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Review of Research on Business Retention Programs in the United States

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THE UNIVERSITY-OAKLAND METROPOLITAN FORUM SERIES

The University-Oakland Metropolitan Forum is a partnership of the University of California at Berkeley; California State University, Hayward; Mills College; Holy Names College; the Peralta Community College District; and the Oakland community.

University of California at Berkeley
Institute of Urban and Regional Development

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Problem Definition/Introduction

A strategic planning initiative for the City of Oakland is presently underway to provide an overall future vision for the City shared by the public and private sectors. The goal of the strategic planning process is to define and prioritize key issues that will positively affect Oakland's social and economic future. Economic development has been identified as a key component to revitalizing Oakland. A task force, called the Economic Base Task Force, is creating a strategic plan of action that responds to the challenges and opportunities facing Oakland's policymakers.

Why Business Retention?

Business retention has become a popular component of local economic development efforts in the early 1980s. Business retention programs have sprung up nationwide over the last decade, responding initially to the loss of jobs and firms from the nation's largest cities over the last quarter of a century. Business retention is increasingly becoming the cornerstone of urban and rural economic development programs in almost every state. Cities gain more from development of existing business than they do from attracting outside firms. Retention programs are simpler to implement, less-costly, and more successful in creating more employment. Finally, the retention and expansion of existing businesses sends a positive message to potential investors from outside the city.

What is Business Retention?

Business retention is broadly defined as an economic development strategy or initiative designed to assist existing industries and businesses grow and expand within a community.[1] Business retention is part of a comprehensive local economic development program that includes the following functions:[2]

- increasing firm efficiency
- improving public relations between local government and businesses
- improving the community's quality of life
- offering subsidies for the retention and expansion of firms
- influencing the retention and expansion of state and federal facilities
- creating an early-warning system for plant contractions, closings, and relocations
- designing an overall long-term economic development strategy

These respective efforts overlap and reinforce one another. In particular, business retention efforts also stimulate the birth of local firms and attract companies from other areas.

Business retention programs can be directed toward the individual firm, a particular industry, or certain sections of the local labor force.[3] Business retention efforts often focus initially on the declining manufacturing sector. Retention programs and policies are especially suited to helping local industry adapt to larger structural changes within the economy. However, business retention involves increasing the competitiveness of local businesses generally.

Business retention should be an integral component of a strategic planning process guiding economic development for the city. Strategic planning addresses the long-term obstacles impinging on the economic health of the city. Factors which affect the quality of life in a community -- schools, public services and infrastructure, recreational opportunities, cultural activities -- also have an impact the quality of the business environment. For this reason, insight gleaned through business visitations and retention surveys should be considered an integral component in the overall strategic planning process.

Common Program Features

Framed within an overall economic development plan, a business retention strategy is most useful if it can gage the well being of local industries. Hence, the starting point for business retention efforts is a business outreach or visitation program. The key component of such a program is a survey of existing businesses to gauge their specific needs and complaints, as well as to provide a general assessment of the city's strengths and weaknesses as a place in which to do business. A city can use this assessment to help determine its overall economic well being and its course of action; knowing what keeps businesses at a certain location will help also with knowing how to attract other new businesses to the area. Accordingly, a logical link to outreach and visitation is the "early warning information system" which alerts the city of any problems that local industries are or will be facing. Ideally, constant outreach and visitation will create a situation where impending problems facing industry will be easily observable and identifiable. With this early warning, the city can begin to address the issues rather than embark expend energy trying to figure out what is happening to the economy.

An "early warning information system" is a particularly useful component of a comprehensive business retention program. This system serves to track the economic outlook of local industries and factors influencing profits of individual establishments. Early warnings provide valuable lead-time needed to make the most effective use of the business retention programs surveyed in this report. Advance indication provides the opportunity to explore alternatives to plant closure or relocation. Often, the sources of structural changes in the economy are external to the community and may be largely beyond the scope of local intervention. Still, an early warning system can mitigate the impact to local firms and employees by providing strategically valuable advance notice.

