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**IMPLEMENTING**

**LOCAL**

**BUSINESS**

**RETENTION**

**AND**

**EXPANSION**

**VISITATION**

**PROGRAMS**

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**BUSINESS RETENTION & EXPANSION  
VISITATION PROGRAM**

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**INITIATOR'S MANUAL FOR  
STARTING NEW BR&E  
VISITATION PROGRAMS**

George Morse and Scott Loveridge

**NERCRD  
Publication  
No. 72**

## ABOUT THESE MATERIALS

This booklet is part of a set of materials on *Implementing Local Business Retention and Expansion Visitation Programs*, which includes the following:

### Brochures on BR&E Visitation Program

Three versions of a brochure are included with these materials. One gives a quick overview of the program. A second brochure is identical to the first, but with an additional section explaining the roles of Task Force members. A third brochure is identical to the first brochure, but with a special section explaining how Volunteer Visitors participate.

### *Is It for Our Community?*

This booklet gives a more detailed overview of the program.

### *Initiator's Manual for Starting New BR&E Visitation Programs*

The best people to organize a new BR&E Visitation Program in a community are already the busiest people in town. While this program has tremendous benefits, it is also a lot of work. To overcome this dilemma, this study guide suggests efficient ways to use these materials to evaluate whether or not the program is right for a community, and if so, how to organize it effectively and efficiently.

### BR&E Visitation Video

This three part video includes a case study of a successful BR&E Visitation Program, a segment which demonstrates how to visit firms, and a segment on follow-up.

### *Using the Video to Introduce the Program and Train Volunteers*

This booklet provides tips on ways to use the video segments effectively.

### *Local Leadership Team Manual*

This booklet provides details for the local citizens who organize a community's BR&E Visitation Program.

### *Visitation Coordinator Manual*

This booklet gives a step-by-step guide for whoever takes responsibility for organizing the visits to local firms.

## ARE WE SPEAKING THE SAME LANGUAGE?

As you read these booklets, you will run into three terms frequently open to different interpretations. To avoid confusion, we encourage you to use the following definitions for these terms:

**Community Economic Development** is a sustained community effort to improve both the local economy and the quality of life by building the area's capacity to adapt to global economic changes.

**BR&E** includes all community economic development efforts aimed at helping local businesses survive and grow within the community.

**The BR&E Visitation Program** is an action-oriented process for learning about the concerns of local businesses and setting priorities for BR&E projects to address these needs. These booklets focus on a BR&E Visitation approach that has been field tested in many states and subjected to two major evaluation research projects.

**These booklets focus on the BR&E Visitation program. The BR&E Visitation program helps communities with their overall BR&E efforts -- a critical part of community economic development. A glossary of additional terms is found in Appendix A of the booklet *Is It For Our Community?***

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## INTRODUCTION

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While BR&E Visitation Programs offer tremendous benefits to communities, they also are a lot of work. As earlier programs have discovered, there are many opportunities for delays, pitfalls, and embarrassment. Yet, over the past decade, community leaders and researchers have accumulated a lot of experience and evidence on ways to reduce the risks of failure and embarrassment and ways to improve the odds of success.<sup>1</sup>

A dedicated community group can develop a successful BR&E Visitation program without learning from the experiences of other communities, but doing the program on their own generally takes much longer and often results in painful public embarrassments.

This booklet is a study guide to help small groups wishing to start a new BR&E Visitation program. After a group of three or four local people complete this self-study course, they will be able to:

- 1) Decide if the BR&E Visitation program fits their community's needs.
- 2) Determine if their community can do this program successfully.
- 3) Assemble a local team to coordinate this program.
- 4) Explain the program to other local leaders.
- 5) Recruit local citizens to participate.
- 6) Select the firms to be visited.
- 7) Organize the Volunteer Visitor training program.
- 8) Facilitate media coverage.
- 9) Organize follow-up efforts.

### Self-Study or BR&E Consultants?

As with any textbook or study guide, this booklet can be used with or without the assistance of someone already familiar with the program.

Just like learning to swim, there are different philosophies on the best way to learn about BR&E Visitation Programs. Some suggest the quickest way for a person to learn to swim is for someone to take them to the middle of the lake, toss them in, and let them make it back to shore. Others feel a little coaching might improve the percentage that actually survive the learning experience.

“Luck” happens when preparation meets opportunity. To increase your teams luck with this program, you will need to prepare well. Most teams hire coaches to help with this

preparation. In states which have state level BR&E Programs, we encourage community leaders to use Certified BR&E Consultants to coach them on the program. Their role is outlined in the next section of this booklet.

## ASSISTANCE FROM A CERTIFIED BR&E CONSULTANT

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This section outlines the role of BR&E Consultants, describes the functions that they play in different trips to the community, and the certification that they receive from Business Retention and Expansion International. For areas that do not now have consultants, there is information on how development professionals from your area can become one.

### Role of BR&E Consultants

BR&E Consultants coach local leaders and citizens who work on this program. The Consultants facilitate the learning process for the local team. Initially, (often before a group has actually decided whether or not they want to do the program) the Consultants will provide the names and phone numbers of citizens in other areas that have been through the program. This allows a group to visit with their peers in other locales to evaluate whether or not the program really fits their community. If the group decides to proceed, the Consultant can help the local team explore the various roles that local citizens must play and the other aspects of the program.

While the booklets in this series cover all of these topics, it is impossible to cover every circumstance and to list contacts in neighboring communities which might have valuable experience for a community. The BR&E Consultants can provide this additional detail. To give some picture of how the Consultants assist communities, we now outline the trips they take to communities.

