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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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**LOCAL LEADERSHIP  
TEAM MANUAL**

Scott Loveridge and George Morse

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## 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:

### Coordinator’s Role: Quarterback not Entire Team

Is this booklet for you? If you have read the booklet *Implementing Local Business Retention and Expansion Programs: Is It for Our Community?* and you think you might want to become a member of the local team that helps organize the program, you are in the right place. This booklet will help you better understand what the Local Leadership Team can expect to do, and how each role relates to the other members of the team.<sup>1</sup>

Before we begin to discuss the different functions of the team, we need to say a few words about the overall philosophy that must guide every action of the Leadership Team. Unlike other Business Retention and Expansion Visitation programs, the process you are engaged in is a **TEAM EFFORT**, not a **LONE RANGER** effort. While relying on a single individual may help get things done in the short run, it does little to develop a community’s capacity to handle issues as they arise. Once the individual burns out, or moves away, things go back to the way they were. As a member of the Leadership Team in this process, you will need to know a little bit about what others are doing, so the team can recover quickly if someone is lost or overwhelmed. The best way for you to know about other parts of the program is to help a little at critical points in the process. It turns out that there are specific times in the process where no one individual can do it all. Your job will be to help out at these times, or ask for help when YOU are responsible for coordinating a particular aspect of the program.

#### Coordinator as Quarterback of Team (Not the Whole Team)

To understand your role a little better, think of a football team. A quarterback can’t do the whole job—other players are needed. When it is your turn to organize part of the local BR&E Visitation effort, it is like you are serving in the role of team quarterback, NOT THE WHOLE team.

As a member of the Leadership Team, you will help provide overall direction to the local BR&E Visitation program. Each member of the team coordinates a specific part of the program. For whichever part of the program you choose to coordinate, the principle remains the same: you organize the

effort to make sure that parts are not omitted or unorganized. This means doing some of the work yourself, but not ALL of it! As outlined later in more detail, your participation on the Leadership Team brings you a number of personal benefits and rewards.

By reading this guide, you will learn the characteristics of a successful Leadership Team and the critical nature that the team plays in the BR&E Visitation process. You will become familiar with the roles of the Leadership Team, learn how these roles can contribute to the success of your program, as well as the benefits and costs of serving as a member of that team (See page 6 for an *overview* of the different functions of the Leadership Team, and a suggestion for how to organize them). Other organizational approaches may be more appropriate to your community. You may be tempted to have one person be the “everything” coordinator—this was the model used in the early days of the development of the program. However, splitting these functions among several people makes it much more feasible for volunteers to run the program.

### Benefits of Serving on Leadership Team

The benefits of serving on the Leadership Team are real and significant. They are the reason that an overwhelming majority of former coordinators recommend that other communities do the program.<sup>2</sup> The following paragraphs describe some of the potential benefits. It’s up to you to decide which of these might be the most important for you.

- **High Visibility in Successful Programs**

Being part of a highly visible, effective effort can help you build credibility for other projects. Few economic development programs provide as much opportunity for visibility and yet are practically guaranteed to be as successful as the BR&E Visitation program. While some other economic development programs can be successful, few have the high success rate of the BR&E Visitation program. There are seven or eight opportunities for the program to get news coverage, giving it high visibility (See Appendix D for sample press releases).

- **Identification of Major Issues**

If you have been in the community for a number of years, the survey results probably won’t surprise you. However, the results of the survey are still likely to help you. As one former coordinator put it: “I don’t expect to learn anything new from this. But having the numbers will help me show



other community leaders what is happening here in our town. That will make my job a lot easier.” Since few public-private partnerships in community economic development ventures can be done without the broad consent of community leaders, the BR&E Visitation program can be helpful in this fashion.

If you are new to the community or to economic development, the BR&E Visitation program is a good way to become familiar with the major issues. In addition, the data from local firms provides facts for drawing conclusions on these issues rather than just hunches or information from one or two local leaders.

- **Improved Efficiency in Contacting Firms**

Each firm visit takes a total of one and a half to two hours, counting travel and preparation time. If you tried to visit all these firms by yourself, it would take between sixty to two

hundred hours just to visit them, and you wouldn't have time for following up on individual firm problems! Also, since your state sponsor will supply a questionnaire for you to use during the firm visits, you don't have to spend time reinventing this part of the visitation process.

- **Opportunity to Learn About Local Economic Structure**

Every program does some analysis of the data collected during the firm visits. Most state programs also provide information on local trends and the economic structure of the area. This can give you a chance to assess the local economy and its best strategies for successful development.

- **Chance to Understand Local Leadership**

No matter whether you are new or experienced in a leadership role, this program will help you identify good partners

### Summary of Roles of Leadership Team BR&E Visitation Program

#### Visitation Coordinator

*Help other members of the Leadership Team*

Visit firms

Identify a researcher to analyze results\*

Select a BR&E Survey

Identify and recruit Task Force

Identify firms to be visited\*

Coordinate Practice Visits\*

Coordinate Visitation Volunteer training\*

Mail copies of surveys to the researcher\*

#### Milestone Meeting Coordinator

*Help other members of the Leadership Team*

Visit firms

Arrange (including invitations) the Task Force retreat

Arrange (including invitations) the implementation resources meeting

Arrange (including invitations) the community commencement meeting

\* If your program is working with a BR&E Consultant, generally the consultant either does these steps or provides major assistance on them.

#### Business Resources Coordinator (aka the “Red Flag” Coordinator)

*Help other members of the Leadership Team*

Visit firms

Establish contacts with state or federal agencies that can help local firms\*

Prepare localized factsheet on development programs\*

Mail thank you notes and localized factsheet to firms after the visits

Organize the “red flag review of surveys” by the Task Force

Assign a Task Force member to handle each immediate business concern

#### Media Coordinator

*Help other members of the Leadership Team*

Visit firms

Establish contacts with the media

Provide copy to media

#### Overall Coordinator (often serves as one of the above)

*Help other members of the Leadership Team*

Visit firms

Coordinate Leadership Team



for the future. If you are new, you may identify a good mentor as part of this process. If you are experienced, you may identify someone to carry on and support what you have been doing. Strong programs in economic development depend on more than one person. A broad-based team of local leaders must be involved in developing a vision of future development and reaching consensus on the steps necessary to reach this vision.

While this section has presented the benefits of serving on the Leadership Team, you will get a better picture of this if you talk with an experienced member of a BR&E Visitation Leadership Team. Your BR&E Visitation consultant or program state sponsor can provide you with a list of these individuals and tell you a little about their background and program so that you can pick ones that are most directly related to your circumstances.

