (Cothran 2006). Last, Cothran (2006) contends that a successful BREVS should offer at minimum a three-hour training session.

On the other end of the spectrum, there is particular emphasis on the survey method. Loveridge and Morse (1998) contend that a typical survey-training program should consist of six components:

<b>Table 2.6: COMPONENTS OF SURVEY TRAINING PROGRAMS</b>
<ol style="list-style-type: none"> <li>1. An explanation of the purpose of the survey.</li> <li>2. An explanation of the role of the interview team.</li> <li>3. A detailed review of the survey instrument</li> <li>4. Assignment of the teams to businesses for the actual interview</li> <li>5. Training on interviewing and note-taking techniques</li> <li>6. A practice interview</li> </ol>
<p>Source: Smith, Thomas R., George W. Morse, and Linda M. Lobao. "Measuring Impacts of Business Retention and Expansion Visitation Programs." <i>Journal of the Community Development Society</i> 23.1 (1992): 124-33. Print.</p>

Other scholarly literature reinforces the idea of educating volunteers in the survey method since most are not “economic development professionals” (Lobao et al 1992).

## Volunteer Vs. Firm Ratio

BREVS rely on the proper use of volunteers. As mentioned before, volunteers are responsible for numerous tasks, such as collection of data, carrying out the survey method, and visiting local businesses. A very important aspect of volunteer management within BREVS is understanding and balancing number of volunteers vs. firms visited.

<b>Table 2.7: Person or Group Handling Local Problems by Immediate Employment Impacts</b>			
	Did the program have an immediate employment impact?		Whole Sample
	%Yes	%No	
Coordinator Alone	39	55	50
Consultant	13	14	13
Task Force and Coordinator	27	10	16
Task Force Only	21	19	20
Other	0	2	1

Source: Ha, Inhyuck and George Morse, "How Successful Are BR&E Implementation Efforts? A Four -State Example." Staff Paper Series, P95-13, Dept. of Applied Economics, University of Minnesota, November 1995

The number of businesses visited during a BREVS differs between communities and throughout studies. First, a study of BREVS was conducted between 1986-1994 by the University of Minnesota. This study indicate that the, “number of firms visited ranged from 11-117, with an average of 56” (Ha and Morse 1995). Further research indicated that 30 volunteer visitors were used on average to complete their visits to firms (Ha and Morse 1995). On the other hand, Loveridge (Et Al 1992), contends that on the average, BREVS consisted of 24

volunteers that visited 39 businesses. Immediate employment effects were analyzed from this study. Loveridge (et al 1992) states, “Programs that showed immediate employment effects interviewed slightly more firms, had more volunteer visitors, and had a lower number of firms per volunteer than other programs.”

BREVS rely on utilizing a successful volunteer management infrastructure. This infrastructure must be one that takes into consideration the many different facets of BREVS. BREVS must consider all aspects of volunteer management, not just recruitment, training, and volunteer vs. firm ratio to complete a successful program. Although one BREVS program model will not work for every city, economic development practitioners must still consider utilizing volunteers, given the opportunity.

## **Chapter Summary**

Given the continuous cycle of financial prosperity and downfall, it would be in the best interest of North Texas Cities to utilize BREVS programs. Although many economic development programs continue to focus on landing one company that promises to change the economic environment over night, they don’t realize that these plans require vast resources and often fall through. BREVS focus on the important aspects that a community already possesses. Communities are more likely to benefit from using BREVS if they focus on the ideas and different aspects outlined in the conceptual framework: BREVS leadership and management, BREVS participants, and volunteer management.



## **Chapter 3**

### **Methodology**

#### **Chapter Purpose**

The purpose of this section is to provide insight into the methodology and the technique used to acquire information about BREVS in North Texas. More thoroughly, this chapter examines the strengths and weakness of using a structured interview methodology to describe population, sample of population, and different facets of BREV characteristics outlined in the conceptual framework: BREVS leadership and management, BREVS participants, and volunteer management. Finally, this chapter introduces the operationalization of the conceptual framework.

#### **Research Method**

This study uses an interview method structured by using premeditated concepts operationalized from the literature in chapter 2. Operationalization of variables from the developed conceptual framework allows the researcher to develop a structured questionnaire as a means of gathering data for analysis and interpretation (Babbie 2004).