Business retention efforts are directed foremost to addressing the immediate needs of businesses facing contraction, closing, or relocation. An array of programs and policy instruments have emerged in response to these needs. The business retention programs surveyed perform a set of common functions. Some key components of business retention programs nationwide are:

- **Industry Contact Programs** - survey and interview existing firms to determine their needs as well as opportunities for government assistance;

- **Industrial Recognition Programs** - a means to show appreciation to those industries and/or firms who have shown a vested interest in the local economy;

- **Business Development Initiatives** - assistance in Federal procurement, export promotion, technical assistance, market research, business roundtables, match-market analysis, management-labor relations, and incentive programs.

- **Business Incubation and Technology Centers** - designated centers for new technology-based firms which provides low-cost financing, low rents, and technical assistance to foster entrepreneurship. The technology centers also allows new technology information transfers from universities to local businesses.

- **Financial Assistance Programs** - funds to help small businesses, entrepreneurs, and local communities.

- **Brokering Program** - each R&E case involves a brokered solution to a unique problem, including utility services, financing for a new technology to be introduced into an operation, and land or site identification for expansion.

The best business retention efforts are tailored to exploit the comparative advantages of a particular locale. This list of programs and policies is by no means exhaustive and reflects the features common to many business retention programs nationwide. A survey of locale-specific programs should stem from consideration of Oakland's economic constraints and opportunities.

Criteria for Success

The effectiveness of a business retention program hinges on developing and *maintaining* coordination among participants involved in the initial survey process. The institutionalization of a business retention program within a city government or local community may produce better results in the long run. Oftentimes, economic results are difficult to obtain logistically and/or the effects of retention programs are difficult to gauge because of economic growth of this nature is incremental. Also, evaluation may not always be unbiased or objective since many of the changes could have occurred for reasons other than the existence of a business retention program.

Incorporating business retention programs into an existing economic development program or institutionalizing it within a city agency may ensure the continuity of such programs, which may be a better measure of success. This shows that a city is willing and able to help businesses remain in the city and also have formal mechanisms for dealing with problems that face the economy. Programs sometimes have very short lives but institutions maintain some form of longevity. At the very least, this necessitates creating some formal or informal organizational vehicle. Though programs vary tremendously from locale to locale, four considerations can help guide local governments in institutionalizing business retention within the community:[4]

Flexibility to changes in local economic climate -- a business retention program should be evaluated periodically against an overall development strategy so that necessary adaptations are made. Strong links must be established among city agencies, as well as among agencies and representatives of the local private sector and development groups, in order to enhance flexibility through feedback loops. These links provide a steady feedback of data concerning the success or failure of specific programs and concerning the barriers to local development.

Coordination among agencies and programs -- coordination must occur both cross-sectionally among development-related agencies and linearly throughout the process of R&E efforts directed at a particular sector or individual firm. Coordination implies an overall strategy in which the role of each agency or program is clearly defined.

Visibility throughout the business community -- a business retention program needs to be highly visible if it is to reach small local firms, development groups, and individuals. The commitment of city leaders and a centralized point of contact are prerequisite.

Professional staffing and assistance -- business retention activities often call for specialized skills not found within the regular civil service -- credit risk evaluation, structural engineering, marketing, and management. This calls for the inclusion of at least part-time professional assistance from within the business community. An executive loan program is a particularly useful approach.

Business retention represents an effort to foster and *institutionalize* social and professional networks. This is accomplished through efforts to build cooperative coordination in response to existing businesses' needs.

Conclusion/Next Steps

There are two key steps Oakland should take to determine the potential applicability of all or part of existing business retention efforts elsewhere.

First Step - The first recommendation is to expand the existing catalog by conducting more research and contacting professionals in the field who are involved with economic development programs.

- Contact Pamela McNamara, a senior consultant at Arthur Little, Inc. based in Cambridge, MA., or the AEDC Educational Foundation, and/or the Economic Development Institute in Washington, D.C. These three organizations, in partnership with each other, have completed a comprehensive survey of over 150 existing economic development agencies and/or programs throughout the nations. The results are not available to us because of proprietary knowledge. However, Oakland - Sharing the Vision, Inc. may have enough influence to either buy the report or contract with Arthur Little, Inc. to get the results.

