BUSINESS RETENTION AND EXPANSION

Benchmark User’s Guide Summary

INTRODUCTION

The Tier A and Tier B Microsoft Excel documents contain quantified questions from the University of Minnesota Extension Center for Community Vitality’s Business Retention and Expansion (BRE) interview guide. Tier A contains data considered the most important, and Tier B contains supplementary data. The following information will help users best understand how to use these documents and provide users with important information regarding its interpretation.

GENERAL NOTES

The following are general notes regarding these documents:

• This document does not contain individual business responses. It only shows comparisons among the community aggregate data sets.

• The data are arranged in different tabs for each question. Each question is assigned a label, which can be found on the “Index” tab and in the sheet tabs across the bottom of the workbook.

• Some questions required data manipulation in order to be benchmarked. If this is the case, notes for specific manipulations are included below the data.

• Data are presented by community in a table. This allows users to select the triangle (if using a PC) or the filter icon (if using a Mac) at the top of each column to select the criteria in which they want to compare data.

• The headers of the first several columns of each worksheet have explanatory comments associated with them to help understand the data. Hover over the column header for the comment to appear.
Population quintiles were found by identifying the 20th, 40th, 60th, 80th, and 100th population percentiles using the decennial US Census Data immediately preceding the community’s participation in the BR&E program. For example, a community that conducted its surveys in 2003 and one that conducted its surveys in 2009 were both placed into a quintile based on their 2000 population. The quintile ranges can be found in the workbooks and are as follow:

<table>
<thead>
<tr>
<th>POPULATION RANGE</th>
<th>QUINTILE</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 – 4,243</td>
<td>1</td>
</tr>
<tr>
<td>4,244 – 12,680</td>
<td>2</td>
</tr>
<tr>
<td>12,681 – 21,303</td>
<td>3</td>
</tr>
<tr>
<td>21,304 – 37,923</td>
<td>4</td>
</tr>
<tr>
<td>37,924 – 275,277</td>
<td>5</td>
</tr>
</tbody>
</table>

The national and Minnesota unemployment rates are included in each table to give users a rough idea of economic conditions at the time of the survey. Additionally, the unemployment rates listed are for the month of December from the indicated year and are seasonally adjusted.

- [Minnesota Unemployment Source](#)
- [United States Unemployment Source](#)

**LABELING CONVENTIONS**

- Often, many columns refer to the same interview response. In this case, each response was assigned a letter ID that is used throughout the table. The letter is assigned at the response’s first appearance and used thereafter within the table.

- Two additional columns follow the initial response column, indicated by the response’s letter ID and either “Weighted Average” or “Filtered Weighted Average.” These show two things:
  - **Weighted Average**: The values in these columns show the weighted average response to the question, taking into account all firms that have participated in the BR&E survey during the program’s lifetime. These values will remain stationary as you filter data.
  - **Filtered Weighted Average**: These columns show the weighted average of only the communities that the user has selected in the table’s filters. As users change their comparison criteria, the filtered weighted average values will change to reflect these selections.

**USING THE WORKBOOK**

The workbook contains many tables, and when it is first opened, the user will see the “Index” worksheet. The index allows for quick navigation to tables of interest, because each cell is linked to specific worksheets. Additionally, each worksheet is titled by the question’s label. Therefore, users can select which worksheet they want to use by clicking on the tab at the bottom of the Excel window.
Once a question is selected, users will be taken to a data table. Many of these tables are very large, and this is especially true if selection criteria are not set. Users should take time to be sure they understand each column (especially the first few, because these are descriptors of the community) for each new worksheet. The first several column headers contain comments to help with understanding. To access the comments, hover your mouse over the column name.

Knowing information about all communities that responded to a question is interesting, but this does not allow users to understand communities and responses that may be similar to their own. To do this, the data must be filtered. Clicking on the filter next to each column header will allow users to make a number of different selections. First, data can be sorted alphabetically or from smallest to largest, depending on whether the data is text or numeric. Second, users can select the specific criteria in which they’re interested by choosing the radio box next to the data after opening the filter dialogue. Most important, users can choose the text or number filter option in the filter dialogue to create their own criteria. Before trying to use data from Tier A and Tier B, users should experiment with different filter options.

Although some information will disappear after a filter is set, you can go to Excel’s “Data” ribbon filters and clear in order to restore hidden data. When experimenting with different criteria, notice that values in the “Weighted Average” column do not change; however, those values in “Filtered Weighted Average” do. The total filtered line shows only the responses that match search criteria. That is, if a user is looking for the weighted average of a certain response, the “Total Filtered” line will adjust the weighted average for only those communities that match the selected criteria.

If users have any specific questions regarding how to use Microsoft Excel, or the more advanced features of filter use, please download and read the full manual accompanied on the Extension website.

For more information on the BRE program visit www.extension.umn.edu/community/business-retention/. Please contact Michael Darger, Program Director, at darger@umn.edu with any questions or general inquiries.

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