Structured interview questions are organized by using information obtained from reports, literature, and other documents that were aimed at collecting information. A BREV questionnaire is developed based on the three descriptive categories derived from the conceptual framework: BREVS leadership and management, BREVS participants, and volunteer management. Babbie (2004), describes the importance of a questionnaire as being “an instrument specifically

designed to elicit information that will be used for analysis”. The questionnaire contains open-ended and closed-ended questions, statements for agreement or disagreement, and ratings of important concepts within BREVS evaluated, using a five-point Likert scale. Questions relevant, clear, and structured supports the notion stressed by Babbie (2004) that, a questionnaire/survey provides the researcher with a great amount of flexibility in design. Information obtained using an interview questionnaire provides the researcher with an excellent perception of the different characteristics of BREVS.

### **Strength and Weaknesses of Interview Method**

Phone based structured interviews were used to gather information from different BREV programs. An interview is an ideal method to collect detailed data from BREV stakeholders. Since the population of BREVS in Texas is too large to observe, interviewing many BREVS practitioners is the ideal method to gain valuable insight. Response rates tend to be higher when using structured interview format (Babbie 2010). Second, the presence of an interviewer allows a more intimate detailed setting. As opposed to a survey distributed through the survey monkey or email, respondents are less likely to answer “don’t know” and “unknown” which is more common in other forms of survey research (Babbie 2010). Unlike other methods, interviews are not as straight-forward as survey research, and can sometimes be more difficult to follow. This can lead to data collection that is often left out by the researcher.

### **Sample**

This study is based on a structured interview method with six BREV program coordinators. A sample was drawn from North Texas Cities that indicated they had a Business Retention and Expansion office within their economic development organizations. It is difficult to fully represent all local governments, EDC, and other organizations that implement BREV programs. In addition, by interviewing only six BREV program coordinators, data collected cannot typically be generalized for other BREV programs. However, gathering data on BREVS in North Texas does give an invaluable perspective on how each organization is using BREVS, given their unique economical make-up.

For the purpose of this research, the subjects interviewed were officials who participated in economic development programs in North Texas (specifically Business Retention and Expansion Programs). A total of 15 emails were sent out, with a total of 7 respondents, 6 of which were willing to participate, given the time frame. This led to a 40% response rate from the population that was contacted. The basic information about the town's that provided economic development information can be found in the table below.

<b>Table 3.1: Demographics</b>					
<b>City</b>	<b>Organization</b>	<b>County</b>	<b>Population 2010</b>	<b>Employment</b>	<b>Average HH Income</b>
Keller, Tx	City of Keller	Tarrant County	40,474	2,578	\$124,694
Mansfield, Tx	Mansfield Economic Corporation	Tarrant County/Johnson/Ellis	56,368	8,292	\$82,037
Plano, Tx	Plano City and Chamber Partnership	Collin County	259,841	115,948	\$77,140
Denton, Tx	Denton City and Chamber Partnership	Denton County	114,440	58,581	\$47,297
Denton, Tx	Denton City and Chamber Partnership	Denton County	114,440	58,581	\$47,298
Dallas, Tx	City of Dallas	Dallas County	1,200,530	1,038,314	\$40,147

As identified in the literature, BREVS participants are important in a number of different ways. BREVS participants bring their knowledge and skillsets previously acquired through public sector, private sector, or a combination of public-private sector work. **Table 3.2** identifies the different BREV participants interviewed in this study, and their characteristics, including organization type, workforce diversity, and year's experience with BREVS programs.

**Table 3.2: Characteristics of Participants**

City	Organizations Type	Workforce Diversity	Years Experience with BREVS
Keller, Tx	City of Keller	Public	23
Dallas, Tx	City of Dallas	Public and Private Sector	12
Mansfield, Tx	Mansfield Economic Development Corporation	Public	5
Denton, Tx	City of Denton City and Chamber Partnership	Public and Private Sector	21
Denton, Tx	City of Denton City and Chamber Partnership	Private	5
Plano, Tx	Plano City and Chamber Partnership	Public and Private Sector	21

Only one of the organizations interviewed was an EDC. None of the interviews were public officials, two were from local governments, and three organizations came from a hybrid organization identified as a city/chamber partnership (referred to as public private partnerships PPP). Half of them stated that they had previous work experience in both the public and private sector.