Otherwise, representatives from OSV may want to attend an annual economic developers conference held by these groups in Oklahoma City, Oklahoma.

- Search CD-Rom databases to obtain lists of relevant city programs across the nation. The most useful databases are DIALOG, Melvyl, Gladis, Business Information, ABI/Inform, PAIS, PTS Prompt, and Econ Lit.

- Search through the Urban Affairs abstract to compile a list of all local plans and programs.

- Contact Chambers of Commerce in other cities to obtain information and actual economic development and business retention plans.

Second Step - The second recommendation is to further research designated programs/cities to determine whether specific programs should be replicated in Oakland. This research should look at demographics, historical and current industrial base, location, economic strengths and weaknesses, and skill level of the labor force, etc. In order to do a comparative analysis with other cities, Oakland also needs to appraise its own external environment and assess its competitive advantages compared to other cities.

Through these searches, a more comprehensive catalog of business retention programs can be compiled, creating the basis for an in-depth comparative analysis of effective programs. Oakland can then use this analysis to determine whether it can successfully replicate and/or implement such programs.

Endnotes

1. The most current treatment of business retention theory and practice can be found in *The Retention and Expansion of Existing Businesses* by George W. Morse, Iowa State University Press, Ames: 1990.

2. See Morse (1990), pages 4-7.

3. One of the first publications focusing on business retention programs and policies was prepared by Roger Vaughan for the U.S. Department of Commerce. See *Local Business and Employment Retention Strategies* (September 1980), an Information Bulletin prepared by the Community and Economic Development Task Force of the Urban Consortium, a formal organization of the nation's 28 largest cities and 9 large urban counties.

4. See Vaughan, pages 21-22.

CATALOG OF BUSINESS RETENTION PROGRAMS

BALTIMORE, MARYLAND

Agency/Organization:

Greater Baltimore Committee (GBC)

Contact:

Director of GBC, (301) 727-2820
Library, (301) 396-5430

Program Features:

The name of the program is Existing Business Initiative (EBI) and it primarily consists of a regional business survey. The purpose of the survey is to identify specific growth opportunities, target individual trouble spots for assistance, and to determine trends that may be relevant to the work of economic development agencies in the region. Corporate volunteers visit 200 selected companies to conduct personal interviews and the results are then shared with 6 different development agencies and the local government. Each individual agency then use the information to conduct follow-up and provide direct assistance. The key components of the survey are:

1) expansion plans;
2) markets and competition;
3) technology;
4) labor availability and productivity;
5) transportation/accessibility;
6) labor skills/productivity;
7) local government services.

Additional activities in which EBI have engaged include Venture Awards and Corporate Salutes.

BEAUMONT, TEXAS

Agency/Organization:

Bid Resource Center

Contact:

N/A

Program Features:

This Center had been established to cope with massive layoffs in the oil, petrochemical, steel and shipbuilding industries. Now, with Job Training Partnership Act (JTPA) funds available for employment generating services, the local human resources agency, working with the chamber of commerce and other private sources, has decided to create a special unit that would help area companies to ferret out government contracts. Firms have received about $50 million in contracts with the assistance of the Center. They give priority in hiring to JTPA-eligible workers.

BOSTON, MASSACHUSETTS

Agency/Organization:

Bank of Boston's Council for Economic Action's Small Business Development Program

Contact:

N/A

Program Features:

This pilot program is a partnership between Boston University, local financial institutions, and various public small business financial assistance efforts. Forty new businesses have been created as a result of this partnership. This program has been replicated in:

1) Portland, Maine - combines on-site business energy audits for small business with not interest loans;
2) Vohista County, Florida - small business center which is the product of a joint venture between the Private Industry Council and Daytona Beach Community College;
3) Rensselaer County, New York - Business Assistance Service has been formed to help small businesses use government programs and meet regulations;
4) Long Beach, California/Long Beach Chamber of Commerce - has formed a counseling and comprehensive referral network service for local businesses.