### **Eligibility Requirements for Coordinators**

If you are wondering if you're eligible to serve on the Leadership Team, ask yourself the following questions: Are you well respected in the community? Can you systematically organize parts of the effort? Do you have some experience in community economic development or in leading volunteer groups? If you answered yes to any of these questions, then you're eligible. It is best if some of the members of the Leadership Team have some experience in community economic development and in leading volunteer groups. You may work in a job where you can count your work with the local BR&E Visitation program as a job assignment. If you are a retired executive, a dedicated local business person, or a community leader able to devote your time to this effort, you also are well qualified to serve on the Leadership Team.<sup>3</sup>

### **Comment on Leadership Team Organization**

The Leadership Team does not necessarily have to have four or five members, but there are some real advantages to using a team of four or five. Without a team, there is a risk of major disruptions if a single individual serving as coordinator becomes seriously ill or unexpectedly must resign due to changes at work. Without a Business Resources Coordinator, this aspect often gets short-changed, even though most programs claim that it is an extremely important aspect to achieving success. Similarly, there is a need for careful attention to the logistics of the mini-retreat and community commencement ceremony. When there is no Media

Coordinator, the media aspects seem to be left for last and often are not done. This is a big mistake because the media can be effective in drawing the community's attention and support to the process and the plans developed for improving the local business climate.

### **WHERE TO MEET?**

If possible, it's best to pick one relatively central location and meet there consistently throughout the BR&E Visitation process. Some communities prefer to rotate the meeting place, reasoning that the Leadership Team and the Task Force can spread out the commuting costs. While this may be a nice gesture, it also can create problems. First, it makes it difficult to know whether meeting equipment (overhead projectors, chalk boards, flip charts, photocopier) are available "on-site." Second, rotating the meetings means that someone must make sure everyone knows where you are meeting each time. Choose a room that is appropriate to the size of the group to be meeting. If your twenty-person Task Force meets in a room built for one hundred people, Task Force members may conclude you wanted more people but couldn't get enough interest. If you try to squeeze your twenty-person Task Force into the ten-person room that you use for Leadership Team meetings, claustrophobia is likely to crowd out creative thinking about local business problems.

## **VISITATION COORDINATOR**

### **Details in Visitation Coordinator's Manual**

If you are considering serving as the Visitation Coordinator and are wondering if you are qualified, you will need to be able to: introduce the program to local businesses, organize volunteer training, oversee mailing of information, and track the progress of volunteers in completing their visits. If you are interested in this role, you get your own booklet. It is done separately because of the detail under the section on training volunteers. Don't panic, however. If you have a BR&E Consultant, they will help you with several aspects of your role. A detailed visitation guide and discussion of how to train Volunteer Visitors are the subjects of the booklet, *Visitation Coordinator Manual*. So—we provide details here on only one aspect of your responsibilities, coordinating the practice visits. This is included in this booklet because each of the other coordinators will also visit firms and should be aware of what it involves.



## Practice Firm Visits in the Community

The local BR&E Visitation Leadership Team should participate in two practice firm visits prior to the Volunteer Visitor training. Participating in these practice visits will help the Leadership Team to answer questions volunteers may ask about firms during their visitation training. These “practice” visits double as the “real” visits. Thus, the concerns of the firms should be addressed, and the survey should be copied and sent in with the other surveys. Below are some tips on doing the practice visits:

- Choose any firm, but go to two different firms.
- Participate! All members of the Leadership Team need to visit at least one firm.

This is particularly true for team members who think that they do not need to go or who talk about having experience doing this. If their experience and biases are different than what will be recommended during the volunteer training, it is very important that they go through the visits as we will be recommending them. Then if they want to suggest differences, that is okay. But some of the “20-year experts” in economic development do not know how to do the visits correctly. It is a lot smoother to demonstrate the best way to do it than to have to debate these points in front of all the volunteers.

- Send firms a copy of the letter and the survey before the visits. Either mail or deliver the cover letter and survey to the firm. Be sure that you have the most current survey before doing this. Check with your state sponsor.
- Handle immediate follow-up from visits. The practice visits are the official visits for these firms. The Leadership Team needs to handle the follow-up in the same fashion as the Task Force would later. Every firm is important!
- To provide feedback for your BR&E Consultant and for the Volunteer Visitors, list your reactions to the practice visits on the sheet in Appendix E.

## BUSINESS RESOURCES COORDINATOR

What do you need to be a good Business Resources Coordinator? People skills are important. Knowledge of state and federal programs to help business also can be an asset. If you become the Business Resources Coordinator, your job will be to organize immediate follow-up to individual business concerns. The long-term success of a BR&E Visitation program depends largely on the effectiveness of handling this follow-up, because tangible early successes help keep the team energized for carrying out the long-range plans for community action. The individual business concerns are often called “red flag issues,” because of their important or urgent nature. The role and responsibilities of the Business Resources Coordinator, Leadership Team, and Task Force to follow-up on these immediate concerns are outlined in this section. Immediate follow-up work can be very tedious and time-consuming if you tackle it alone. The best follow-up work is accomplished in a cooperative fashion. If you are the Business Resources Coordinator, you have the following responsibilities:

- *Help other members of the Leadership Team.*
- Visit Firms.
- Establish contacts with state or federal agencies that can help local firms.
- Prepare localized factsheet on development programs.
- Organize the “red flag review of surveys” by the Task Force.
- Mail thank you notes and the localized factsheets to firms after the visits.
- Assign a Task Force member to handle each immediate business concern.

What is actually needed for each of the above items? What follows is more detail.

### ***Help Other Members of the Leadership Team***

As a member of the Leadership Team, you must attend Leadership Team meetings regularly and familiarize yourself with the roles of other Leadership Team members. Naturally, as part of the Leadership Team, you also serve on the Task Force. Reading this booklet will provide that information, so you can help others when they need it.





## Visit Firms

All Leadership Team members visit between one to three firms.

## Contacts with State or Federal Agencies

Effective BR&E Visitation follow-up often requires help from state and/or federal agencies. Contact your state BR&E sponsor, BREI Certified Consultant, or state development agency for a “starter” list of programs. It really helps if some development program staff are familiar with the local BR&E Visitation program. You can split up the names and ask Task Force members to contact the development program staff and briefly explain the local BR&E Visitation process. Just how you split up the names is unimportant. Completing the calls is extremely important.

## Localized Factsheets on State and Federal Programs

Many BR&E Visitation programs have prepared short (one-page) factsheets with the names and telephone numbers of key state and federal program contacts. Some factsheets also give a very short description of the program. Don't let this aspect become overwhelming so that nothing is available. Often state development agencies can help you with this. Your state sponsor also should be able to provide a list of state and federal programs that can meet some of the needs identified by individual firms. In some states, this information is provided in a format that Volunteer Visitors can use during firm visits.

## Mailing Thank You Notes and Localized Factsheets

The need to mail thank you notes to firms is obvious, and it provides an opportunity to send the factsheets to them. The Visitation Coordinator should be able to give you a list of names and addresses of firms visited. It is best to do this mailing within one or two weeks of the firm visits. This means the factsheet must be ready before the volunteer training.

## Organizing “Red Flag” Review of Surveys

After ten to fifteen surveys have been returned to the Visitation Coordinator, the entire Task Force should meet and review each of the surveys. As the Business Resources Coordinator, you will organize these meetings. The purpose of this review is to identify specific ways that the BR&E Visitation program can provide assistance to each firm and to assign the responsibility to one or more of the Task Force members for working with each firm. Typically, it takes two, three, or more meetings to complete the survey review process, depending on the number of interviews completed.<sup>4</sup>

If you want tangible results from your program, this is probably the most important step in the process. It is at this stage that you address the individual concerns of the firms. Also, you will gain a much better understanding of your Task Force members and local government officials.