Respondents indicated the importance of experience from both sectors stating:

*Working in both sectors has given me the opportunity to understand how both sectors function.* Finally, all respondents stated that they had been familiar with BREVS

programs since their involvement in economic development. Coordinators' experience in BREVS ranged from 5-21 years.

All interviews, excluding one, were conducted via telephone. Interview times ranged from 25 minutes to 45 minutes with 45 minutes the longest. One interview was done via email conversation. This was done by sending the survey to the participant and answering questions as they took the survey.

## **Statistical Analysis**

A summary of close-ended questions provides an opportunity to analyze qualitative data interpreted from the interview with BREVS coordinators. Second, data collected using quantitated measurements will be interpreted by using simple descriptive statistics. By using descriptive statistics, all quantitative data is presented in a manageable form (Babbie, 467 2004). Descriptive statistics will summarize the findings from the structured interview. This information generalizes the main characteristics of BREV programs in North Texas. The data collected from the structured interview can be used in future studies as well as provide a reasonable interpretation of the general population of BREV programs in North Texas. However, as Babbie (2004), indicates, scientific analysis involves reduction of data which accounts for such a large population and provides generalizations that are more manageable.

## **Operationalization of Conceptual Framework**

Operationalization of the conceptual framework includes interview questions that correspond to the given descriptive categories (Table 3.2). For example, an interview question was asked in order to obtain data on BREV leadership: *Does your organization use an organizational chart?* For some questions, open-ended answers will be recorded. Both open-ended and close-ended questions were used to obtain information during the interview.

**Table 3.3: Operationalization of the Conceptual Framework**

<u>Descriptive Categories</u>	<u>Measures</u>
<p><b>BREV Leadership</b></p> <ol style="list-style-type: none"> <li>1. Clear lines of communication</li> <li>2. Use of strategic planning principles</li> <li>3. Projects adopted Vs. successful implementation</li> </ol>	<ol style="list-style-type: none"> <li>1. Does your organization use an organizational chart? Yes or No 1(a). IF you answered yes to question 1, do you feel that your organization organizational chart clearly defines lines of communication?  Strongly Agree, Disagree, Unsure, Agree, Strongly Agree</li> <li>2. Does your organization use strategic planning principles?  Yes or No 2(a). Which phase of BREV programs do you think strategic planning principles are the most important?  Planning, Development, Implementation, All of the above, Other</li> <li>3. How many BREV plans are fully completed? 3(a). Initially, how many BREV plans are identified? 3(b). Please describe what you feel is the most common barrier in a successful BREV program implementation.</li> </ol>

<p><b>BREV Participants</b></p> <ol style="list-style-type: none"> <li>1. Economic Development Coordinators</li> <li>2. Public Officials</li> <li>3. Public-Private partnerships</li> </ol>	<ol style="list-style-type: none"> <li>1. What type of organization heads your BREVS program?  Economic Development Corporation (EDC), Elected official, Public-Private Partnership, other?  If other please explain.  1(a). What sector did you work in prior to Economic Development?  1(b). How long have you been involved in BREVS programs?</li> <li>2. As a <b>public official</b>, do you believe that understanding economic conditions, demographic, and business climate is important running a successful BREV?  Strongly Agree, Disagree, Unsure, Agree, Strongly Agree</li> <li>3. Are economic goals and visions clearly defined before beginning a BREVS program?  Yes or No</li> <li>3(a). In a public private partnership (PPP), does the issue of governance is an issue in BREVS programs?  Yes or No</li> </ol>
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<p><b>Volunteer Management</b></p> <ol style="list-style-type: none"> <li>1. Recruitment Diversity</li> <li>2. Training Program</li> <li>3. Volunteer Vs. Firm ratio</li> </ol>	<ol style="list-style-type: none"> <li>1. Does your organization rely on the use of volunteers? Yes or No</li> <li>1(a). If yes, how much time do you spend recruiting volunteers?</li> <li>1(b). Do you feel that diversity (public private sector) of volunteers or staff is important in implementing a successful BREV program?  Strongly Agree, Disagree, Unsure, Agree, Strongly Agree</li> <li>2. Does your organization actively train volunteers or staff in the components of a survey program?  Yes or No</li> <li>2(a). Are volunteers trained in statistical analysis?  Yes or No</li> <li>3. How many volunteers do you have on staff per business you plan on visiting?</li> </ol>
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### **Human Subjects Protection**

Since this research dealt with human subjects, a request for review was sent out to the Texas State University Institutional Review Board. The Texas State Institutional Review Board granted this research exemption on October 10, 2011 exemption request number EXP2011I4268.