BUFFALO COUNTY, NEBRASKA

Agency/Organization:

Economic Development Committee of Buffalo City, Inc.

Contact:

N/A

Program Features:

This committee has devised eight Action Plan Elements:

1) One-on-one program which is a variation of the industrial survey method;
2) Industrial Roundtable;
3) Industry Appreciation Week;
4) Central Nebraska Connection which is a regional import substitution activity;
5) Kearny Telemarketing Association;
6) College Relations Committee;
7) Buffalo City Brochure and Video;
8) Business Services Delivery System.

CHEMUNG COUNTY, NEW YORK

Agency/Organization:

Southern Tier Economic Growth, Inc. (STEG)

Contact:

Robert W. Bivens, Executive Director

Program Features:

The main feature of this program is multiplying local government resources by matching them with private contributions and leveraging those resources with State and Federal funds. Specific program elements include:

1) creating an "Industrial Incubator;"
2) obtaining an UDAG grant for the Toshiba-Westinghouse Joint Venture;
3) creating and financing a unique revolving loan fund for small businesses.

Results include obtaining a $50,000 grant for Downtown revitalization and $1 million for financing the "Mark Twain Musical Drama." In all, STEG's activities have leveraged an estimated $350 million of new capital investment in the County since 1985.

CLEVELAND, OHIO

Agency/Organization:

Economic Development Program in the Urban Center
College of Urban Affairs
Cleveland State University

Contact:

Timothy K. Kinsella, Research Associate in the College of Urban Affairs, Cleveland State University

Program Features:

This program brings together regional economic development organizations (EDO) in Cleveland to form an interorganizational network. Some of the organizations include:

1) Cleveland Tomorrow which consists of 50 CEOs has established Enterprise Development, Inc. to counsel entrepreneurs and direct them to funding sources, and has also created the Primus Capital Fund, a for-profit venture capital fund that has invested in eight firms;
2) Greater Cleveland Growth Association oversees the Council for Smaller Enterprises which offers hundreds of volunteer professionals to help entrepreneurs with management problems and counsels and makes referrals on financing;
3) Greater Cleveland Roundtable which functions as a mediator among interest groups;
4) University Centers for Research, Teaching, and Public Service which includes Case Western Reserve, Center for Regional Economic Issues, and Cleveland State University.

COLLEGE STATION, TEXAS

Agency/Organization:

Technology Business Development Center at Texas A & M

Contact:

N/A

Program Features:

Through the center, faculty and students help entrepreneurs with product development, engineering, market analysis, planning, human resource analysis, financial planning and business plans.

EUGENE, OREGON

Agency/Organization:

Eugene/Springfield Metropolitan Partnership, Inc.

Contact:

John Lively, Executive Director, (503) 686-2741
Jan Pelzel, Executive Secretary

Program Features:

This partnership consists of the City of Eugene, the City of Springfield, Lane County, the Eugene Area Chamber of Commerce, the Springfield Area Chamber of Commerce, and over 360 private businesses and professionals. They provide a multitude of programs and services. Much of their program elements, however, feature business expansion. (See Attachment B).

FORT WAYNE, INDIANA

Agency/Organization:

Indiana Enterprise Center Company

Contact:

N/A

Program Features:

This for-profit company manages an incubator program located in an enterprise zone to take advantage of reduced taxes.

GADSDEN ETOWAH COUNTY (Alabama)

Agency/Organization:

Gadsden Etowah Industrial Development Authority (IDA)

Contact:

Michael B. McCain, Executive Director, (205) 543-9423

Program Features:

The name of the program is Tapping Industrial Potential (TIP). The purpose of the program is to assist area industries through such mechanisms as conducting match-market surveys; creating a personnel manager's association; and providing direct assistance ranging from market research to site grants. This program has helped five local industries obtain $76,000 in site preparation grants for plant expansion, in 1986 attracted seven new industries, and assisted six company expansions which has created 780 new jobs and renewed 2155 existing jobs. (See Attachment A).