### Trips to Community by Certified Consultants

Generally BR&E Consultants take between eight and twelve trips to your community over the two years that it takes to implement a BR&E Visitation program. Naturally, this varies by state, so be sure to ask how it works in your state.

Here are the typical trips and the type of assistance provided to a community. Details on each of the first four trips



follow later in this booklet. Details on trips five through eight are covered in the other booklets in this series. If your BR&E Consultant lives far away from your area, many of these meetings can be done by speakerphone.

#### **Trip 1: Meeting with Leadership Team**

This introductory meeting is often held with a small group of four to six persons to introduce the program. While some states ask the local group to do this one on their own, the Consultants will assist in providing the names of citizens in other communities that have done the program. This makes it easier for the team to check out the program.

#### **Trip 2: Meeting with Leadership Team**

This session explores the roles of local citizens and ways to recruit them.

#### **Trip 3: Meeting with Leadership Team**

At this session, the Leadership Team completes its plan of work in preparation for the Volunteer Visitor training.

#### **Trip 4: Task Force Meeting and Practice Visits**

The Consultant goes on two practice visits with the Leadership Team and then meets with the Task Force to explain the program. Generally, the Consultant provides the basic survey, with the community able to add three or four local questions.

#### **Trip 5: Volunteer Visitor Training**

The Consultant provides the primary leadership for this session to train the volunteers. However, he/she will want to have two or more members of the Leadership Team to lead parts of the training.

#### **Trip 6: "Red Flag" Meetings**

The Consultant goes to at least one of the two or three meetings held to deal with the "red flag" issues (those with immediate urgent concerns). At this meeting the Consultant will coach the group on the process for dealing with red flag issues. The role of the Consultant is to explain the process and answer questions. The Task Force members make all of the decisions on what to do about local red flags.

#### **Trip 7: Task Force Retreat**

Together with the researcher who has analyzed the data from the firm visits, the Consultant and the Leadership Team lead this meeting. Again, the Task Force makes all of the decisions on priority projects.

#### **Trip 8: Community Commencement Meeting**

The Consultant shows the Leadership Team formats that other communities have used and plays a minor role in the presentations.

#### **Trips 9 to 12: Quarterly Meetings of Task Force**

After the completion of the planning phase of the BR&E Visitation Program, the Task Force should plan to meet at least quarterly over the next year. Groups that no longer meet once the plan is developed seldom implement their plans. The Consultants attend these meetings, although their role is much more open ended. Often they can provide contacts to state and regional development professionals that can help the local implementation teams.

### **Business Retention and Expansion International Certification**

Business Retention and Expansion International (BREI) is a nonprofit, professional association of economic development professionals who are working for the advancement of business retention and expansion. BREI includes members from state development agencies, universities, extension service faculty, utilities, and private consultants. Any individual interested in BR&E is welcome to join.

BREI offers a certification program for consultants working on BR&E Visitation Programs.<sup>2</sup> The BREI certification prepares consultants to use the same approach as outlined in this series of booklets. The certification program was developed based on the experiences of over 75 local BR&E Visitation Programs and the results of two major research projects.<sup>3</sup> Currently, there are sixty consultants in twenty-eight states.

In many states there is no fee for assistance from the consultants. Some states do charge a fee to cover the research portion of the program. Generally, however, the consultants will help a community in the early stages at no charge. This varies, however, from state to state.

If you do not know how to contact one of these consultants, you can get a complete list by connecting with the Business Retention and Expansion International web site at: (<http://www.brei.org>).

If your state or area does not have any certified BR&E Consultants, you or others can become one by completing BREI's Certification Course. For information on this, contact BREI.



## **LEADERSHIP TEAM ORIENTATION**

The five basic steps of the Leadership Team orientation are:

**Meeting 1:** Is it for Our Community?

**Meeting 2:** Volunteer Roles in BR&E Visitation Programs

**Meeting 3:** Plan of Work

**Meeting 4a:** Practice visits to Two Firms

**Meeting 4b:** Task Force Orientation

### **Meeting 1: Is It for Our Community?**

#### **Participants:**

- 1) Four to forty local citizens interested in learning about the program.
- 2) BR&E Consultant: as a resource person.

#### **Purpose:**

By the end of the meeting the participants will be able to:

- 1) Decide if they wish to do the program, or identify additional questions that need exploration.
- 2) Identify persons who might serve on the Leadership Team.

#### **Distribute in Advance:**

BR&E Visitation Brochures (either brochures included in this notebook or similar brochures designed by state BR&E Visitation program).

#### **Handouts at Meeting:**

- 1) "Self-Assessment Guide" in Appendix A of the booklet *Using the Video to Introduce the Program and Train Volunteers* (used only if there has been a prior BR&E visitation program in area).
- 2) Discussion Questions for Meeting #1: Is This BR&E Visitation Program for our Community? (in Appendix A of this booklet)

### **Suggested Agenda (about two hours):**

Introductions .....	10 min.
Sibley County Example (video segment #1) .....	15 min.
Discuss and prepare questions .....	10 min.
Speakerphone call to experienced BR&E leader .....	20 min.
Local Discussion .....	30 min.
Identify persons for Leadership Team .....	20 min.
Set next meeting (if proceeding) .....	5 min.

#### **Handouts for next meeting:**

- 1) Booklet - *Is It for Our Community?*
- 2) Discussion Questions for Meeting #2:  
Objectives and Roles of Leaders (in Appendix A)

#### **Details on the meeting:**

See the booklet - *Using the Video to Introduce the Program and Train Volunteers*

#### **Participants in Meeting 1:**

Some local initiators prefer to keep the attendance at this first meeting small until a group of four to six local leaders has a chance to carefully study the program and be prepared to answer questions on how it might work when the larger group meets. In other cases, the local initiators prefer to have the larger group attend this meeting and give their blessing to exploring the program further. There are pros and cons to both approaches. Those using the first will be able to answer more questions about how this differs from past attempts at BR&E and what the benefits and costs would be. Those using the second will know if the group is behind them from the start.