The process used for review is as follows:

1. The Business Resources Coordinator photocopies the surveys, but omits the cover sheets with the firms' names and the first page, which includes the employment and products produced. **If this information is not removed, the review process violates the confidentiality promised to each of the firms during the visits.**
2. At the meeting, divide the Task Force into small groups of three each. Have each group review three surveys, and be sure that each person in the group reads all three surveys. Next, have the small groups complete the “Follow-up Worksheets,” which outline the nature of the problems, suggested follow up, and the resource person who might be able to handle this. An example of a “Red Flag Follow-up Worksheet” is included in Appendix A. Your state sponsor may already have a similar worksheet, or you may need to modify the form to match your state's questionnaire.
3. The next step is to reconvene the entire Task Force, and have the small groups report their suggestions to it. The Task Force then either accepts or modifies the ideas suggested for follow up.

The review process helps address the immediate concerns of local firms, and it also helps local leaders understand the long-term major concerns of firms. These long-term concerns are addressed formally after the data are fully tabulated by your state sponsor. By reviewing the individual surveys, the Task Force gains a stronger grasp of the



nature of these concerns. This makes it easier for them to use the fifty- to sixty-page report of results later in the process. It also gives them time to think about various options for handling the problems that firms mention.

In early programs, the Business Resources Coordinator summarized the surveys and then shared the summarized comments with Task Force members. You should avoid this. This approach is not as good as the direct review. First, it takes more time for the coordinator to complete. Second, the Coordinator could be blamed for a message that other members of the Task Force do not agree with. Third, Task Force members can claim that the message reflects the biases and interpretation of the Coordinator. Fourth, understanding a response to a particular question often is easier if the reviewer can examine the entire questionnaire.

Groups that have used the full survey review process have been very satisfied with it. A primary benefit is the complete ownership of the results of the survey by the Task Force. The Task Force also learns to work together.

#### **Assign Task Force Members to Follow-up**

In some groups, the Business Resource Coordinator makes these decisions and asks people. In other groups, the Leadership Team collectively decides. In other cases, it is done by the entire Task Force or on a volunteer basis, but the Business Resource Coordinator keeps track of who is doing what.

## **MILESTONE MEETING COORDINATOR**

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If you become the Milestone Meeting Coordinator, you will help the community organize itself to decide which long-range issues raised in the BR&E Visitation survey can be changed by community action. Once these priorities are set, you will help facilitate accomplishing the goals. What does it take to be an effective Milestone Meeting Coordinator? If you have some experience in planning large events, that can be helpful. It also is good if you can help groups of people come to a consensus on what needs to be done. The specific things that need to be organized follow:

- *Help other members of the Task Force.*
- Visit firms.
- Arrange (including written invitations) for the Task Force retreat.
- Arrange for the implementation resources meeting.
- Arrange (including invitations) for the Community Commencement Meeting.

## **Help Other Members of the Leadership Team**

As a member of the Leadership Team, you must attend Leadership Team meetings regularly and familiarize yourself with the roles of other Leadership Team members. Naturally, as part of the Leadership Team, you also serve on the Task Force. Reading this booklet will provide that information, so you can help others when they need it.

## **Visit Firms**

All Leadership Team members visit two firms as part of the practice visits and often visit another one to three firms during the visitation phase.

## **Arrange the Task Force Retreat**

One of the goals of the program is to develop a strategic action plan<sup>5</sup>, which outlines the major strategies and projects that the community will use to encourage the survival and growth of their existing businesses. In the “red flag” stage, your Task Force looked at the problems of individual firms. Here you are trying to set priorities on four to six major projects that can address the concerns of a large number of businesses.

### **Retreat Agenda**

This meeting (or retreat) is held after your state sponsor has completed the tabulation of the survey results. Generally, the survey results are arranged into three or four common themes or strategies (concerns with labor recruitment and quality, ways to remain cost competitive, community service issues). Discussion of each theme uses the following format:

1. Review the firm survey results by the researcher.
2. Small groups discuss potential projects to react to firm concerns.
3. Present suggested projects by researcher.
4. Discuss suggestions offered by the researcher and small groups.
5. Nominate and discuss priority projects.
6. Vote for priority projects.
7. Select one to three people to head up projects.

This format provides an opportunity for the group to both learn about the research results and to discuss them in detail.



For each potential strategy, the researcher makes a short presentation of the research results, which relate to that strategy, first describing the nature of the strategy. Then the group will be split into small groups (three to five people each) to discuss the suggested projects and to invent new ones. Then each small group will nominate one project for the final report. At this stage, all nominations will be recorded on flip charts, but no decisions will be made.

After all strategies are covered in this fashion, the group has to decide whether to vote on their final choices at this meeting or to wait until another meeting. There are advantages and disadvantages of either choice. Waiting gives you time to get more people on board, but it also can cause you to lose momentum. After some discussion, it's best to take a secret ballot on the approach to use. If the group decides to vote now, each person gets three sticky dots (little round self-adhesive dots available in most business supply stores). Each person then chooses their top three priority projects by placing a dot next to them. The four to six projects with the greatest number of votes are adopted as priorities. It generally takes about four hours (plus any meal time) to complete this process, if you do it in one meeting. See next column for a suggested agenda. You may want to take extra copies of the section "Who Will Take Charge of Each Project?" with you to the meeting. It's important that people take charge of the various projects that are adopted. Using the form provided in Appendix B can help to organize the committee's initial efforts.<sup>6</sup>

**Who Will Take Charge of Each Project?**

In setting priorities for future BR&E Visitation projects, it is important to consider who will do the work. Research has shown that written plans from BR&E Visitation programs that include not only who helped develop the project, but **who will work on each specific project** are more likely to experience success. This is because people will agree that many things ought to be done, as long as someone else is willing to do it! An important ingredient to success is to choose only those projects that a critical mass of local leaders have agreed to help implement.

None of the priority projects will happen if someone from the BR&E Visitation Task Force isn't able to provide leadership to make it happen. At least two or three people should be on a subcommittee to organize the project over the next four to six months. The committee will often invite another three to six people from outside the BR&E Visitation effort to help them, and that committee may invite others to become involved at some stage. It depends on the project. However, someone has to call the first meeting. You can't expect people who aren't at this retreat to do it. If

no one from the Task Force agrees to call the first meeting, you might want to remove this as a priority item.

Many groups set the date for a Task Force meeting after the community meeting as a time when these small groups will give a progress report and seek additional help from the Task Force.

