IMPLEMENTING

LOCAL

BUSINESS

RETENTION

AND

EXPANSION

VISITATION

PROGRAMS



Business Retention & Expansion Visitation Program

Using the Video to Introduce the Program and Train Volunteers

Scott Loveridge and George Morse

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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CONTENTS

Introduction	4
Overview of Three Video Segments	4
When to Use Each Segment	4
Tips for Using Segment 1: Sibley County Example. Why Show the Sibley County Video? Introducing the Sibley Video	
Show Segment 2	7
Appendix A: Self-Assessment Guide	8
Appendix B: Guidelines for Volunteer Visitors	9
Appendix C: Notes to Accompany Volunteer Visitor Role Play	1
Research Cited and End Notes	4



INTRODUCTION

Use this booklet if you are introducing the Business Retention and Expansion Visitation (BR&E Visitation) program to the local community. The material covered in this booklet provides pointers for effective use of the video that accompanies the *Implementing Local Business Retention and Expansion Visitation Programs* notebook. The video includes three segments. After an overview of each of these, this booklet suggests when to use each segment. Then there are tips on how to use each segment most effectively, and supplemental materials to use with small groups watching the videos.

OVERVIEW OF THREE VIDEO SEGMENTS

Segment 1: Sibley County Example

This fifteen-minute segment is a documentary of the BR&E Visitation program in Sibley County, Minnesota. In 1991, seventy-four local leaders in Sibley County visited eighty local firms and then developed a strategic action plan for responding to their concerns. While Sibley County is a small rural county, the same approach has been used in large metropolitan areas with only minor modifications. This segment of the video outlines the major steps in the BR&E Visitation process, the role of local leaders, the importance of the research component, and the outcomes of their strategic action planning efforts. Local leaders from Sibley County tell the story of how their program developed.¹

Segment 2: Tips for Successful BR&E Firm Visits

This twenty-minute segment outlines tips for doing the firm visits. A good BR&E Visitation action plan requires both high participation rates and high quality data from each of the firms visited. When the Volunteer Visitors are comfortable with their roles and have fun on the visits, the participation rates are high. In BR&E programs using this approach, the average completion rate is over 85% (compared to less than 30% in many survey efforts). Volunteer Visitors must follow guidelines to ensure consistency over all the firms and to ensure that the data reflect the opinions of the firms visited and not those of the visitors.

This segment shows Volunteer Visitors how to have fun on the firm visits and how to get high quality data. After an initial review of guidelines, three individuals role play a typical visit (two role-play Volunteer Visitors and one role-plays a firm owner). The role play differs from a typical visit in two ways. First, the role playing segment runs only ten minutes while a typical visit is usually about an hour. Second, the tape focuses on points where Volunteer Visitors might make mistakes—in fact, a few mistakes are made intentionally to aid discussion and learning. As you watch the tape, look for these mistakes and discuss them after the video. Hand out pages 11-12 of Appendix C to allow viewers to take notes on the role playing.

Segment 3: Addressing Immediate "Red Flag" Business Concerns

This six-minute segment outlines tips for dealing with the immediate concerns of businesses. It is an interview with Dale Hileman, former Eastern District Economic Development Manager of Columbia Gas of Ohio and an Ohio BR&E Consultant. Dale helped twelve counties implement local BR&E programs.

WHEN TO USE EACH SEGMENT

There are a number of points when you can use these segments. Here are some suggested times:

- General Awareness of Program
 Segment 1 (Sibley County Example)
- Orientation of Leadership Team
 Segment 1 (Sibley County Example)
 Segment 2 (Tips for Successful Firm Visits)
- First Task Force Meeting
 Segment 1 (Sibley County Example)
- Training Volunteers
 Segment 1 (Sibley County Example)
 Segment 2 (Tips for Successful Firm Visits)
- Task Force "Red Flag" Meeting Segment 3 (Addressing Immediate Business Concerns)



TIPS FOR USING SEGMENT 1: SIBLEY COUNTY EXAMPLE

Video tapes are similar to books, fact sheets, slide sets, or other teaching aids. They can help a group understand the program, but they seldom can do the job all by themselves. After all, every group has unique concerns and questions that need to be addressed. Here are a few tips on using the first video more effectively.

Why Show the Sibley County Video?

There are four reasons for showing segment 1 on Sibley County. If you use this video (or one from your state with similar features), the video will:

- 1. Demonstrate that the program has been done by people just like the viewers.
- Show the importance of involving people from a wide variety of organizations (private businesses, city government, county government, regional development commissions, economic development professionals, extension educators, and individual citizens).
- **3.** Give a picture of both the organization and goals of the program.
- **4.** Provide testimonials as to the program's effectiveness. The Leadership Team can say these things, but the message is much more effective if given by third parties in the video.

Introducing the Sibley Video

Three points must be covered to introduce the Sibley County video effectively:

- 1. Has your community done the BR&E Visitation Program before? If so, when and how?
- **2.** Is your community similar or dissimilar to Sibley County?
- **3.** Identify the key points the group should look for in the video.