### **Meeting 2: Volunteer Roles in BR&E Visitation Programs**

#### **Participants:**

- 1) Four to six local citizens willing to provide leadership to program
- 2) BR&E Consultant - as a resource person

#### **Purpose:**

By the end of the meeting the participants will:

- 1) Be able to describe the role of Volunteer Visitors and Task Force members.
- 2) Understand the quarterback analogy for coordinators.
- 3) Be able to describe the major responsibilities of each of the coordinators.
- 4) Have decided who will serve as coordinators.
- 5) Have selected some of the Task Force members.



**Distribute in Advance:**

- 1) Booklet - *Is It for Our Community?*
- 2) Discussion Questions for Meeting #2: Objectives and Local Leaders (Appendix A of this booklet)

**Suggested Agenda (about two hours)**

Program Benefits .....	20 min.
Discussion of question 1*	
Role of Volunteer Visitors and Task Force .....	10 min.
Discussion of question 2*	
Leadership Team Roles .....	60 min.
Discussion of Roles	
Discussion of questions 3 to 5*	
Selection of Task Force Members .....	30 min.
Discussion of question 6*	

\*Discussion Questions for Meeting #2 - Appendix A

**Handouts for Next Meeting:**

- 1) Booklet *Local Leadership Team Manual*
- 2) Booklet *Visitation Coordinator Manual*
- 3) Discussion Questions for Meeting #3: Plan of Work (in Appendix A of this notebook)

**Discussion of the agenda:**

While there is no right or wrong answer to question 1, it is useful for the group to discuss which of the objectives are most important in their community.

The key point on the roles of Volunteer Visitors versus Task Force members is that the Volunteer Visitors only visit firms, while the Task Force members visit firms and also fill additional roles.

The BR&E Consultant will outline the details on the roles of the different coordinators. Alternatively, each person can read the sections in the *Leadership Team Manual* and the *Visitation Coordinator Manual*.

Finally, the Leadership Team needs time to start selecting the Task Force. Each member of the Leadership Team should agree to make a few personal contacts prior to the next meeting.

**Meeting 3: Plan of Work**

**Participants:**

- 1) Leadership Team (four to six persons)
- 2) BR&E Consultant - as a resource person

**Purpose:**

By the end of the meeting the participants will have:

- 1) Finalized the Task Force membership.
- 2) Finalized the Plan of Work (Appendix C).
- 3) Developed recommendations on type and number of firms.
- 4) Prepared an agenda for a Task Force meeting.

**Distribute in Advance:**

- 1) Booklet - *Local Leadership Team Manual*
- 2) Booklet - *Visitation Coordinator Manual*
- 3) Discussion Questions for Meeting # 3: Plan of Work (in Appendix A of this notebook).

**Suggested Agenda (about two hours):**

Finalize Task Force membership .....	30 min.
Discuss question 1*	
Finalize the Plan of Work .....	40 min.
Discuss questions 2 - 4*, complete Appendix C	
Develop recommendations on firms .....	20 min.
Discuss questions 5 & 6*	
Prepare agenda for Task Force meeting .....	30 min.
Discuss questions 7 - 9*	

\*Discussion Questions for Meeting #3 - Appendix A

**Discussion of the agenda:**

There probably isn't a more important task that the Leadership Team does than select the Task Force. If you pick a strong Task Force that represents a broad cross section of the community and that is willing to work hard, the program will be successful. If you review the *Leadership Team Manual* and the *Visitation Coordinators Manual*, it will be relatively easy for you to finalize the plan of work. At this meeting it is a question of coordinating schedules and dates and each coordinator asking for assistance from the rest of the team as appropriate.

A Task Force meeting is essential before training the volunteers. The Task Force needs to understand the program and agree to do it as a group (even if each person has individually agreed to do it). They also need to decide on the number of firms and how to recruit Volunteer Visitors. See the next section for an agenda. You can check page 12 of the *Leadership Team Manual* for ideas on how to get good attendance.



## Meeting 4a: Practice Visits to Two Firms

### Participants:

- 1) Leadership Team

### Purpose:

By the end of the practice visits, the Leadership Team will have:

- 1) Visited one or two firms
- 2) Completed Appendix E: Report on Practice Visits (in *Local Leadership Team Manual*)

### Distribute in Advance:

- 1) Current survey from state sponsor
- 2) Appendix E: Report on Practice Visits (in *Local Leadership Team Manual*)

If you are a member of the Local Leadership Team guiding a community through this program, you don't want to be embarrassed at a volunteer training session. So don't skip this step. Occasionally, local leaders will insist that visitors should memorize the survey and not take it into the firm for the interview. **This should be discouraged.** If you have done the practice visits, you can report on how well the firms you visited received you. You also can avoid attempts to make major revisions in the survey. And finally, you can discover any rough spots in the survey prior to having fifty to one hundred copies printed. See *Local Leadership Team Manual* for details on doing these practice visits.

Often meetings 4a and 4b are done on the same trip to the community.

## Meeting 4b: Task Force Orientation

### Participants:

- 1) Leadership Team and Task Force members
- 2) BR&E Consultant - as a resource person

### Purpose:

By the end of the meeting, the Task Force members will be able to:

- 1) Explain the goal of the program and how it works.
- 2) Determine the number and type of firms to be visited.
- 3) Suggest several additional local questions for survey.
- 4) Recruit another person as a firm visitor.
- 5) Select a date for the Volunteer Visitor training.