Dealing with human subjects can be a reason for concern when using social research. For the purpose of this study, an email was sent out to possible participants that highlighted the research purpose, assuring confidentiality of interviewees (city program is identified), and a written statement on how the research will be used. As Babbie 2004 indicates, the use of human subjects can involve ethical dilemmas, and should be carried out using proper techniques to ensure that all ethical dilemmas are avoided.

### **Chapter Conclusion**

This chapter outlines the proper steps and techniques that were used to collect data on BREVS programs. The data collected using structured interviews will be analyzed in the following chapter.

## **Chapter 4**

### **Results**

#### **Chapter Purpose**

The purpose of this chapter is to interpret the findings from the interviews with BREVS program coordinators. The descriptive categories that were assessed using the interview method are evaluated using the conceptual framework found in chapter 2. This chapter identifies the results from the six interviews conducted with the BRE program participants from different cities in North Texas. The results presented in this chapter are outlined, using the three descriptive categories identified in the conceptual framework: BREVS leadership and management, BREV participants, and volunteer management.

Before analyzing each survey question, it is important to note that all respondents indicated the same responses (100%) to many of the questions in the interview. For example, the results gathered from interviews agreed with the importance of establishing clear lines of communication in BREVS programs. All respondents (100%) stated that they use some sort of organizational chart. In fact, many of the interviewees stressed that without the use of an organizational chart, it would almost be impossible to run a successful BREVS program.

Second, all BREVS coordinators agreed that they use strategic planning principles (100%). However, the phase (planning, development, and implementation) in which they believed using strategic planning principles varied among organizations. A number of organizations suggested that other strategic principles are outside the scope of this research, yet they have adopted other

strategic principles to in order to thoroughly exam each phase of BREVS. The use of strategic planning principles, the varying degree of each organizations opinion on strategic planning principles, and the recommendation for additional strategic planning principles are further outlined in the BREV leadership and management portion of this chapter.

Finally, volunteer management presented the most significant amount of variance between the scholarly literature and the structured interview. Structured interviews with BREVS coordinators in North Texas Cities indicated that they no longer utilize volunteers. Instead, organizations rely on technology, economic development-based software applications, and staff, to do the work otherwise completed by volunteers.

The remainder of this chapter examines the aspects in which BREVS varied. Although all three categories are still examined, it is important to analyze the difference for future research on BREVS programs.

### **BREVS Leadership and Management**

The results from interviews agreed with the importance of clear lines of communications in BREVS outlined from scholarly literature in Chapter 2.

First, 67% of all respondents strongly agreed that their organizational chart clearly defines the lines of communications when it comes to who reports to whom. The remaining (33%) agreed that their organizational chart clearly defines who reports to whom within their BREVS organizations. The information regarding clearly defined organizational chart is outlined in **Table 4.1**.

**Table 4.1 Clearly Defined Organizational Chart**

<b>Survey Question</b>	<b>% Agreed</b>	<b>% Strongly Agreed</b>
Does your organization chart clearly define who reports to whom?	33%	67%

Establishing a clearly defined organizational chart is an important aspect of BREVS because they continuously deal with multiple levels within an organization. In agreement with the literature, coordination and support must exist within the different entities involved in any successful economic development program (Moses 1991, 58). This point was stressed in many interviews. In particular, one coordinator stated: *A clear organizational chart is essential, especially dealing with economic development. Our organizations work on a number of different projects, each with multiple layers involving other private and city organizations. One reason we are able to keep our projects streamlined is because we understand our specific roles within the organization.*

BREVS programs are more effective when each individual's role is defined and established through an organizational chart. Overall program efficiency, clearer organizational structure, and defined roles are three examples of how BREVS and economic development projects benefit from the use of an organizational chart.

In accordance with the literature, strategic planning principles are important in multiple ways, and are also examined in this study. More specifically, the importance of strategic planning principles is that they lay a solid foundation that gear BREVS programs towards success. Strategic planning principles utilize active participation among all facets of the community: citizens, public sector, and private officials. For the purpose of this research, each organization interviewed was informed of the basic strategic principles used by Ha and Morse (1995) in their four-state survey of BREVS programs derived from the literature review.

