Business Retention and Expansion

Tuesday August 11, 2026

Instructors:

Jim Simon, Principal & President
RSG

Inspired to improve the Golden State in his work, Jim delivers intelligence, innovation and passion to projects requiring his unparalleled expertise in fiscal health, real estate and economic development. For over 30 years, Jim is proud to have led projects that have resulted in the investment of over $10 billion in private and public capital, transforming cities and communities across California. As President of RSG, Jim is helping to shape the next generation of the firm's legacy - leading RSG's team of inspired, creative and insightful consultants that serve over 100 communities each year.

Kevin Ham, Director
RSG

Kevin has 35+ years of experience in local government, state government, nonprofits, and the private sector. He has held leadership roles in economic development and transportation for the cities of Vista, Coronado, a transportation partnership of several cities in North San Diego County and he has owned his own company. He has been a key architect of a region-wide Economic Development strategy known as Innovate78, created the largest craft brewing cluster per capita in the US, and turned around a historic downtown into a thriving commercial center for the city. He served as the past Chair of California Association for Local Economic Development (CALED) and is the current Chair for the California Academy for Local Economic Development (The Academy). Kevin is also a guest lecturer in college level courses in planning and economic development.

Course Description:

This advanced course in business retention and expansion (BRE) will include an overview of BRE best practices and will provide the tools necessary to develop a program to swiftly respond to business needs in the community. The course will also focus on the creation of strategic partnerships between the public, business, and the community to create early warning systems and identify companies at risk of closing or relocating to another area.

Course Core Competencies:

- Role of BRE as part of a comprehensive approach to economic development
- Overview of BRE best practices and common roles of local government and other stakeholders and how these practices and roles have evolved in California recently.
- Effective types of models/tools for establishing and maintaining interface with key businesses/employers among rural, suburban, and urban communities
- How economic developers can prioritize and respond to business needs in their communities
- Positioning BRE program within a larger focus on business "friendliness"

Student Outcomes:

After successful completion of this course, students will:

- Describe the relative value of a business retention and expansion program as part of a larger economic development strategy.
- Summarize the critical reasons why a business may choose to locate or dislocate from a community and the local economic developer's role in navigating these opportunities and challenges
- Identify the components of a business retention and expansion program and the key factors for its success
- Identify key community partnerships and networks to provide resources to support business growth and retention
- Describe at least three economic development outcomes from a successful business retention and expansion program

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