### Distribute in Advance:

- 1) *BR&E Task Force Brochure*. This goes with a letter announcing the date, time, location, agenda, and list of those invited to the meeting. All those invited are personally contacted prior to mailing the letter.

### Suggested Agenda (two hours):

#### First Hour: Introduce the Program

- Opening Remarks (coordinator) ..... 10 min.
- Review purpose of meeting and BR&E (coordinator) ..... 5 min.
- Show video- Sibley County Example ..... 15 min. (video segment #1)
- Explain role and expectations of the Task Force ..... 5 min.
- Small groups develop questions ..... 10 min.
- Resource person (often on speaker phone) ..... 15 min.

#### Second Hour: Task Force Decisions

- Determine number and type of firms to visit ..... 30 min.
- Discuss addition of two or three local questions ..... 20 min.
- Ask Task Force members to recruit volunteers ..... 5 min.
- Select dates for training ..... 5 min.

### Discussion of Agenda:

Details on Part I are given in the booklet *Using the Video to Introduce the Program and Train Volunteers*.

Generally the Leadership Team will recommend the type and number of firms to be visited. For example, is this program aimed at manufacturing, tourism, or agriculture? Likewise, the Leadership Team will recommend the number of firms to visit. Typically this is between thirty and one hundred. The *Visitation Coordinator Manual* has more detail on this item.

Most state programs encourage local groups to develop two to four local questions on pressing local issues (e.g. Should our town merge with another? Should we endorse the metro phone system? Should we endorse the building of a YWCA? Should the Chamber continue activity X?) At this stage, the exact wording for these is not important, but it is important to develop a consensus on the top issues. Use Appendix B: Task Force Meeting Minutes as a worksheet for keeping track of who attended and what decisions were made.

To maximize attendance at the training, let the Task Force pick the best date.

## HINTS ON INTRODUCING BR&E VISITATION PROGRAMS

Communities that have never heard of this approach to doing a BR&E Visitation Program can't evaluate whether or not it fits their needs. Communities that used a different approach and had disappointing results are less likely to want to do this one - at least until they understand the differences in the two programs.

The following tips are aimed at helping community leaders really understand the program well. Many communities adopt this approach once they understand it. However, the program does not fit all communities at all times. Thus, groups who are thoroughly introduced to it can decide for themselves whether or not it fits and whether or not they are ready to go with the program.

### Hint 1: Be sure you understand the program

Before local initiators try to introduce the program to a larger group, they must be able to answer many questions on it. Once an individual has completed this orientation program, she/he will understand it very well.

### Hint 2: Use the "Self Assessment Guide"

Often you will hear, "We have already done BR&E." Maybe this is true; maybe it isn't. If the community has recently done BR&E visits in the same fashion as described in these booklets, then probably they should not do it again. To evaluate how earlier efforts compare to this, complete the "Self-Assessment Guide" found in Appendix A of the booklet *Using the Video to Introduce the Program and Train Volunteers*.

### Hint 3: Use the Video on Sibley County

The video can say a lot of things you can't. Check the booklet *Using the Video to Introduce the Program and Train Volunteers* for hints on how to use it effectively. If your state or a neighboring state has a video on a BR&E Visitation Program with similar features, use it.

### Hint 4: Share BR&E Research Report and Summary

One of the most visible aspects of the program is the report. Share a copy of a report from an earlier program. Try to get reports that list the names and positions of the local participants in the prior programs. Local leaders will often know some of those people and will contact them to see whether they would recommend the program.

### Hint 5: Give Examples of Program Benefits

To get good examples of program benefits, read *Is It for Our Community?* and ask your BR&E Consultant for examples or for the names of people in other communities that you can call.

### Hint 6: Contact Citizens in Other Communities

While a personal visit to another community by a group is best, these contacts can be made in many ways. Some groups do it by speaker phone. (See the booklet on *Using the Video to Introduce the Program and Train Volunteers* for tips on this.) Others split up a list of names and do individual phone contacts. Regardless of the method, talking to citizens in other communities that have done the program is the best means of understanding both the benefits and the costs of the program. Ask your BR&E Consultant for names and phone numbers.



## **IS OUR COMMUNITY READY TO DO THE BR&E VISITATION PROGRAM?**

BR&E Visitation Programs require a lot of work. Naturally, you want to avoid the embarrassment of starting a program when a community is not prepared to successfully complete it. If your state has no formal application process, you can use the following questions to see if you are ready. If you cannot answer all of these affirmatively, you need to do some more preparation.

### **Does our program have:**

1. A Visitation Coordinator who has completed the orientation?
2. A Business Resources Coordinator who has completed the orientation?
3. A Milestone Meeting Coordinator who has completed the orientation?
4. A Media Coordinator who has completed the orientation?
5. An Overall Coordinator who has completed the orientation?
6. A Task Force of twenty to forty local citizens who have been individually contacted?
7. A Task Force with the following groups represented:
  - Business leaders?
  - Development professionals?
  - Local government officials?
  - Educational professionals?
  - Other community leaders?
8. A Task Force that met as a group for orientation and decided to proceed with the program?
9. Written pledges from the Task Force members who agree to participate for at least two years?
10. Written endorsements from other local groups within the community to support the BR&E Visitation process?

11. A clear understanding of the guidelines for the program, including the role and costs, if any, of the State Sponsor or BR&E Certified Consultant?
12. A plan to get the data analyzed and the report written? (In most states this is done by the State Sponsor, and there may be a cost.)
13. A detailed work plan which lists the task to be done, the person handling it, and the target date? (Some dates can only be estimates beyond the Volunteer Visitor training.)