First, it is important to note that all of the organizations interviewed (100%) claimed that they used some form of strategic planning principles. One organization stated: *Although we do agree with the strategic planning principles outlined by Ha and Morse, we go one step further in use of our strategic planning.* This organization emphasized the use of re-evaluating each phase of BREVS programs. They were able to ensure a more effective program overall, as well as closely monitoring all financial activity by re-evaluating each phase of BREVS programs.

Secondly, 83% of organizations believed that strategic planning principles are important in all three phases of BREVS programs: planning, developing, and implementation. This suggests that all three phases are just as important as the implementation phase stressed in the literature. Morse and Ha (1995) found and identified a level of difficulty in BREVS when it came to implementation. However, none of the organizations interviewed stresses implementation as any more important than the other two phases (planning and development).

**Table 4.2: Importance of Strategic Planning Principles in Each Phase**

Survey Question	% All of the above (Planning, Development, and Implementation)
Which phase of BREVS programs do you think strategic planning principles are the most important?	83%

Revisiting the literature, another key component of BREVS is project management. Traditionally BREVS programs adopt numerous projects, which can sometimes inhibit their programs’ ability to fully utilize potential capacity. Thus, a lack in overall results, and many BREVS projects, are left unfinished. By adopting plans that BREVS can realistically complete, the organization is effectively using program staff, resources, and funding.

For the purpose of this survey BREVS participants were asked to elaborate on the amount of BREVS programs that were fully completed within a 3-year time frame. The time frame was adopted after speaking to the first interviewee. A high rate of BREV completion was recorded in **Table 4.3** (67%). The 67% completion rate indicates on average how many BREVS plans are fully completed, according to the organizations that participated in the interview. Specifically, given a three-year time frame, the organizations interviewed averaged 67% of their BREVS plans fully completed.

**Table 4.3 Summary of BREVS Fully Completed**

Survey Question	% Fully Completed
How many BREVS plans are fully completed?	67%

As opposed to the study by Morse in Ha (1995), outlined in the chapter 2, there is a noticeable change in the number of BREVS completed. Notably, BREVS program coordinators try to adopt only plans that they can realistically complete. This can be tied to a number of different factors such as financial responsibilities, resources, or quantitative results that can be measured by the public. Many coordinators shared similar feelings on adopting only plans that can realistically be completed. Of the different organizations surveyed, there was a great deal of variation on the number of plans identified by BREVS coordinators. For the purpose of this research, plans identified are defined as any sort of red flag or suggestion for improvement identified through visitation to local businesses. **Table 4.4** indicates the number of plans identified by BREVS program coordinators. The minimum number of plans identified ranged from 1-2, while the maximum number of plans identified was 10-18. It important to note that most of the coordinators interviewed (67%) identified only plans that they could realistically complete (**See Table 4.3**).

Second, the varying business climate, city size, and population all contributed to the number of plans identified. For example, the City of Dallas only identified between 1-2 plans. Dallas is arguably the largest city out of the sample of North Texas cities, thus they may only identify 1-2 plans to ensure they keep some of their larger corporations in their community. In retrospect, smaller towns (such as



Keller) may focus more of their attention on their numerous small businesses in their community that are essential to sustaining their economic growth.

BREVS coordinators continued to stress that they would like to complete all projects identified by their program. Unfortunately, given many different factors BREVS program coordinators face numerous barriers in running a successful BREVS program. Most of the organizations stressed a lack of resources as the largest barrier facing BREVS. This is synonymous with the overall economic conditions in the United States. Second, many coordinators stressed the lack of incentives that are offered for businesses staying within a community. For marketing purposes, businesses receive a variety of incentives when they relocate, as opposed to staying in a community. BREVS coordinators stressed that there is only so much they can do to keep businesses from leaving, but often incentives offered by competing communities are often “too good” to pass up. **Table 4.5** identifies the most common barriers BREVS coordinators face in North Texas Cities.

