![UF IFAS Extension, University of Florida]

Business Retention and Expansion (BRE) Programs: Measuring Success in Your BRE Program[1]

Derek Farnsworth, Jennifer L. Clark, and Henry M. Cothran[2]

Introduction

"What gets measured gets done"—Peter Drucker

When communities, businesses, and organizations realize they need a vision for the future and a road map for how to get there, a typical response is to initiate a strategic planning process. Many go so far as to set goals and write a plan. Some will implement their plans by completing projects; some will not. Even fewer will go so far as to develop indicators of success, collect baseline data, and implement a process to measure progress toward achieving the goals of their plan.

One of the reasons people or organizations fail to evaluate their programs is because the process can sometimes be quite mystifying. Terms like outcome, objective, or strategy are used interchangeably, leading to confusion on the part of those who are involved in the process. Another reason organizations skip the evaluation part of planning is because successful completion of a project is "good enough" and very little attention is paid to questioning whether or not the activity actually moved the organization closer to its desired outcomes.

This publication is eighth in a series on establishing BRE programs, which is online at the EDIS website at http://edis.ifas.ufl.edu/TOPIC_SERIES_BRE.

Credits: istocksdaily/iStock/Thinkstock.com

Measurement Guidelines

"Not everything that can be counted counts and not everything that counts can be counted"—Albert Einstein

Decide What Can and Should Be Measured

Some measures may provide little information about whether an activity actually moved the program toward accomplishment of a goal. It is important to balance the need to know with the ability to find out. You make this decision based on available resources, including time, money, and the relative value of the information.

Choose the "Real" Measure of the Goal

If your goal is to keep young people from leaving the community by providing more local jobs, increasing part-time, minimum wage jobs should not be the desired outcome. A measure such as increasing manufacturing jobs would lead to a better outomce.

Focus on Positive Outcomes

An increase in employment in a community may also be an indicator that unemployment decreased. So which measure should be reported? Both measures involve value judgments, but increasing jobs may be viewed as the more positive measure to report.

Measure the Progress; Do not Count Activities

If your goal is to revitalize the downtown, the number of meetings on this topic is not a measure of progress, but a count of activities. Measuring the number of merchants who initiate recommended actions is a more appropriate measure (albeit a more expensive one to collect).

Conduct Intermediate Checks on Progress

Using this same illustration, it would be acceptable to report that a number of workshops were conducted because these provide evidence that you are on track toward achieving your overall goal. You might also evaluate the content, timing, and location of specific workshops to determine changes that need to be made to increase merchant involvement.

Balance the Number of Measures

There is no correct number of measures for any one goal. The only constraints are dictated by the time and effort needed to identify the baseline information, and the resources (personnel, time, and money) to track and collect the information needed to document change in the measure. To this end, it also helps to have a limited number of clearly stated measures that are easily related to the goal to be achieved.

Identifying Measurement Terms

In evaluation literature, it is not uncommon to see various measurement activities called by more than one name. For example, one guide might define the term "goal" the same way another guide defines "outcome" or "objective." Thus, it is important to use agreed upon terminology and definitions. Table 1 defines the most common terms used in developing a series of measures for your business retention and expansion (BRE) program. Using these terms as they are defined in this table provides you and your BRE partners and team members with a common language for the process of evaluating progress and success.

Using a Checklist

"You cannot manage what you cannot measure"—Lord Kelvin

Most programs identify one or more goals before considering how success might be measured. It is important, however, to keep in mind that measuring success must begin before activities are undertaken because a baseline to measure change from must be identified. Evaluation must also take place throughout the life of the program. With that in mind, it may be useful to establish a measurement checklist to ensure that your program establishes measures for a logical and complete process. Table 2 illustrates a checklist that can be followed for each goal in the program.

Conclusion

It is important to demonstrate that your BRE program is producing results for the community. This information is important for the BRE program leader, partners, funders, business owner/operators, and the community as a whole. Understanding how to select measures and collect information to evaluate the success of your program is a key characteristic of successful BRE programs. Using agreed upon language, a logical process, and a balanced number of measures can make your program more productive and successful.

Table 1. Common terms used to develop BRE program measures

Term	Definition	Example
Goal	A goal is the condition the program wants to achieve. It should be specific, measurable, attainable, relevant, and time-bound.	Continually identify and train new visitation team members
Objective	An objective is a measurable result that must be achieved (typically within one year or less).	Train 10 team members this year
Activity	An activity is the effort that is undertaken to achieve the objective.	Training sessions
Indicator	An indicator is something that must be changed or achieved by the activity in order to claim progress toward the goal.	Total number of team members
Measure	A measure is how you count or value the status of an indicator.	Change in team members
Unit	A unit defines what is counted.	Team members trained
Baseline	The baseline defines the value of a measure at the starting point.	Team members at the beginning of the year

Table 2. Checklist for establishing BRE program goals.

	For each goal, answer and check off the following:
	What is the goal?
	What are the objectives related to the goal?
	What activities are related to the objective?
	What is the indicator that must be achieved?
	How will you measure the status of the indicator?
	What is the unit of measure related to this indicator?
	What is the baseline value for this measure?
	Will there be opportunities to do intermediate checks?
	Where is the information?
	How will this information be obtained?
	Who will collect the information?
	How many hours will it take to collect the information?
	Will they be paid to collect the information?
	When will the information be collected?
	How will progress from the baseline be measured?
	How can this information be used to achieve the program's goal?