

## **BREI Continuous Fundamentals Course Agenda – Online Version**

### **Session I**

- 30 minutes Welcome and Introductions
- 15 minutes Course introduction
- 30 minutes BR&E Program Introduction – What is it and program types
- 30 minutes Assessing the Community – Developing an Economic Picture of the Region
- 15 minutes Questions and homework

### **Session II**

- 15 minutes Reflections and previous session/homework review
- 30 minutes Social Capital – Cause or Effect in BR&E Visitation Programs
- 30 minutes Roles of Leaders
- 30 minutes Survey Design and Implementation
- 15 minutes Questions and homework

### **Session III**

- 15 minutes Reflections and previous session/homework review
- 30 minutes Firm Visitation Training
- 30 minutes Red Flag Review
- 30 minutes Developing a Research Report and Related Presentations
- 15 minutes Questions and homework

### **Session IV**

- 15 minutes Reflections and previous session/homework review
- 30 minutes Action Team Planning
- 30 minutes Community Input, Celebration and Implementation
- 30 minutes Program Evaluation
- 15 minutes BREI membership and certification levels
- 15 minutes Exam and certification instructions

### **BR&E Program Introduction – What is it and program types**

Introduction to the BR&E visitation program concept and the typical forms that this program takes. While this course will focus on the continuous method, it is important for the participants to understand the other methods that are commonly used so that the BR&E visitation program can be tailored to the community.

### **Assessing the Community – Developing an Economic Picture of the Region**

It is important to understand the overall economic situation and trends present in the community in order to effectively communicate with and assist businesses. This section of the course covers various community economic profile formats that are available to economic development professionals with a discussion on how these tools can be used in the community.

### **Social Capital – Cause or Effect in BR&E Visitation Programs**

A major focus in many BR&E visitation programs is the building of community in the area of business relations and assistance. This section covers the importance and fundamentals of building social capital as a part of the BR&E visitation program process.

## **Roles of Leaders**

All BR&E visitation programs are different, but there are some common roles that must be performed if the program is to be successful. This section covers these roles and their associated duties, as well as opening discussion among participants about the ways in which these roles can be combined and implemented.

## **Survey Design and Implementation**

While many continuous BR&E visitation programs use a pre-determined survey (either a commercially available survey or a survey that has been in use in the program for some time), it is important for the economic development professional to understand the basics of survey methodology, including the logic behind the development of the survey questions and the importance of understanding why the questions are included in the survey instrument. This section also covers an introduction of survey sampling and response analysis that will be concluded in a later section.

## **Firm Visitation Training**

Understanding the fundamentals of visiting a firm is paramount to a successful BR&E visitation program. This section covers proven methods of firm visitation, including examples of visitation practices and survey completion.

## **Red Flag Review**

One of the most valuable results of a BR&E visitation program effort is the identification of red flag issues that may result in businesses closing or leaving the community in the short term. This section provides the participant insight in identifying and addressing these issues.

## **Developing a Research Report and Related Presentations**

Effectively communicating the findings of the survey and other research results are primary functions of the professionals conducting the program. This section covers basic report and presentation development, including the targeting of specific audience. This section also includes the conclusion of the survey analysis topic.

## **Action Team Planning**

The ultimate result of the survey effort for most programs is the development of a strategic plan designed to enhance the climate for existing businesses in the community. This section covers the basics of planning in this context, including the roles of individuals participating in the planning process.

## **Community Input, Celebration and Implementation**

For many smaller towns, relating the findings of the survey effort and resulting research to the community is a key strategy in forming social capital and enhancing the community's perception of existing businesses as important pieces in the overall community environment. This section covers the ways in which the BR&E program team can involve the community in the effort.

## **Program Evaluation**

Effectively evaluating the BR&E program is becoming of increasing import. This section provides an overview of proven evaluation methods in order to demonstrate the value of the program to stakeholders and the overall community.