**Suggested Agenda for BR&E Task Force Retreat**

- 9:30 a.m. .... Registration and coffee<sup>7</sup>
- 10:00 ..... Welcome Task Force and introduce program  
(coordinator)
- 10:15 ..... Review of research results from firm visits  
and presentation of strategy one (researcher)
- 10:30 ..... In small groups, discuss suggested projects
- 10:45 ..... Nominate projects related to this strategy
- 11:00 ..... Review research results for strategy two  
(researcher)
- 11:15 ..... Small group discussion of suggested projects
- 11:30 ..... Nomination of projects related to this strategy
- 11:45 ..... Lunch break
- 12:30 p.m. .... Review of research results for strategy three  
(researcher)
- 12:45 ..... In small groups, discuss suggested projects
- 1:00 ..... Nominate projects related to this strategy
- 1:30 ..... Review research results for strategy four  
(researcher)
- 1:45 ..... In small groups, discuss suggested projects
- 2:00 ..... Nominate projects related to this strategy
- 2:15 ..... Final discussion and voting
- 2:45 ..... Set date for Community Commencement Meeting
- 3:00 ..... Adjourn

**Good Attendance at the Retreat**

BR&E Visitation Task Forces don't have legislative authority or large budgets. Their power comes from the members of the Task Force, which includes people who have influence in a large number of organizations that do have budgets and legal authority to impact economic development. Yet, this power can only be realized if the group reaches a consensus on what ought to be done in economic development. If the attendance at the retreat is low, it is not possible to credibly claim that the projects represent a consensus of influential community leaders.



### One-day Retreat Versus Two Short Meetings

Why hold a mini-retreat rather than schedule two or three shorter meetings? In the past, some Task Forces have held two or three two-hour meetings to review the research results and to set priorities. While these meetings have resulted in reports in every case, there has been wide variation in the implementation of these projects. It appears that one of the major reasons for the differences in implementation has been the degree to which the community leaders had a shared understanding of the nature of the concerns. When a shared understanding existed among the leaders prior to the meetings, this format seems to have been successful. When it didn't, it resulted in a report but often with little implementation.

But doesn't the research report provide the data needed for the group to reach a consensus on the nature of the concerns? Yes, it does. However, the three-meeting format often resulted in a thirty to fifty percent variation of participants in them. Thus, a shifting attendance can make it impossible to reach a shared consensus. Given the breadth of participation, trying to adjust the dates of the second and third meetings to meet the schedules of participants is very frustrating and often drags it out so much that it kills enthusiasm. The solution is to hold a one-day "retreat" (four hours plus meal time) for the entire Task Force.

The worst outcome is to have someone who did not attend the retreat be listed as an author of the recommendations and then to have that person publicly disavow the projects at the community commencement meeting.

#### Tips for High Attendance at the Retreat.

##### Get a high response rate on the surveys

If the response rate is low, Task Force members may feel guilty about not doing a better job. This guilt will discourage some from participating in further stages of the program. While you want to put pressure on the Task Force and volunteers to do their visits, be careful not to overdo this and inadvertently harm the rest of your program.

##### After the volunteer training, hold monthly Task Force meetings until the retreat

Several meetings are necessary to deal with "red flag" issues. It's useful to have presentations and discussions on specific economic development trends, issues, or programs during the retreat. However, never hold a meeting for the sake of holding one.

#### Select the date and time very carefully so it doesn't conflict with other community or church events

For best results have the Task Force help pick the date. Be sure that the research will be ready before doing this. If you can't get the Task Force together to set the date, use the Leadership Team to check out possibilities.

#### Send written notices and reminders to the Task Force.

#### Establish a telephone tree for calling the Task Force two or three days prior to the event

This last suggestion seems like a lot of work, and it is. Yet, it's probably the most effective way to ensure attendance. If you don't get good attendance at this stage, the rest of the effort is a waste of time.

#### What Kinds of Projects Work?

As the person organizing the Task Force retreat, you may be asked, "What kinds of projects work?" What follows gives you some guidelines for answering the question. A 1993 survey of local BR&E Visitation program Leadership Team members in four states asked for information on what projects had been adopted and about the overall impacts of the program. Using statistical tests on the survey results, Allanach identified five broad types of projects that are strongly associated with positive program outcomes.<sup>8</sup> Table 1 lists the types of projects that are associated with strong programs.

**Table 1:  
BR&E Projects Associated with  
Successful Local BR&E Visitation Programs.**

- 
- Inform Politicians of Business Concerns
  - Start a Business/Education Partnership
  - Create a Group to Work on Local Development Issues
  - Inform Businesses about Development Programs
  - Continue BR&E Visitation Program
- 

It should be emphasized that Table 1 is not a recipe, only an indicator of what has tended to be successful for other communities. It is not necessarily the case that something that tends to work for other communities will work for your community. Each community has unique strengths and needs. It is the job of the Task Force to consider the unique

aspects of the community’s situation together with the above information in developing an action plan. It also is quite likely that your community will develop strategies that do not fall under any of the broad categories listed in Table 1.

### Arrange the Implementation Resources Meeting<sup>9</sup>

Most BR&E Visitation Task Forces can’t afford to reinvent projects or programs that other groups are already doing—even if the existing projects do not really address the concerns of the firms visited by your program. Further, if your Task Force starts a project that another group already feels it’s doing or should be doing, often energy is wasted on protecting “turf” rather than serving firms. A way around these two problems is to hold an “Implementation Resources Meeting.” At the end of the retreat, ask Task Force members to identify people or agencies that might be working on each of the selected projects. Then invite a representative from each agency to the “Implementation Resources Meeting.”

Set up a panel of these outside resource people for each of the priority projects and ask each person **ahead of time** to address the following three questions:

1. What is already being done in this project/topic?
2. To what extent are current programs reaching the firms visited?
3. How could your agency/organization and our group collaborate on expanding or starting this type of project to better reach our firms?

Ask each agency to prepare a brief (no more than four minutes for all three questions) summary on these questions. Each panel might be given about twenty minutes to address the above questions. If you have more than three or four priority projects, you might need to meet more than once.

Invite all of your Task Force members to this meeting—use a telephone tree to assign Leadership Team members people to call and invite. Then follow this call with a written invitation.

At the end of the session, identify at least two Task Force members to be on the implementation team for each project. And identify the agencies or groups that might wish to be on them also.

If you live in a small town, you might think that this idea will only work in more urbanized areas. Wrong! While you

might not have a lot of the agencies directly in your community, there are many organizations that have multi-county areas for which they are responsible. It pays to identify these agencies and invite them to this meeting. Often your state department of development representatives, regional economic development professionals from the utilities, or the extension service can help you identify these resource people.

While this step slows you down in getting to the community commencement meeting where you announce your plans, it speeds up implementation and achievement of long-term goals.

### Arrange the Community Commencement Meeting

During the community commencement meeting, the survey findings and projects are presented. This meeting provides the opportunity for the community to recognize the “end” of the BR&E Visitation program and the “beginning” of new economic development initiatives. Even though the visitation stage of your BR&E Visitation program has concluded, you have just gathered a detailed database about your industry and have just announced future BR&E projects for economic development. The community commencement meeting, therefore, should signify the start of local initiatives to improve your business climate, not the end of your economic development efforts. This **commencement** meeting marks the end of the firm visitation and planning stage and also marks the beginning of the implementation stage (See page 14 for an agenda for the meeting and tips on how to increase community attendance).