Communities with Prior BR&E Programs

If your community completed a BR&E Visitation program, some local leaders might be skeptical of re-doing this program. If the earlier program was identical to this one and done recently, they would be right! But was it the same?

The "Self-Assessment Guide" found in Appendix A of this booklet can help your local group decide whether or not prior BR&E Visitation programs were the same as this one. In most cases, earlier programs were probably much different than this one. After this ten-minute exercise, your local leaders will realize the differences and be more likely to watch the video carefully.

Areas Dissimilar to Sibley County

If your area seems different than the Sibley area or than Minnesota, there are two options:

First, see if your state or a neighboring state has a documentary that covers the basic structure of a BR&E Visitation program. For example, Ohio and Indiana have almost identical videos even though their local economies are different from Minnesota's economy.

Second, consider doing what North Dakota did when they first started their program. They used Ohio's video. When they introduced it, they would say: "This video is for Ohio which of course is much different than North Dakota. Much of this tape probably fits our situation, while some of it probably doesn't. Rather than spending \$20,000 to develop our own video we decided to use this and, then after we watch it, we can talk about what parts fit and what parts don't."

Suggest Key Issues in Video

The old adage: "Tell them what you are going to tell them, tell them, and then tell them what you told them," fits here. Ask the viewers to look for the answers to the following questions as they watch the video:

- Does the program focus on concerns of the area's existing businesses?
- Is the program action-oriented?
- Are local leaders from business, education, local government, and professional development agencies actively involved as Task Force Members and Visitation Volunteers?
- Are survey results analyzed by an independent outside researcher?
- Do local leaders make all of the decisions on priority projects after the survey and research is complete?
- Is a key part of the process an implementation program?



Does Your Equipment Work?

Test your equipment before the meeting!! Testing the equipment will help you identify any bugs, make sure the video is properly cued to the right segment, and avoid potential embarrassment if you aren't familiar with the equipment.

Use Small Groups to Generate Questions

After showing the video, break into small groups of three people. Ask each group to take time to prepare three or four questions on the BR&E Visitation program. Point out that *any question* on the BR&E Visitation Program is okay.

If you skip this small group discussion step, your group's questions will not be as penetrating, tough, or as beneficial to the Task Force. Consequently, your group won't learn as much about the program and whether or not it fits your community. This means you are less likely to successfully sell the program. And if the group's questions result in them deciding the program doesn't fit, it's better for everyone to decide this now, rather than after you have put more resources into the program.

Allow about five to eight minutes for small group discussion. It will go faster if you designate who is in each small group.

Question and Answer Session with Experienced Local Leader

For the question and answer session, have your group interview a local leader from a community that has already participated in a BR&E Visitation program. This will make the responses much more tangible than if you or a program sponsor answers these. Encourage each group to ask questions. No questions related to the BR&E Visitation program should be out of bounds. To give every group a chance to participate, the moderator should solicit one question per group until all groups have been able to ask a question. Repeat this procedure as long as time permits.

If this program is new in your state or region, you might wonder how to find an experienced leader. To find the closest contact, connect with the Business Retention and Expansion International web site at: (http://www.brei.org).

Tips for Finding an Experienced BR&E Visitation Leader

What follows are some answers to commonly asked questions about finding a resource person to help you introduce the program to your community.

Question: If we have a program nearby, what type of person should we select to speak?

Answer: If your group is primarily business people, select a business person. If they are farmers, select a farmer. Groups like to talk directly to their peers. Avoid extension educators or state agency personnel that work directly with the BR&E program. They are expected to be enthusiastic about the program and thus are not as credible as someone who is a peer of the audience.

Question: If the resource person has to travel a long way, and we can't afford to cover his/her travel, is there another option?

Answer: You bet!!! In many states groups have used a speakerphone successfully for the question and answer session. With a speakerphone, the experienced BR&E Visitation leader can be heard by the entire group. Initially, many groups are afraid to use this method. However, we have used this often, and it is well accepted once groups try it. It won't work, however, if you don't have small groups generate questions. If you really want to enhance the speakerphone, get a few slides of the person before the meeting so people can see his/her picture. But 99% of the time, we just use the speakerphone.³

Question: How will you know if the outside speaker will do a good job?

Answer: Only by calling the person in advance and asking lots of questions yourself. If the person does a good job, then invite that person to be interviewed by your group.

Question: Would you use the above approach (introduction, show video, small groups, and telephone question and answer) all four times when video Segment 1 is used?

Answer: You bet!!! We have used it in all four cases (general awareness, Leadership Team orientation, first Task Force meeting, and training Volunteer Visitors). People have questions in all of these situations. If you don't let them ask their questions in the meeting, they will ask them later, when no one with direct experience is available to answer them.



TIPS FOR USING SEGMENT 2: SUCCESSFUL BR&E FIRM VISITS⁴

This segment of the video is used only for training the Leadership Team for its practice visits, and during Volunteer Visitor training. This tape has a more specific job, so it doesn't require as much introduction as segment 1. Consequently, we suggest the following:

Introduce the Video

Introduce video segment 2, and emphasize the following:

- The reason for visiting firms is to obtain their opinions.
- Obtaining high quality information is critical for helping firms.
- Visiting firms is fun.