**Table 4.4: Summary of Plans Identified Per Year**

Survey Question: Initially, how many BRE plans are identified?	
Organization	# of Plans Identified Per Year
City of Keller	7
City of Dallas	1-2
Mansfield Economic Development Corporation	5-6
City of Denton City and Chamber Partnership	7
City of Denton City and Chamber Partnership	10-18
Plano City and Chamber Partnership	7

**Table 4.5: Summary of Common Barriers**

<b>Survey Question: What do you feel is the most common barrier in BREVS programs?</b>	
<b>Organization</b>	<b>Common Barriers</b>
City of Keller	Lack of Resources
City of Dallas	Lack of Resources
Mansfield Economic Development Corporation	Ineffective Communication
City of Denton City and Chamber Partnership	Ineffective Communication/Lack of Resources
City of Denton City and Chamber Partnership	Some businesses do not have time to meet/Lack of financial incentives for existing businesses
Plano City and Chamber Partnership	Economy/Lack of Resources

## BREVS Participants

Understanding all economic strengths within a given community plays an important role in BREVS programs. The factors that were deemed important in BREVS programs are: economic conditions, demographics, and business climate (a further definition of these factors is identified in chapter 2). **Table 4.6** shows that 67% of BREVS program coordinators strongly agree that having a sound understanding of these characteristics is important in BREVS programs. Some even stressed that these factors should be evaluated completely when taking on any projects in economic development.

**Table 4.6: Summary of Understanding Components**

Survey Question	% Strongly Agree
Do you agree that understanding economic conditions, demographic, and local business climate plays a significant role in a successful BREVS program?	67%

Finally, given that there were only 3 PPP's identified (city/chamber partnership), all respondents were asked about their feelings on the issue of governance between the two organizations. PPP's present a complex environment that can be ethically challenging for many BREVS programs coordinators, private sector officials, and economic development organizations (Ghere 1996). **Table 4.7** summarizes each organization's feeling towards governance. Only 33% felt that governance was an issue in dealing with BREVS programs. However, those that felt governance was an issue felt strongly about identifying each organization's role to avoid any problems. Respondents stated that clearly defining roles, better

leadership, and understanding where the funding is coming from are key in dealing with governance between organizations.

**Table 4.7: Summary of Governance Within BREVS**

Survey Question	% Yes	Comments
In Public Private Partnerships (PPP), do you feel that governance is an issue in BREVS programs?	33%	Better leadership to take charge of clearly defining roles before project begins Must define who makes the rules, and most importantly, where is the majority of the funding coming from

### **Volunteer Management**

Arguably, the most visible aspect of BREVS is the utilization of volunteers. Volunteers are responsible for conducting interviews for BREVS programs using a survey instrument (Laboa et al 1992). However, this research indicates that volunteers do not play a key role in BREVS programs in North Texas cities. All of the organizations interviewed stated that they had used volunteers in the past, but no longer utilize them in their programs. There are two main reasons why these organizations no longer use volunteers. First, all organizations relied on staff to conduct interviews with local businesses. By doing this, the organization claimed it saved time and resources that would otherwise go into a formal training and recruitment plan for volunteers. Second, many organizations are now utilizing computer-based software programs to conduct surveys with businesses. Not only

does this allow for larger city populations to be surveyed, but also most computer-based programs have statistical software built in that provides coordinators with data that would have otherwise taken months to collect and analyze.

Questions initially pertaining to volunteers were adjusted to also include staff. **Table 4.8** summarizes the importance of diversity among BREVS program staff (staff from public and private sector). As indicated below, 67% agree that having a diverse staff is important in BREVS programs, while 33% claimed they were unsure. Respondents felt that a diverse staff could lead to a number of different problems. The most concerning problem identified was the use of personal agendas.

**Table 4.8: Summary of Diversity Among Staff**

Survey Question	% Agree	% Unsure	Comments
Do you feel that diversity (public and private sector) among staff is important in a BREVS program?	67%	33%	The problem lies with is ensuring that either sector is putting aside and accounting for personal agendas

Although these specific organizations did not utilize volunteers, they still recognized the importance in training staff in using the survey instrument and in statistical analysis. The main goals of training staff are to prepare them for the purpose of the visit, establish why interviews are being conducted, and inform them of the specific techniques that will lead to a successful BREVS interview (Cothran 2006). As **Table 4.9** indicates, 33% of respondents confirmed that there was some

sort of training in using the survey instrument. Half of the respondents claimed that they either had someone on staff or had trained staff in the use of basic statistical analysis.