### **Suggested Agenda for the Community Commencement Meeting**

The suggested agenda described below seems most effective. It was developed after considerable trial and error, and it reflects the best elements of several BR&E programs.<sup>10</sup>

1. Introduce program. (Coordinator - 10 minutes)
2. Review the program's purpose and history. (Leadership Team - 5 minutes)
3. Give Testimonials (business representatives) and/or program accomplishments (Coordinator - 10 minutes)
4. Present strategy one (Task Force member A - 10 minutes)
  - a. Review concept of strategy.
  - b. Present highlights of survey results.
  - c. Summarize the Task Force priority projects.
5. Present strategy two (Task Force member B - 10 minutes)
6. Present strategy three (Task Force member C - 10 minutes)
7. Closing remarks (Coordinator)

### **Method for Presenting BR&E Strategies**

This is the most important part of the meeting—the main reason for it. The approach has been used in over fifty programs and has proven very successful and popular. Select one Task Force member (or Leadership Team member) to present each of the strategies in your report. Have the Task Force member present (five to ten minutes) the summary report, closely covering three topics:

- a. The overall concept of the strategy.
- b. The survey results related to that strategy.
- c. The projects recommended by the Task Force related to that strategy.

Prepare from one to three overhead transparencies on the above points. Be sure the print is legible and large enough for everyone to see! An example is included in Appendix C.

The individuals selected to present the strategies should be influential in the community, have good public speaking skills, and be willing to report the projects selected by the group rather than their own personal agendas. Now and then a person doing this gets original, giving his/her own personal recommendations rather than, or in addition to, those of the Task Force. This is to be discouraged, since it's confusing and distracting from the projects selected by consensus during the Task Force retreat.

By using this approach, you will demonstrate to the audience that the projects belong to the Task Force and not to the researchers or state sponsor. In fact, the process of preparing and giving this presentation increases the capacity of local leaders to promote their projects. It also is an opportunity to recognize key local leaders in the program.

### **Improving Community Commencement Attendance**

Some communities may not be able to follow all of these suggestions because they may have fewer resources than others; nonetheless, the following are strongly recommended:

- **Organize and plan the commencement collectively.** The Leadership Team, consultant, and Task Force members must decide as a group the specifics for the community commencement meeting (date, time, place, format, and audience).
- **Make the commencement meeting social.** Have the commencement meeting in a banquet room or hotel. Send out invitations with RSVPs. Serve refreshments or a meal. Some groups have hosted dinners, but this is not essential. Allow time for mingling and socializing. Although it may seem that the social aspect of the occasion is being emphasized more than the content, it really isn't. It has been an observation that if you want good attendance and attentive guests, you need to make the meeting more than just a meeting to review results—you need to make it a social event.
- **Get media coverage.** Newspaper articles, radio spots, and television coverage before the meeting will help increase your attendance because the media coverage gives the event more credibility and importance than it would receive otherwise. Media coverage after the event, however, is probably more likely since there will be more "news" to report. Encourage "prior" coverage by inviting media representatives to the commencement meeting.
- **Do not invite a guest speaker or include an unrelated controversial topic which will overshadow the purpose of the ceremony, which is reporting the program's findings.** One group invited a well-known U.S. senatorial candidate to speak at their ceremony as a means of drawing a crowd and media attention. They got a crowd, the media, and a campaign speech. Oh yes; he did congratulate them on doing BR&E, but no one



heard about the results of the survey or their recommendations.

- **Hold a separate community commencement meeting just for the final report of the BR&E Visitation program, thereby emphasizing it—if this is not practical, it may work to hold the BR&E presentation in conjunction with another organization’s meeting (for example, the Rotary Club).** This arrangement guarantees an audience, but it may also present some difficulties because of time limits for guest speakers, other items on the agenda, or attendance restrictions (members only). Therefore, it is important to obtain adequate time for the BR&E presentation (about an hour) and to make certain that the meeting will be open to all interested persons. If these two adjustments cannot be made, don’t hold it with another group.
- **Even though the industries will receive an invitation, have the volunteers call the industries they visited to make a more personalized invitation.** This adds a personal touch to the meeting and increases attendance.
- **Do not present the findings and recommendations prematurely.** It takes at least one month between the Task Force “mini-retreat” and the Community Commencement Meeting to finalize and print the summary with the recommendations. During this month, some communities have wanted to simply share the findings and recommendations before the reports are ready. This approach weakens the purpose of the community meeting. If guests attend a similar presentation but do not receive a report, most of the information they hear will not be retained, and their enthusiasm for the projects recommended will wane. Providing them with a summary during the ceremony will convey the message of community development more effectively.

## **MEDIA COORDINATOR**

What is needed to be a good Media Coordinator? If you have good people skills, you can do this job. You don’t need to be a good writer or work for a news organization, if you establish good contacts with media people and explain the program enthusiastically. To be effective, the Media Coordinator must be a full participant in Leadership Team activities, so that media coverage accurately reflects the

program’s progress. Media coverage is often most effective if you and other members of the Task Force take time to establish personal relationships with the news organizations that are targeted to provide coverage of the local BR&E Visitation events. Inviting news organizations to participate in the various events can help you get more effective coverage than “after the fact” notification. If you are the Media Coordinator, you have the following responsibilities:

- *Help other members of the Leadership Team.*
- Visit Firms.
- Establish contacts with the media.
- Provide copy to media.

What is actually needed for each of the above items? What follows is more detail.

### ***Help Other Members of the Leadership Team***

As a member of the Leadership Team, you must attend Leadership Team meetings regularly and familiarize yourself with the roles of other Leadership Team members. Reading this booklet will provide that information, so you can help others when they need it. Naturally, each coordinator also serves on the Task Force.

### **Visit Firms**

All coordinators do at least two practice visits and usually do two or three additional visits during the visitation stage.

### **Establish Contacts with the Media**

The Media Coordinator makes personal contacts with the local media to explain the program. Or, as with other coordinators, this one might arrange for someone else to make these contacts. In either case, the media is kept up-to-date on the progress of the program and invited to attend any local BR&E events. Often the Media Coordinator arranges media interviews for the rest of the Leadership Team.

### **Provide Copy to Media and Leads to Radio & TV**

There are at least eight stages in the BR&E Visitation process when the media might be interested in the program.



At these stages, news releases can be written. If you wish, you can prepare your own news release. Examples of press releases the Media Coordinator might prepare and distribute are included in Appendix D of this booklet. Newspaper coverage is not the only source of publicity for a BR&E Visitation program. Radio interviews, television coverage, newsletters, and information bulletins also are excellent methods of informing the community and state about your community's work with local businesses and efforts to promote economic development.

## **OVERALL COORDINATOR**

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### **Selection of Overall Coordinator**

The Overall Coordinator is elected by the other four coordinators at the end of the orientation program. In many cases, the Overall Coordinator also will serve as one of the other coordinators. However, in some programs, the coordinators will wish to invite another person for this role.

### ***Help Other Members of the Leadership Team***

As a member of the Leadership Team, you must attend Leadership Team meetings regularly and familiarize yourself with the roles of other Leadership Team members. Reading this booklet will provide that information, so you can help others when they need it. Naturally, each coordinator also serves on the Task Force.

### **Visit Firms**

As a member of the Leadership Team, you also go on practice visits as well as visit firms after the volunteer training.

### **Convene Leadership Team Meetings**

This person is responsible for convening the Leadership Team for their meetings and for announcing the Task Force meetings.

### **Spokesperson for the Leadership Team**

The Overall Coordinator sometimes serves as the project spokesman and often is the primary contact for the BR&E Consultant.