HOUSTON, TEXAS

Agency/Organization:

Houston Economic Development Council

Contact:

N/A

Program Features:

The Houston Economic Development Council and a local business association has established a Direct Business Assistance program for small business development. One hundred and fifty professionals with expertise in law, accounting, banking and marketing have been recruited to advise and consult. The staff director is a federal employee of the Small Business Administration on loan to the program.

MIAMI, FLORIDA

Agency/Organization:

Business Assistance Center

Contact:

N/A

Program Features:

This center provides technical assistance, equity and debt to new and expanding businesses.

NEW HAVEN, CONNECTICUT

1. Agency/Organization:
   Science Park Development Corporation

   Contact:
   N/A

   Program Features:
   Science Park is a joint venture between the City of New Haven, Yale University, the Olin Corporation, the State, and the Dixwell/Newhallville neighborhoods. It is a full-service incubator and technology center which is now home to more than 100 businesses and 1000 employees. Another activity that Science Park fosters is the Business Roundtable where entrepreneurs present particular business problems to their peers.

2. Agency/Organization:
   Technology Investment Fund

   Contact:
   N/A

   Program Features:
   This is a quasi-public corporation that provides venture capital to high-risk technology-based firms.

3. Agency/Organization:
   New Haven Community Investment Corporation

   Contact:
   N/A

   Program Features:
   This corporation provides capital for small firms through the Small Business Administration.

4. Agency/Organization:
   Neighborhood Business Development Program

   Contact:
   N/A

   Program Features:
   This program provides technical assistance and financial assistance to firms development new products.

Cumulative results of the above four programs have been estimated at providing New Haven's small businesses with more than $3.5 million in capital, with more than $1 million of that for start-up companies and has helped create and retain hundreds of jobs.

NEW YORK CITY, NEW YORK

Agency/Organization:

Mayor's Office for Economic Development which consists of:

1) New York City Office of Business Development (OBD)
2) Public Development Corporation (PDC)
3) Financial Services Corporation (FSC)

Contact:

Call (212) NY*MAGIC

Program Features:

This office provided a comprehensive list of services to retain businesses within the five burroughs of New York City. Some key components include:

1) administering the Commercial Revitalization Program which provides financial and technical assistance to local commercial strips;
2) maintaining a database of all vacant commercial real estate in the City to match firms with suitable commercial space;
3) obtaining real estate for urban renewal projects;
4) providing loan interest revolving loan funds to businesses.

OMAHA, NEBRASKA

Agency/Organization:

Greater Omaha Chamber of Commerce

Contact:

Omaha Chamber of Commerce

Program Features:

Actions to support the retention and attraction of gold collar entrepreneurs include:

1) restructuring the state's tax structure to encourage creativity;
2) promoting financial and technical support for business risk takers and greater peer group understanding;
3) redirecting the state's higher education system toward technical centers of excellence to support commercialization of research-oriented initiatives;
4) marketing a new Omaha image as a haven for creative and aggressive individuals.

ROCHESTER, NEW YORK

Agency/Organization:

High Tech of Rochester (HTR)

Contact:

Robert Tuite

Program Features:

HRT, launched in 1989 as a quasi-public organization, has established an business incubator and venture capital fund to attract and nurture small high-tech companies. It has helped nearly 100 spin-off companies get started from local businesses and universities.

SHREVEPORT, LOUISIANA

Agency/Organization:

Louisiana State University-Shreveport

Contact:

N/A

Program Features:

The city, surrounding county, and privates sources in Shreveport have created several programs that help retain businesses in the area. Some of these programs are:

1) an Advanced Manufacturing Service program that to give technical assistance and consultant services to local industries;
2) an entrepreneurial development corporation to raise funds for promising new small businesses;
3) a biomedical research foundation, linked to research at Louisiana State University and oriented toward pharmaceuticals;
4) a venture capital clearinghouse that matches entrepreneurs with financial sources;
5) a competitive alliance to solve municipal service and regulatory problems for existing and targeted businesses; 6) a task force to monitor the plan's progress and market the area to potential new businesses.