If the answer to any of these is "NO," your program isn't quite ready for publicly announcing that you are ready for training volunteers for the firm visits.



## APPENDIX A: DISCUSSION QUESTIONS

### Discussion Questions for Meeting #1: Is This BR&E Visitation Program for Our Community?

After completing the Self-assessment Guide (found in *Using the Video to Introduce the Program and Train Volunteers*) answer the following question.

1) Outline how your earlier BR&E Visitation program might differ from this approach.

After viewing video segment #1 (Sibley County Story), complete the following discussion questions:

2) The first segment of the video lists four objectives for local BR&E Visitation programs. Which two of the four local objectives for BR&E Visitation programs do you feel are likely to be most important in our community? Why?

3) What questions do you have about how the program works? (List all you can think of and discuss as a group before you call the person who has already done the program.)

4) Interview a person from another community who has completed this type of BR&E Visitation program. (A speakerphone may be the most economical way to do this.) Ask him/her the following questions:

(a) List the name and address of the person being interviewed so that you have complete follow-up information:

Name \_\_\_\_\_ Phone (\_\_\_\_) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Employer \_\_\_\_\_



(b) Could you tell us a little bit about your program?

(c) We have several questions among ourselves about the program and how it works. We'll just go around the group and ask these, if that's okay. (Now use the questions you developed after watching the video.)

(d) What do you see as two or three primary benefits of the BR&E Visitation Program in your community (or communities you have worked with)?

(e) Given the benefits to yourself and your community, as well as the costs of doing the program, would you recommend that a person like myself invest in the orientation program?

YES, DEFINITELY

YES, PROBABLY

MAYBE

NO, PROBABLY NOT

NO, DEFINITELY NOT

(f) Why did you respond as you did in question (4e)?

5) Why is it important to have community leaders actively involved in the BR&E Visitation program?

6) What groups are typically included in the Task Force? What are the advantages of having these different groups?

7) Thanks for helping us out. Can we contact you again if we have additional questions?





### **Discussion Questions for Meeting #3: Plan of Work**

1) Whom should we invite to be on the Task Force from each of the following groups?

Business Leaders  
Development Professionals  
Local Government  
Educational Institutions  
Other Community Leaders

2) Which member of the Leadership Team will do each of the tasks shown in the Plan of Work? (Fill out the Plan of Work sheet in Appendix C.)

3) What tasks will you assist other coordinators to complete? (Remember, each coordinator is only the quarterback of their primary area not the whole team.)

4) Are there other tasks that need to be done which are not shown on the Plan of Work in Appendix C? If so, what are they, who should do them, and when should they be done?

5) How many firms should we recommend be visited? (Remember that you need half as many volunteers as firms to be visited assuming each team visits four firms; two-thirds as many if each team visits three firms and an equal number if each team visits two firms)

6) What types of firms should we recommend be visited? (Manufacturing, tourism, mixed sectors, dairy, swine, etc)?

7) What do you think of the suggested agenda for the first Task Force meeting? Any changes needed?

8) What date, time, and place should we hold the first Task Force meeting?

9) What can we do to ensure a good turnout?



## **APPENDIX B: TASK FORCE MEETING MINUTES**

- 1) What was the agenda? (Attach , if desired)
  
- 2) Who attended? (Attach list with names, addresses, phones, employment, and public offices held)
  
- 3) What decisions were made?



## APPENDIX C: PLAN OF WORK

Communities in program \_\_\_\_\_

BR&E Consultant: \_\_\_\_\_ Phone: \_\_\_\_\_

### **Leadership Team Members:**

Overall Coordinator: \_\_\_\_\_ Phone: \_\_\_\_\_

Media Coordinator: \_\_\_\_\_ Phone: \_\_\_\_\_

Visitation Coordinator: \_\_\_\_\_ Phone: \_\_\_\_\_

Business Resources Coordinator: \_\_\_\_\_ Phone: \_\_\_\_\_

Milestone Coordinator: \_\_\_\_\_ Phone: \_\_\_\_\_

### **Task Force Members:**

Business Persons:

Development Professionals:

Local Government Officials:

Educational Professionals:

Other Community Leaders

**Addresses:** Attach complete addresses, with phone numbers for each person.



### **Preparations for the Volunteer Visitor Training**

If these preparations are done, the visitation completion rate will be very high, often above eighty-five percent. While the visitation coordinator oversees this aspect of the program, all Leadership Team members and some Task Force members will need to help to get the tasks done on time.

#### **Before the Firm Visits Are Done:**

The Visitation Coordinator coordinates this stage of the program but will need the help of all of the other members of the Leadership Team.

	Target Date/Person Responsible
<b>Practice Visits</b>	
Select date	_____
Select two firms to visit	_____
Send firms copy of letter and survey	_____
Handle immediate follow-up from visits	_____
Make copies of surveys from practice visits and mail to the BR&E research office	_____
Find local economic development studies	_____
<b>Task Force Organizational Meeting</b>	
Arrange room with speaker phone	_____
Who will personally contact whom?	_____
Mail out notices to Task Force	_____
Telephone tree reminder on meeting day	_____
<b>Preparation for Visitation Volunteer Training</b>	
Secure written endorsement from sponsoring group	_____
Secure written endorsements from other local groups	_____



Prepare mailing labels needed for program

a. Firms to be visited

---

b. Volunteer Visitors

---

c. Task Force members

---

Mail notice of volunteer training

---

Organize telephone tree for contacting volunteers  
on day of training

---

Mail letter and survey to firms

---

Arrange meeting room for training  
(with phone jack and tables)

---

Get speaker phone, VCR, TV, overhead projector

---

Write a news release on BR&E Visitation

---

Select date of first Task Force meeting  
after firm visits are started

---

**Preparations for Media Coverage**

The Media Coordinator either writes news releases for the local media or encourages media staff to cover the program at the following stages:

Applying for the program

---

Being accepted in the program

---

Training the volunteers

---

Visiting local businesses

---

Following up on industry's concerns

---

Special interest stories on unique products  
or services of local firms

---

Community Commencement Meeting

---

Implementation of specific recommendations

---



**Preparations for Immediate Concerns or “Red flag” Review**

The Business Resources Coordinator organizes this aspect of the program. However, she or he often will call on other Leadership Team members or Task Force members for assistance.