## **TIPS ON GETTING PROJECTS IMPLEMENTED**

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What is the point of doing all of this work and setting priorities on projects to improve the local business climate if few of them are implemented? If this happens, it would have been better to have gone fishing or something else enjoyable. This isn't to say that every last project must be fully implemented for a BR&E Visitation Program to be successful. Many very successful people (and programs) set goals that are very high. Yet, if few or none of the projects are implemented, then clearly the BR&E Visitation program is a failure. Here are some tips from both experience and a recent research project on how to ensure greater success in implementation.

### **Follow Sound Strategic Planning Processes**

A study of ninety-one BR&E Visitation programs in four states found that those programs that used basic strategic planning guidelines had more success in their implementation than those that did not.<sup>11</sup> If your project follows the approaches outlined in these booklets, your odds of successfully implementing your projects improves. Table 2 summarizes the results of statistical tests on the relationship between the degree of implementation and strategic planning characteristics.<sup>12</sup>





**Table 2:  
Factors Influencing the Degree of BR&E Project  
Implementation**

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Adoption of strategic planning methods in the BR&E Visitation Program, (i.e. it validated the methods used in these booklets)

Listing of the individuals who will take responsibility for implementation in the BR&E public reports

Length of time since the completion of the report

Participation in the implementation meetings after the report is prepared

Adequate budget (average was \$2,500)

Full-time professionals in some community organization who continued to work on implementation (average was 1.1 professionals per program).

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Specific tips for improving your odds of implementing your priority projects follow.

**From the beginning, stress that the BR&E Visitation program is a two- or three-year project.**

In some of the older programs, the BR&E Visitation program was described as a six- to nine-month project. Thus, Task Force members expected they could resign after the community commencement ceremony. Yet, other groups will seldom implement a plan that they did not have a hand in developing. At the end of the planning phase, there may be some shifting of Task Force members, but if the initial group completely disbands, not much will be implemented.

**In the BR&E Retreat, ask Task Force Members to indicate one of the projects on which they will work.**

After voting for priority projects, ask each Task Force member to write their name beside one of the high priority projects on which they are willing to work over the next couple of years. Then have all those on the same project get together and develop an action plan. Since they won't have time to complete the plan at the meeting, ask each group to designate a "convener" of the next meeting and also a "note taker." This approach not only gets some tangible plans underway it clearly sends the message that this group is responsible for the implementation.

**Set up a special implementation panel.**

Some BR&E Task Forces set up a smaller panel that takes explicit responsibility for the implementation. Often they will involve other local leaders as needed.

**Meet at least quarterly to monitor implementation.**

If the BR&E Visitation Task Force does not meet at least quarterly to review the progress on their projects, there is unlikely to be significant progress. While many of the projects can and should be spun off to other groups, the Task Force needs to keep an eye on them. Further, the Task Force represents a much broader-based group than most others in the community. Continued dialogue among the Task Force members can facilitate communications among the local groups represented on the Task Force.

**Set date for first quarterly meeting before community commencement meeting.**

Groups that set the date for the first meeting tend to actually hold the meeting. Those that don't have a meeting date set often never have their first one.

**Plan each quarterly meeting well.**

Community leaders don't need more useless meetings. If the first one is poorly planned, it will hurt attendance at the rest. If it is well done and the committees have been given enough notice so they are prepared, enthusiasm and results will follow.

**Contact committee between quarterly meeting of Task Force.**

If the committees don't meet periodically between the quarterly meetings, little will happen at these quarterly meetings. Often the lack of progress between meetings results in the group feeling powerless to change things and attendance will drop off, but who will make the contacts between meetings? The Leadership Team.

**Elect a New Leadership Team at the first quarterly meeting.**

While you and the others on the Leadership Team might wish to continue in this role for three years, you also might not. It is suggested that only half of the Leadership Team be replaced at the first quarterly meeting, i.e. add two new members. It is better not to shift the entire team since this will lead to problems in continuity.

**Keep in Touch with Your State Sponsor.**

As your implementation plans go forward, you will likely come across some unexpected hurdles. Use your BR&E Consultant and/or State Sponsor as a kind of help line to identify other groups in the state that have successfully overcome similar problems.

**Invite regional and state agency personnel to your quarterly meetings.**

Communities with the best track records in economic development are shameless in taking full advantage of the various development programs offered by state and federal governments or by educational institutions. Invite representatives of these groups to your quarterly meetings so they can learn about your BR&E projects. Often they might be able to volunteer help in ways you would never dream of even asking for. Also ask them to describe one or two of their programs. Once you learn of their programs, you might see connections to your priority projects that you were simply unaware of previously.

**Distribute one-page outline of projects often.**

Most projects have a fifty-page research report and an eight-page summary. Few people read either of these often. Some of the most effective projects have condensed it to one page that outlines the priority projects and people on the committees. This one-page summary can be distributed early and often. It serves both as a reminder of the projects and who to contact if you can help or have an idea.<sup>13</sup>

**Keep publicizing your program.**

As you implement a project, let the world know about it. This rewards the volunteers who put in time and often helps establish your community as a place “on-the-go.”



## APPENDIX A: RED FLAG FOLLOW-UP WORKSHEET

Survey ID Number: \_\_\_\_\_

Date of Review: \_\_\_\_\_

### Red Flag Follow-Up Worksheet Business Retention and Expansion Visitation Program

<p>MOVING/CLOSING?</p> <p>Is the firm moving or closing? When? Why?</p> <p>Can anything be done to change this?</p> <p>See page __, question __</p>	<p>What is the problem? What is your suggestion for handling it? How urgent is it?</p>	<p>What official or agency should look into it? Which BR&amp;E Visitation Task Force member should take charge of this issue?*</p>
<p>EXPANSION?</p> <p>Can the Task Force remove any local bottlenecks?</p> <p>See page __, questions _____</p>		
<p>PUBLIC SERVICES</p> <p>Can the Task Force help improve the important ones with weaknesses?</p> <p>See page __, questions _____</p>		

\* While one Task Force member needs to make the initial contacts and monitor the assistance provided by other agencies and officials, the BR&E Visitation Task Force members do not need to do all the follow-up on their own. The most successful groups take full advantage of those state and federal programs that can help local firms.

(Special Note: Before using this worksheet, you should fill in the page and question numbers that refer to each issue.)