WAUSAU, WISCONSIN

Agency/Organization:

Marathon County Economic Development Council

Contact:

Roger Luce, Executive Director, (call information)

Program Features:

The Marathon County Economic Development Council, in partnership with the University of Wisconsin and the City of Wausau, have started the Cooperative Manufacturing Technology Project.

PROGRAMS IMPLEMENTED BY COMMUNITY DEVELOPMENT CORPORATIONS (CDC)

This section deals solely with bank community development corporations (CDC). The bank CDC program has existed since the early 1970s and is separately administered by the Federal Reserve System for bank holding companies and by the Comptroller of Currency for national banks. Bank CDCs allow private sector investment in low-income housing, economic development, and neighborhood revitalization.

CHARLOTTE, NORTH CAROLINA

Agency/Organization:

North Carolina National Bank

Program Highlights:

North Caroling National Bank's non-profit CDC has completed more than $100 million of downtown housing and community development projects.

MIAMI, FLORIDA

Agency/Organization:

Consortium of Miami Banks

Program Highlights:

A consortium of Miami banks, led by Southeast Banks, has organized a bank CDC and has funded it at $5 million to provide debt and equity financing to Black-owned businesses in Liberty City area and throughout Dade County.

TOLEDO, OHIO

Agency/Organization:

The Toledo Trustcorp Bank (TTB)

Program Highlights:

Through its SeaGate Community Development CDC, TTB has organized and invested in $237 million of local development projects resulting in 4,200 jobs.

OTHER RETENTION STRATEGIES

This section deals solely with business retention strategies not unique to one particular city.

1. INCREASING EXPORTATION

Barriers to exporting frequently cited by small and medium-sized firms include:

1) lack of financial resources;
2) lack of international marketing information and expertise;
3) government rules and regulations;
4) lack of management commitment.

Local governments are responding to these obstacles by developing export promotion programs which provide technical assistance, financial assistance, and trade leads to help businesses overcome these barriers.

MASSACHUSETTS

Agency/Organization:

Massachusetts Port Authority and the Smaller Business Association of New England

Program Highlights:

The Massport Trade Development Program assists small businesses by providing market and product analysis to help the company assess its export potential with respect to competition, price trends and demand; identifying distributors, agents, licensee partners, and potential customers; and analyzing distribution routes and the cost of shipping to foreign markets.

NEW JERSEY

Agency/Organization:

New Jersey Division of International Trade

Program Highlights:

This Division offers conferences and seminars with the U.S. and Foreign Commercial Service who provide both basic and advanced "how-to" instructions for exporting goods. The state also provides one-to-one counselling with experience staff; publishes an International News Report; and promotes trade shows.

PHILADELPHIA, PENNSYLVANIA

Agency/Organization:

The City of Philadelphia

Program Highlights:

The city administration has borrowed private sector executives and dedicated $350,000 per year to the Philadelphia International Marketing Program. The

Program is designed to help small and medium-sized companies to export, as well as to promote and market the county as a location for foreign investment.

ST. PAUL, MINNESOTA

Agency/Organization:

The City of St. Paul

Program Highlights:

St. Paul has produced 15-minute videotape of eight different companies' products. The companies have received inquiries from London to Bangladesh. St. Paul officials are also working with countertrade brokers in London to establish a countertrade system for small and medium-sized exporters.

2. SISTER CITY PROGRAMS

Agency/Organization

N/A

Program Highlights:

Several cities participate in "sister city" programs to improve trade relations and make contacts. Portland, Oregon is a sister city to Sapporo, Japan, because a trade relationship of several hundreds of millions of dollars annually has developed between the two cities. Louisville, Kentucky, and Montpellier, France, have signed a joint agreement to increase import and export capabilities in each community. Des Moines, Iowa, is a sister city to Kofu, Japan, and Shijiahzuang, China. Both relationships have resulted in a huge market for Iowa-produced goods.

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