Contact the state and/or federal agencies on assistance available

---

Prepare 1 to 2 page summary on programs to firms after firm visits

---

Organize 2 or 3 Task Force meetings for red flag review, starting two weeks after firm visits are started

---

Coordinate red flag follow-up by Task Force

---

**Preparations for Task Force Retreat**

The Leadership Team organizes this retreat under the coordination of the Milestone Meeting Coordinator. This is about six to eight weeks after completing the surveys.

Make physical arrangements for retreat

---

Send out written invitations for retreat

---

Organize telephone network for retreat

---

**Preparations for Community Commencement Meeting**

The Milestone Meeting Coordinator also organizes Leadership Team efforts on this meeting, which is held about four weeks after the Retreat.

Make physical arrangements for retreat

---

Send out written invitations for retreat

---

Organize telephone network for retreat

---

**Implementation of Priority Projects:**

Date of First Task Force Meeting After Community Commencement Meeting

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## RESEARCH CITED AND END NOTES

<sup>1</sup> While there has been extensive formal research on the BR&E Visitation Program, many of the improvements in the program, while consistent with strategic planning and community development theory, were actually suggested by local leaders that were doing the program.

<sup>2</sup> The certification course was used to develop this series of booklets.

<sup>3</sup> Various findings from these two research projects can be found in the following publications:

Allanach, Christopher, 1995, "The Market for and Impacts of Business Retention and Expansion Visitation Programs." Master's Thesis, Department of Applied Economics, University of Minnesota.

Loveridge, Scott and Thomas R. Smith, 1992, "Factors Related to Success in Business Retention and Expansion Programs," *Journal of Community Development Society*, Vol.23, No. 2, pp. 73-74.

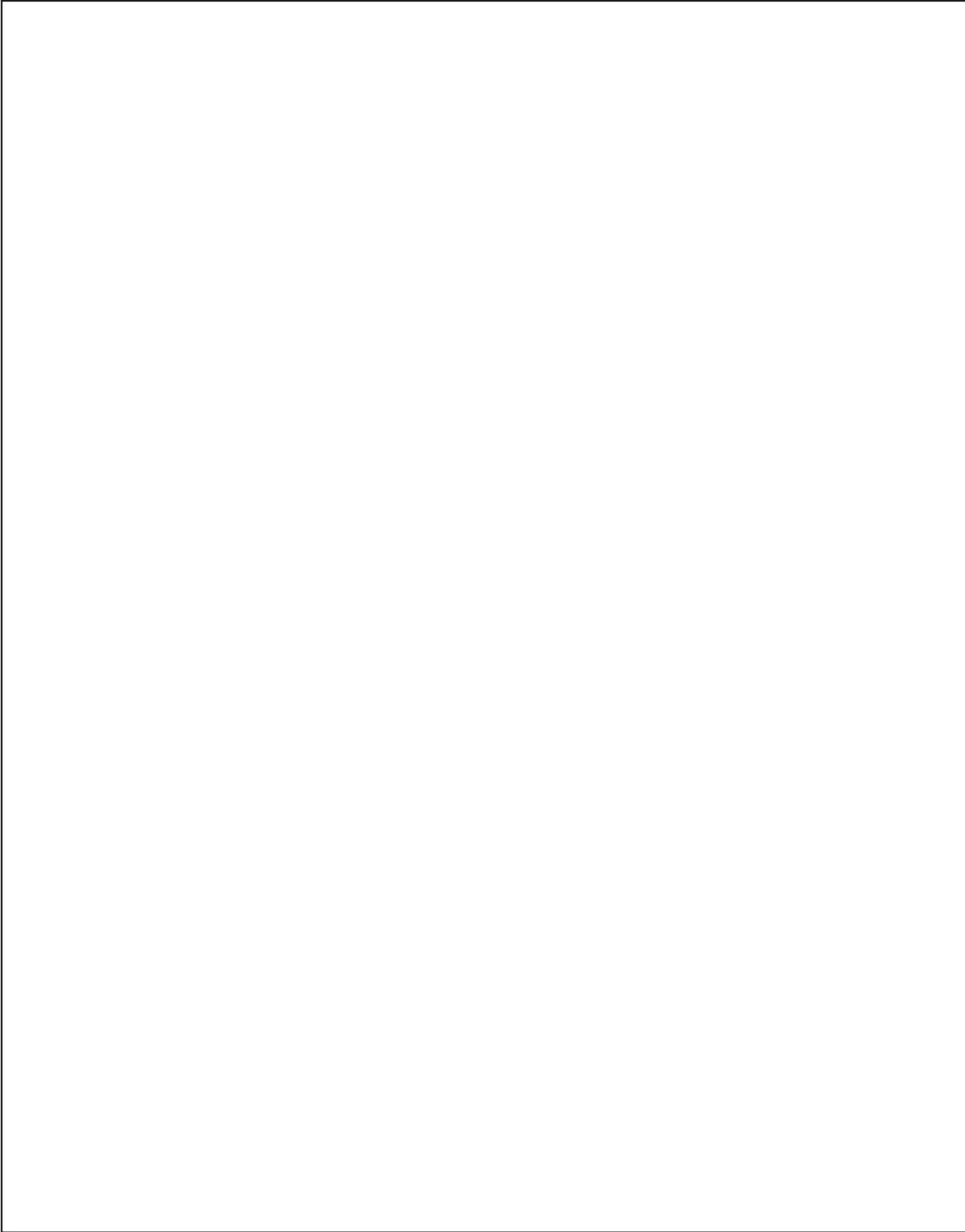
Loveridge, Scott, and Thomas R. Smith, 1992, "Fostering Partnerships Between Local Governments and Rural Businesses," *Public Productivity and Management Review*, Vol. 25, No. 3, pp. 329-340.