**Table 4.9: Summary of Staff Training**

Survey Question	% Yes
Does your organization train staff in the basic components of using a survey instrument?	33%
Is staff trained in statistical analysis?	50%

### Chapter Summary

This chapter reported the results of the 6 interviews conducted and discussed each of the responses in regards to the conceptual framework categories presented in chapter 2: BREVS leadership and management, BREVS participants, and volunteer management.

Overall, Economic Development organizations use BREVS in order to continuously promote economic growth. The organizations that use BREVS program have shifted away from the previous model outlined in the literature. The main difference in BREVS programs is that of the coordinators that were interviewed, none utilized volunteers. This can be attributed to a lack of resources and advancement in economic development software that allows for larger populations to be surveyed and data analysis less time consuming. The survey indicated that most organizations value the use of clearly defined organizational lines, economic goals, and coordinators that have a combination of both public and private sector work.

Open-ended questions provided insight on BREVS, including what the common barriers that they face. Overall, most BREVS program coordinators stressed a lack of resources as their most common barrier. The interview also allowed additional comments from BREVS program coordinators. These comments provided otherwise unknown perspective about BREVS. For example, on the issue of governance and staff diversity, BREVS program coordinators cautioned against unclearly defined goals, and the use of hidden agendas respectively.

Given the challenges of current economic conditions, it is understandable that many economic development corporations no longer take the time and resources to utilize volunteers. However, by utilizing volunteers BREVS organizations can be more effective by minimizing workload of current staff in order for them to work on other projects, reach more businesses, and establish rapport with businesses leaders that is not offered through online surveys. The following chapter presents a summary of the research and offer recommendations for future investigation of BREVS.

## **Chapter 5**

### **Conclusion**

#### **Chapter Purpose**

The purpose of this chapter is to provide a summary of the findings from the structured interviews in relation to the scholarly literature that was previously researched. Finally, this chapter will provide an outline for future investigation on BREVS program research.

#### **Summary of Research**

Characteristics of BREVS programs were identified using scholarly literature. The three characteristics of BREVS programs that were used in this research are BREVS leadership and management, BREVS participants, and volunteer management. A semi-structured interview was done with six economic development organizations in North Texas to describe the different characteristics outlined in the conceptual framework.

The results of the interviews indicated that BREVS programs utilize many of the important aspects derived from the literature. For example, the use of a clearly defined organizational chart was very important in BREVS programs. BREVS programs that do not incorporate a clearly defined organizational chart are susceptible to numerous issues that can lead to a lack in program efficiency. Secondly, 87% of respondents indicated that the use of strategic planning principles is very important in BREVS programs. Most respondents indicated that they have adopted principles that are closely related to the ones suggested by Ha and Morse (1995) in their four-state survey of BREVS programs. Almost all of the BREVS



coordinators interviewed stated that they dealt with common barriers when working on BREVS programs. Lack of resources was identified as the most common barrier facing BREVS programs in North Texas. Finally, respondents stressed the importance of diversity among BREVS program. Coordinators agreed that having worked in multiple sectors was beneficial to their overall knowledge of BREVS program. However, there were mixed opinions when it came to diversity among staff. Coordinators agreed that having worked in multiple sectors was beneficial to their overall knowledge of BREVS program. However, there were mixed opinions when it came to diversity among staff. Many BREVS coordinators cautioned against the danger of personal agendas among staff involved in BREVS programs. For example, BREVS staff may be stakeholders in a local business; therefore they may operate with their personal agenda in order to ensure business benefits from BREV assistance.

According to the coordinators interviewed in North Texas, their programs no longer utilize volunteers. Although all of the organizations interviewed had some experience using volunteers, they no longer utilized them in their BREVS program. This is by far the biggest variation found between interviews and scholarly literature. Literature stresses the use of volunteers mainly in the survey process of BREVS. However, coordinators cited a lack of resources and technological advances in economic development software that provides data, which would otherwise be the responsibility of volunteers. Second, according to the responses of the coordinators interviewed in North Texas, programs are no longer taking on numerous plans. BREVS programs in North Texas are only identifying plans that

they feel can be completed. This ensures that all resources, time, and staff can focus on completing all phases of an adopted BREVS program. BREVS programs benefit from completion of the projects they set out to work on. The benefit of completing BREVS projects is two-fold: not only does the community see the economic development program completing projects, but local businesses will ultimately have more faith in the support they are getting from local governments.