## Red Flag Follow-Up Worksheet (Continued)

### Business Retention and Expansion Visitation Program

<p>INFORMATION REQUESTS</p> <p>Can the Task Force steer the firm to the relevant agency or official?</p> <p>See page __, question __</p>	<p>What is the problem?          What is your suggestion for handling it?          How urgent is it?</p>	<p>What official or agency should look into it? Which BR&amp;E Visitation Task Force member should take charge of this issue?*</p>
<p>LABOR CONCERNS</p> <p>Who can assist on labor concerns?</p> <p>See page __, questions _____</p>		
<p>PROBLEMS WITH STATE/FEDERAL PROGRAMS</p> <p>Can the Task Force help improve the important ones with weaknesses?</p> <p>See page __, questions _____</p>		
<p>OTHER CONCERNS</p> <p>Review entire survey for “red flags” that need urgent attention.</p>		



## APPENDIX B: IMPLEMENTATION WORKSHEET (Example from Ritchie County, WV)

### Action Plan for Attaining Goals

A short title for this activity is: Employee Training/Education Date: 10/25/95

The long-term goal for this activity is: To help improve the basic skills of the workforce in Ritchie County

The short-term goal for this activity is: To communicate the needs of the business community with school administrators

The expected outcome of the activity is: Improved communication and cooperation between schools and businesses concerning the basic needed skills

The start date is: November 1995

The completion date is: ongoing, repeated process

### The What, Who, and When of This Activity

What (task to be done)	Who from Task Force?	Who Else?	When (to be completed)
(1) A decision and recommendation of which basic skills needed to be improved following discussions with county businesses, classroom teachers, school improvement counselors	John Jones Paula Smith	A committee representing the Chamber of Commerce, the Economic Development Authority and interested community partners	2-4 months
(2) Make a presentation and report to School Board and other community partners	Committee chair and members		upon completion of Task #1
(3) Help implement a short-term training program for existing employees	School teachers/non-credit program personnel provide training		winter or spring 1996



## APPENDIX B (Continued)

Resource Requirements and Commitments		
Resources Needed	Resources Promised	Potential Resources
(labor, \$, consultants, equipment, etc.)	(what resource, who will supply, when supplied)	(type of resource, source)
community representatives of various interest groups		Community Economic Development grant money
funds to reimburse teachers		
resource expertise of university non-credit program—Dave Winger		

Participants in this strategy:

Tom McCullough, Lewis Cottrill, Shorty Bumgardner, Carl Alkire, Doug Jackson, and Dick Hartley (facilitator)

Other potential members:

Jean Westfall and Ray Jones.

Are there other groups that might be working on this? If so, which ones?

## **APPENDIX C: SAMPLE OVERHEAD FOR COMMUNITY COMMENCEMENT MEETING**

(example drawn from Nobles County, Minnesota)

# **Strategy Three: Develop Initiatives to Support Existing Business, Service, and Manufacturing Firms**

## **Overview**

60 -80% Net growth due to existing firms

Industrial recruitment depends on happy existing firms

## **Key Survey Findings**

80% of firms say Nobles County is excellent to good place  
to do business

One larger firm considering moving and 47 expanding

Expected net gain in jobs = 290

## **Task Force Recommendations**

- 1) COUNTYWIDE MANUFACTURER'S NETWORK
- 2) COUNTYWIDE MARKETING STRATEGY
- 3) CONTINUE BR&E EMPHASIS
- 4) MAINTAIN BALANCED ECONOMIC  
DEVELOPMENT PROGRAM



## APPENDIX D: SAMPLE PRESS RELEASES

### NEWS RELEASE: APPLYING FOR THE PROGRAM

*Instructions: Simply fill in names of local leaders, cities, etc. Revise the rest of the text as necessary.*

(sponsoring agency) has applied for acceptance to a state economic development program, according to (name), president of (sponsoring agency). The program, the Business Retention and Expansion Visitation Program, is designed to stimulate economic development and growth by assisting existing industry. The program is sponsored by the (name of state sponsor).

“Helping our existing firms is the primary objective of the program. This program differs from other business retention and expansion efforts in that the (name of sponsor) provides extensive technical and research assistance. Other communities have had very good results with this program,” said (coordinator), of (city). If the application is accepted, the program will begin in (month) according to (coordinator). He/she expects to hear from the research team in a few weeks.

“While our community has done a Business Retention and Expansion Program in (year), we have never done one as large and with as much research and technical assistance as this one. Before applying for this program we talked to community leaders in several other areas that have used this particular approach to business retention and expansion. They were very positive about the results,” said (member of Leadership Team).

For example, in (name of community) the BR&E Visitation Program lead to:  
(outline the specific example of success based on the telephone interviews).

Another example of the benefits of this approach to business retention and expansion was given by leaders in (name of county or region). One of their successes was (outline the success). According to (name of BR&E state sponsor) before a community can assist its existing industry it must identify the industry’s needs, concerns, and problems. Under the BR&E Visitation, local volunteers visit businesses and gather this information. The local leaders running this program then try to solve those problems or better meet those needs identified by the businesses. “A key aspect of this program is confidentiality,” according to (extension educator). “We do not publish any information on individual firms. The program is very careful about this confidentiality issue.”

The information gathered from the visits is compiled and analyzed at the (name of research organization). The (coordinator) and the Task Force members review this analysis and then write recommendations for future economic development initiatives for (name of community or county). “One of the reasons for the popularity of the program is that it not only provides a long range plan for the community, but also yields some short range tangible results,” said (name of BR&E state sponsor).





## NEWS RELEASE: BEING ACCEPTED INTO THE PROGRAM

*Instructions: Simply fill in names of local leaders, cities, etc. Revise as necessary.*

(name of community or county) will be implementing a local economic development program early next year, according to (name), the program's local coordinator.

The county's application for the Business Retention and Expansion Visitation Program was accepted by the (name of organization sponsoring BR&E technical assistance), which sponsors this economic development program.

("Insert a quote from the sponsoring agency about its enthusiasm for the program or the potential benefits, such as creating jobs, keeping industry, and improving the business climate)." said (name and title of local leader). The program fee is \$ and is being paid by (name of local sponsor).

The main objective of the BR&E program is to assist existing businesses within the county to become more competitive, according to (name of BR&E state sponsor), providing guidance to the local program. According to (last name state sponsor), helping firms become more competitive increases the chances of those firms staying and expanding in the community; hence, the name of the program.

(name of consultant) said that the focus of the program is on assisting existing businesses rather than attracting new ones because existing businesses account for about 70 percent of all new jobs.

To assist existing businesses, (number) volunteers, who will be selectively recruited and briefed about the program during the next several months, will visit about (number) local manufacturers and service businesses in (months) to gather information. The volunteers will use a ten-page questionnaire prepared to identify, among other items, the businesses' needs, criticisms, and concerns about the county. This information is reviewed by a local task force of community leaders who will try to solve these problems.

Other local leaders serving on the Leadership Team are: (names and titles of local leaders). The Task Force includes the following community leaders: (names and titles of community leaders).



## NEWS RELEASE: TRAINING VOLUNTEERS

(number of participants) community leaders met at the (name of meeting site) on (day of week or date) to prepare for the community's economic future. The two-hour meeting was the formal kick-off of a local Business Retention and Expansion Visitation Program sponsored by (name of the sponsor(s)).

This program is receiving technical and research support from the (name of organization). The (day of week) night's orientation program was lead by (name of consultant), a Certified BR&E Master Consultant, certified by Business Retention and Expansion International.

"Existing firms are the best sources of growth. We want to find out how we can help them to grow in our community. We have an excellent team in place to work on this and expect excellent results", said (coordinator), coordinator of the local program.

The program is designed to stimulate economic development by assisting existing industry, according to (name and title). (same name) pointed out that to assist industry, a community must first identify industries' needs and problems and then address those concerns to improve the local business climate.

The volunteer visitors will be visiting (number) local manufacturers between now and (final target date). During each visit, each team of two volunteers will use a ten-page questionnaire to gather information about each business. The two training sessions last night were held to help prepare the volunteer visitors for their interviews.