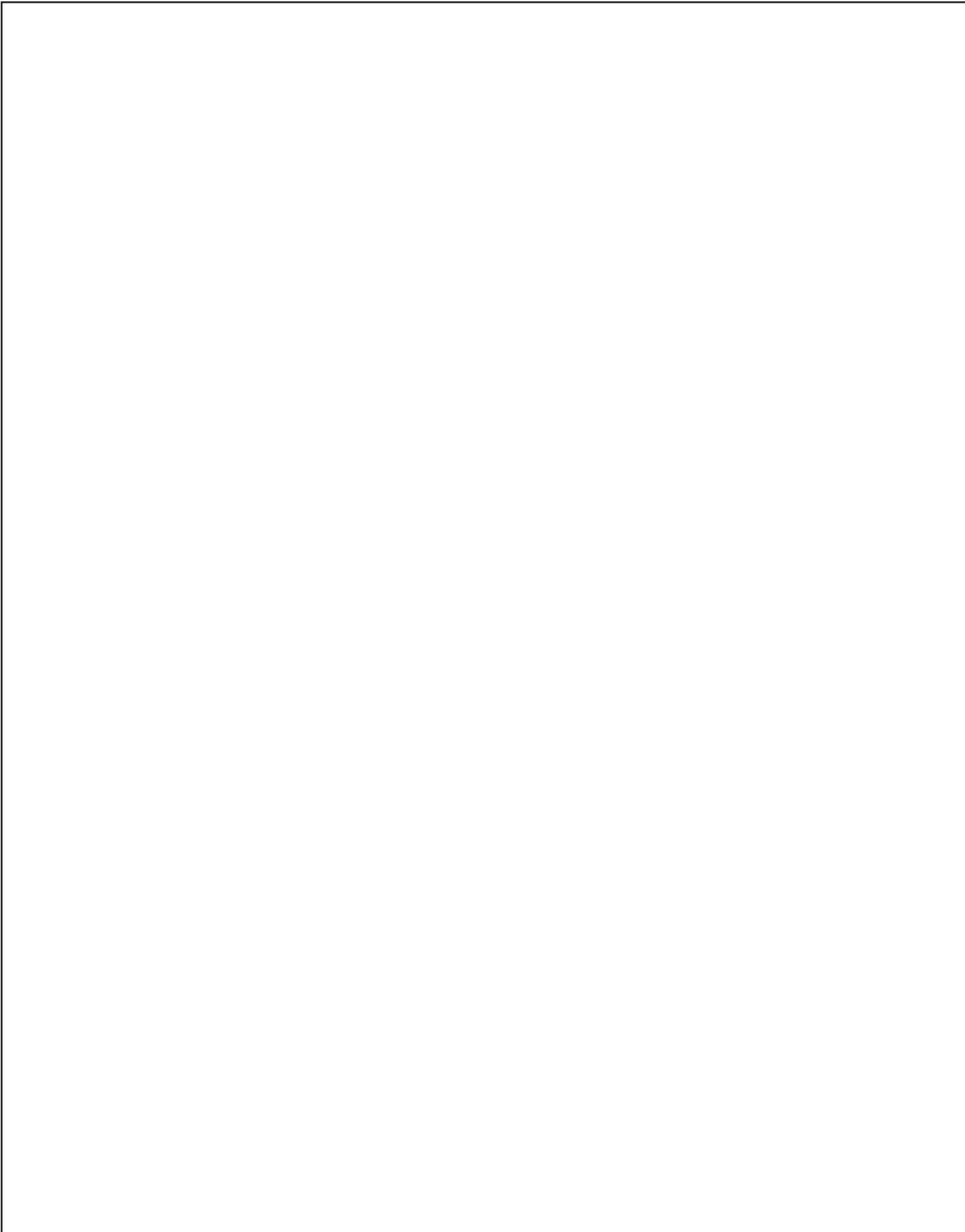
Loveridge, Scott, Thomas R. Smith, and George W. Morse, 1995, "Volunteer Visitor Business Retention and Expansion Programs," in D.W. Sears and J.N. Reid (eds.), *Rural Development Strategies*. Chicago: Nelson-Hall Publishers.

Loveridge, Scott, Thomas R. Smith, and George W. Morse, 1991, "What Does it Take to Run a Local Business Retention and Expansion Program: A Six State Survey," *Economic Development Review*, Vol. 9, No. 1, pp. 12-15.

Morse, George W., and Inhyuck Ha, 1995, "How Successful are BR&E Implementation Efforts? A Four State Example," Department of Applied Economics, University of Minnesota, Staff Paper P95-13.

Smith, Thomas R., George W. Morse and Linda M. Lobao, 1992, "Measuring Impacts of Business Retention and Expansion Visitation Programs," in *Journal of the Community Development Society*, Vol. 23. No. 1, pp. 135-139.