### **Globalization and Economic Policy**

BREVS programs in North Texas utilize most of the different aspects of BREVS programs. However, information gathered from interviews indicates that each organization has modified its program to fit a specific business climate. The evolution and adaptation tailored towards communities' needs further suggests a need for a strong theoretical understanding of BREVS program. Without appropriate understanding of the multiple aspects of BREVS, coordinators would not be able to adapt and produce results for their economic development program.

One challenge presented in this study was the overall lack of literature on BREVS programs in Texas. The majority of literature on BREVS was focused on Rust Belt states. Further investigation on why BREVS are widely utilized in this area provides valuable insight on their interaction with economic conditions and globalization.

Over the last 30 years, the Rust Belt has seen an increase in national and foreign competition (Kahn 1999). This competition inevitably has led to the introduction and utilization of BREVS programs. BREVS play a larger role in economic

development in the Rust Belt. Unlike Texas, the Rust Belt relies heavily on one industry, steel. The Rust Belt cannot afford to lose their main industry to foreign competition or other competitors. BREVS are prevalent in the Rust Belt because their main goal is to retain and expand businesses in a competitive environment.

Ultimately, the principles and policies of BREVS used in the Rust Belt can greatly benefit economic development in Texas. Specifically, how the Rust Belt has been able to retain and grow businesses. Although Texas does utilize BREVS programs, their economic make-up differs substantially from the Rust Belt. Further investigation of comparable industries from different states, that use BREVS, could provide valuable insight on what works best for different economic conditions.

## **Conclusion**

Business Retention and Expansion Visitation programs continue to allow North Texas cities to show appreciation, build jobs, and promote economic growth in their community. However, given varying demographics, limited resources, and technological advances, many of the characteristics derived from the literature are no longer practiced.

BREVS program coordinators must be well versed in the different aspects of BREVS programs. They must fully understand their business climate to implement a successful BREVS program. Having knowledge of basic fundamentals from both the public and private sector is key, as coordinators have stressed the importance of fully understanding their communities' economic base. However, this was stated with caution, as coordinators also stressed the importance of accounting for

personal agendas by staff from the private sector. In order to avoid a conflict of interest, BREVS coordinators use multiple staff members when visiting businesses. This provides the opportunity for greater oversight to ensure that personal agendas do not play a roll in BREVS programs.

Overall, economic development benefits from BREVS programs in many ways. BREVS provide a rich environment where the public sector can establish rapport with the private sector. Together, both sectors contribute and develop the economic culture that makes up a city.

Further examination of BREVS presents the argument of whether new forms of BREVS are as beneficial when volunteers are not utilized. Volunteers provide the opportunity to conduct face-to-face interviews that can often be perceived as more valuable to the private sector. By establishing a recruitment program and utilizing the same volunteers year to year, BREVS organizations ultimately cut down on the cost of training and recruiting, both of which are important aspects of BREVS.

Today, BREVS tend to rely solely on staff and technological advances to conduct visitations and gather data. Although this can be beneficial, it does not provide the intimate setting that volunteers once gave BREVS. However, by utilizing volunteers, BREVS programs have the potential to become more cost effective, and grow the relationship between businesses and local government. If a volunteer management plan successfully recruits and retains a high number of volunteers, staff within the organization will longer be required to spend a large amount of time or money training, recruiting, and analyzing information collected from BREVS surveys. Instead, BREVS would rely on volunteers to gather information quickly and

ultimately increase the capacity of the number of organizations they can potentially survey.

### **Recommendations for Future Research**

The weakest aspect of this research is arguably the sample size. A larger sample size would provide a better understanding of issues faced by coordinators who use BREVS programs. Second, the findings from a larger sample size would allow future research to generalize about the given population.

This researcher began with very little theoretical knowledge about BREVS programs. It would be beneficial for future research to focus on BREVS by defining specific demographics. This study examines North Texas Cities, which produced a large variation in demographics: population, business climate, and industrial diversity. Given these challenges, it was evident that although these cities were relevant in location, (North Texas) there was a great deal of variation in how each organization operated. For future research, identifying any one of the three characteristics would be an excellent starting point in examining BREVS programs. Focusing on a population that is similar in demographics, will allow the research to build from a solid foundation, and would be viewed as research that can be generalized for all BREVS, given a specific demographic.

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