("Quote from a volunteer about what he/she learned from the training sessions or his/her opinion of the program after the training or about his/her participation in the project.") said (name), one of the volunteer visitors.

During the training, volunteers viewed a videotape documentary about one of the first counties to complete the BR&E Visitation Program. They also asked questions of (name), coordinator of (county) County's BR&E program via teleconference. They also reviewed the questionnaire in detail.

(coordinator) emphasized that the information gathered through the surveys will be strictly confidential.

("Quote from coordinator about the his/her expectations of the program or the results and recommendations at the end.") (name) said.



## NEWS RELEASE: VISITING LOCAL BUSINESSES

Beginning this week, (number) county industries will be given the opportunity to voice their opinions about the local economy and local state government as (sponsor) starts an economic development program.

The (name of area) Business Retention and Expansion Program officially begins this week as trained volunteers meet with local industries to identify their needs and concerns, ask their opinions about local and state government, and determine in what ways the local business climate can be improved.

“The visits we are doing with local firms have four purposes” said (name of local leader). “First we want to show our local businesses that we really appreciate the contributions they are making to our local community. Second, we want to see if they have any local concerns, and, if so, if there are any ways we can help. Third, we will be offering to help our local firms take better advantage of state and federal business programs. Finally, we want the businesses to help us set priorities on future directions of local economic development efforts.”

The (local sponsor) is the local sponsor, while the (name of organization) is the state sponsor.

(“Quote from the coordinator about the purpose of the interviews, or the importance of industries cooperating to make the program successful.”) (name) said.

Since 1986, at least fifteen states have developed programs similar to this one. Business Retention and Expansion International, an association for the advancement of business retention and expansion, was established in 1994 to encourage communities to work with their existing businesses. The (name of state organization providing technical assistance/research support to BR&E) has helped (number) of communities develop programs in (name of your state).



## NEWS RELEASE: FOLLOW UP

*Instructions: This news release is not fully developed because follow-up work or success stories can follow many different channels. A few leads are provided to give you ideas about an article.*

The president of (business) announced today that he will not relocate his plant to South Dakota, but will expand here, creating an estimated (number) jobs because of (cite reason).

The superintendent of the vocational school introduced at last night's \_\_\_\_\_ meeting a revised training curriculum to better meet the needs of local industry. (This might occur if businesses complain that they have difficulty employing adequately trained workers.)

A traffic light will be installed at the intersection of \_\_\_\_\_ and \_\_\_\_\_ as a result of a local development effort, according to (name). (This might occur if a business complains that the intersection is hazardous for its truckers, which increases its insurance premiums.)

A Department of Development official spoke about labor-management relations at a seminar series that began last night at (place). (This might occur if the task force, in response to a large number of firms wanting more information about labor-management relations or some other topic, forms a seminar series or breakfast forums featuring speakers from the state government, regional organizations, and the private sector.)

These business assistance programs stemmed from feedback received when (number) local firms were visited through the Business Retention and Expansion Visitation Program. The program was sponsored locally by (name of sponsor) and received technical and research assistance from the (name of state organization providing technical assistance/research support to BR&E).

## NEWS RELEASE: COMMUNITY COMMENCEMENT MEETING

*Instructions: This news release is not fully developed because the final meetings vary considerably in format and content. Two leads seem obvious: either start with the number of people attending or start with the most important or interesting finding or recommendation that is presented at the meeting (sample leads are provided). The remainder of the news release should describe the results and recommendations of the program and quotes from the principal leaders as to the success of the program. Some groups simply share their report with the media early with the understanding that no releases will occur until after the community meeting. Others have used press conferences just prior to the meeting.*

More than (number) people attended the (county) County business retention and expansion meeting last night at the (place), according to (coordinator), coordinator of the BR&E program and organizer of the event.

More than 80 percent of the local industries consider (county) County to be an excellent or good place to do business, according to the results of a recent survey.

Four out of every five industries in (county) County want (list most important finding, why it is important, and what the task force recommends).



## APPENDIX E: REPORT ON PRACTICE VISITS

(1) What firms did you visit in your practice visit?

1) Firm Name \_\_\_\_\_ City \_\_\_\_\_ Date \_\_\_\_\_

2) Firm Name \_\_\_\_\_ City \_\_\_\_\_ Date \_\_\_\_\_

(2) How long did the visit take?

Firm #1: \_\_\_\_\_ Minutes      Firm #2: \_\_\_\_\_ Minutes

(3) How were you welcomed by the firm? (circle)

	very cool reception		skeptical		very warm reception
Firm #1:	1	2	3	4	5
Firm #2:	1	2	3	4	5

(4) What do you see as the benefits of collecting the data through personal visits?

(5) Which three of the "Guidelines for Volunteer Visitors" do you feel should be stressed the most in the Volunteer Visitor training? Why?

(6) Attach copy of surveys completed.



## RESEARCH CITED AND END NOTES

<sup>1</sup>BR&E Consultants will find related materials in Chapters 6,7,8,9 and 10 in Morse, George W., *BREI Consultant's Guidebook: Course for the Certification of BR&E Master Consultants*. Department of Applied Economics, University of Minnesota, 1996.

<sup>2</sup> Smith, Thomas R., George W. Morse and Linda M. Lobao, 1992, "Measuring Impacts of Business Retention and Expansion Visitation Programs," *Journal of the Community Development Society*, Vol.23. No. 1, pp. 135-139.

<sup>3</sup> Smith, Morse, and Lobao, *op. cit.*, pp. 127-128.

<sup>4</sup> This "red flag" review process is sometimes called the "Dete/Hileman Red Flag Review Process" after John Dete and Dale Hileman, who developed this approach into a useful tool. If you want more information on the approach, read Chapter 11 in *The Retention and Expansion of Existing Business*, (G, Morse Ed.), Iowa State University Press, 1990.

<sup>5</sup>The process described here follows general principles set forth in Bryson, John M., 1988, *Strategic Planning for Public and Nonpublic Organization*. Jossey-Bass Publishers, San Francisco.

<sup>6</sup>This form is an adaption of the Ohio State University form. See Black, Kathleen, David Patton, and Jerold Thomas, 1987, "Action Planning." The Ohio State University Extension Retention and Expansion Program, Columbus, Ohio, OSU Extension Publication 007.

<sup>7</sup> While this example runs from 9:30 am to 3:00 pm, these retreats have been run at all times of day. The Leadership Team decides on the best time.

<sup>8</sup>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.

<sup>9</sup>Elizabeth Templin, Minnesota Extension Service of BRE, Certified Consultant and Irene Rodriguez, Coordinator of the St. Paul University Ave. BR&E Project developed this approach.

<sup>10</sup> Eric Norland, Ohio Corporate Extension Service Education, developed this approach.

<sup>11</sup> 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.

<sup>12</sup>Adapted from Morse and Ha, *op. cit.*

<sup>13</sup> Sue Engelmann, Minnesota Extension Service Educator, developed this idea and used it very effectively in her program.

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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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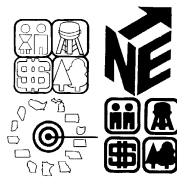
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