## ACKNOWLEDGMENTS

The ideas and experiences that shaped this set of materials came primarily from the authors' work with communities in Minnesota, Ohio and West Virginia. This grassroots experience was supplemented with three major research projects in the states of Indiana, Minnesota, Missouri, Nebraska, North Dakota, Ohio, and Wisconsin. Colleagues in these earlier research efforts included: Thomas R. Smith, Duane Olson, Leroy Hushak, Ray Lenzi, Inhyuck Ha, Christopher Allanach, Daniel Otto, James P. Miller, Ellen Hagey, John D. Rohrer, William Gillis, Robert McLaughlin, and Marion Bentley.

Pioneers in BR&E who taught us include Sam Crawford, Rudy Schnabel, Howard Wise, Dale Hileman, Paul Clappsaddle, Dan Ellerbrock, Michael Jay, Bill Grunkemeyer, Emerson Shimp, Roland Patzer, Mary Lee Gecowets, John Dete, and Eric Norland.

The officers of Business Retention and Expansion International contributed both ideas and resources for this project. In particular we wish to thank: Ursula Boatright, Arthur Brown, Judy Finley, Leroy Hushak, Thomas Ilvento, Joe Imorde, J. Robert Kelchner, Ray Lenzi, Stephen E. Miller, Duane Olsen, Jeffrey Taylor, Kathleen Tweeten, Karen Van Winkle, and Rudy Schnabel. Numerous development professionals, educators, and community leaders have contributed ideas that have strengthened this program. We thank the following people with whom we have worked directly (names of people we trained as Certified BREI Consultants are italicized):

Mark Abbott, David Amstutz, Dennis Baker, *Lorrie Ballard*, Steve Bartels, *Millie Bessey*, James Boerke, *Joel Boykin*, *Margaret Braaten*, Ken Brinson, Paul Clappsaddle, Daryl Clark, *Linda Clark*, *Garland Curtis*, *Dave Cooke*, Sheila Craig, Sam Crawford, Dan Evers, *Judy Davis*, Lee Dorsey, *Susan Engelmann*, Rodney Elmstrand, *Daniel Erkkila*, Bob Fawcett, *Judy Finley*, Joyce Fittro, *Karl Foord*, *Donna Ford*, *Michael Foulds*, Doug Graver, *Venessa Gray*, *Lee Gross*, Laura Grove, Rick Grove, Bill Grunkemeyer, Kent Gustafson, *Alison Hanham*, *Robin Hanna*, *Wayne Hansen*, *Michael Hensely*, Dale Hileman, *Renee Hink*, John Hixson, Mike Hogan, Tom Hopkins, *S. Henry Huerkamp*, Jay Jacquet, Michael Jay, Earl Joy, Ben Kenney, *Robert Kelchner*, Donald Kimmet, *Robert Koehler*, *Keith Kopischke*, Kurt Kuffner, Ken Lafontaine, Herbert Lane, Pat Landi, Neal Leimbach, Kenneth Lengieza, *Nancy Lenhart*, Mike Lloyd, *Patricia Love*, Gerald Mahan, *G. Duane Miller*, Larry Morehead, Jack Morris, *Nancy Nelson*, *Leone Ohnoutka*, *Kimberly Olson*, *Dorothy Rosemeier*, *Rich Senopole*, Ray Schindler, Mary Ann Shatto, John Smith, Len Smith, Rick Smith, *Steve Smith*, Toni Smith, *Mark Sorensen*, *Roger Steinberg*, Thomas Suter, *Elizabeth Templin*, Eric Thompson,

*Karen Tommeraasen*, John Watkins, Joy Wright, Harold Schneider, Emerson Shimp, Ken Simeral, Jack Sommers, John Ulmer, Ray Wells, Merlin Wentworth, *Evelyn Worthy*, Barbara Wurzel, *Russell Youmans*, and Bob Zetty.

Several organizations provided financial support for the development of the concepts in this series, the research that helped to test these ideas, or workshops to disseminate the information: North Central Regional Center for Rural Development, Western Rural Development Center, Northeast Regional Center for Rural Development, Southern Rural Development Center, The Ohio Cooperative Extension Service, Minnesota Cooperative Extension Service, West Virginia University Extension Service, The Aspen Institute for Humanistic Studies, USDA Extension Service, and Farm Foundation.

Several individuals from the Northeast Regional Center for Rural Development helped us to produce the actual booklets that make up *Implementing Local Business Retention and Expansion Visitation Programs*. Daryl Heasley and Eileen Zuber provided encouragement and endless technical editing, while Mark Preston and Steve Nelson completed design and layout work. Ken Pigg also assisted while acting as Director for the Northeast Center (1995).

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**George Morse** has worked with BR&E Visitation Programs for 12 years, helping many localities implement the program. From 1985 to 1989, Morse served as the director of Ohio's BR&E Program and from 1990 to 1995 he directed Minnesota's BR&E Strategies Program and is professor and extension economist at the University of Minnesota. He has written a number of popular and academic articles on BR&E and developed the certification course used by Business Retention and Expansion International (BREI). He was a founding member of BREI and served on their board of directors.

Both authors appreciate the suggestions of community leaders, development professionals, and extension educators on effective means of doing BR&E Visitation Programs. The strength of the BR&E Visitation program process outlined in these booklets stems from combining these practical tips with the lessons from the evaluation research.

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# BUSINESS RETENTION AND EXPANSION VISITATION PROGRAM

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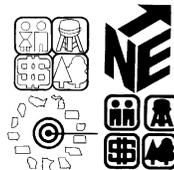
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