Obtain Firm Opinions

The reason for doing a BR&E Visitation program is to build an awareness of local business problems in order to help firms address problems and help communities retain and expand their existing firms. Consequently, it's important to obtain managers and owners' opinions on the local business climate. Volunteer Visitors must not influence those opinions while gathering data during the firm visits.

High Quality Data

Stress the importance of obtaining high quality data for the development of a good action plan. If there are a lot of missing items, or if the note taker writes sloppily or doesn't provide a clear description of the problems, your local Task Force won't be able to respond as well to the needs of the firms visited.

Visits are Fun

Also point out how much fun it is to visit firms. Emphasize that the video will prepare volunteers so that they will have fun while visiting the firms.

Give Volunteers a Copy of "Guidelines for Volunteer Visitors"

The guidelines are in Appendix B. A copy of the survey used in the video is provided in Appendix C. You may wish to distribute this so people can follow the dialogue more easily—make sure people realize that this survey was **shortened** for the video illustration.

Show Segment 2

Don't forget to check your video equipment before the meeting starts!

Group Discussion of Role Playing

- Ask the group to point out what the person ASKING THE QUESTIONS did correctly and incorrectly. (Answers are in Appendix C)
- Ask the group to point out what the person TAKING THE NOTES did correctly and incorrectly. (Answers are in Appendix C)

TIPS FOR USING SEGMENT 3: HANDLING IMMEDIATE FOLLOW-UP ISSUES DURING THE BR&E VISITATION PROGRAM

This segment is used only at the beginning of the first meeting on "red flag" issues. (See the booklet entitled: *Local Leadership Team Manual* for details on this meeting).

Introduce this video segment.

Show video segment 3.

Ask the group to discuss the importance of this stage of the program.

Outline the process for reviewing immediate business concerns. (See booklet entitled: *Local Leadership Team Manual* for details on this.)



APPENDIX A: SELF ASSESSMENT GUIDE FOR COMMUNITIES WITH PRIOR BUSINESS RETENTION AND EXPANSION VISITATION PROGRAMS

Many communities have done BR&E Visitation programs. Some communities have had more success with their BR&E Visitation Programs than have others. This self-assessment guide will help you decide whether your community has already participated in a BR&E Visitation program that is identical or similar to the program outlined in these booklets, and it will help you decide whether you should revitalize your BR&E efforts.

If this guide is used at a local meeting, give each person a copy of this page and ask the attendees to independently circle answers to the questions. Then ask the group members to compare answers, discuss whether or not the community needs to revitalize its BR&E efforts, and whether or not it should participate in the BR&E Visitation program. Answer the following questions for the most recent BR&E Visitation program completed in your community.

In our earlier BR&E Visitation program, we: (circle one per line)

		Agree	Disagree	Not Sure
1.	Visited at least 30 firms.	A	D	N
2.	Organized a local Task Force of at least 20 leaders from government, education, business, and professional developers.	A	D	N
3.	Had survey results analyzed by an independent outside analyst.	A	D	N
4.	Had a research report with action plans for programs to help existing firms.	A	D	N
5.	Relied on the local Task Force to decide on the projects in the report.	A	D	N
6.	Established an effective procedure for handling immediate business concerns.	A	D	N
7.	Had a written report that listed the names of at least 2-3 local leaders responsible for leading implementation of each strategy.	A	D	N
8.	The local Task Force met at least quarterly for a year after the community meeting as part of the implementation effort.	A	D	N

If your community does not answer "A" to each of the above questions, then the program in this notebook is different than your earlier program.



APPENDIX B: GUIDELINES FOR VOLUNTEER VISITORS

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collected, leading to the retention and expansion of local firms and jobs.
1. Tips on Scheduling the Firm Visits
Who schedules the visits? You or your partner.
Suggested conversation when you telephone the firms assigned to you:
"Good morning, my name is
Recently you received a letter about a Business Retention and Expansion program from This is an effort to see what can be done to improve the business climate for our local businesses and to help them improve their profitability.
Part of the program involves volunteers like myself visiting with business owners or managers to get their opinions on these questions and to review the survey in that letter.
My partner,, and I would like to schedule a visit with you next week. What would be a convenient time for you?"
When? Call within a week. Visit within 2 weeks.
Who should be visited? Owner or operator of the business.
Where? At the firm's office or home of the person you are interviewing.
How long does it take? 45 to 60 minutes.
2. Tips on Introducing Yourself During the Firm Visit
Break the ice and express thanks for the firm's economic contributions to the community.
Give firm owner an extra copy of the survey, if the person doesn't have one.
Cover the two important survey ground rules (confidentiality of results and the skip-it rule—if they don't want to answer a particular question, they can just say "I'd like to skip that one.")



3. Tips for Person Asking Questions

Ask every question.

Ask the question exactly as worded. No matter how bad the question seems, don't change it. However, if you want to ask another question in addition to the one on the survey, one with slightly different wording, that is okay. If you ask this new one, write down both the new question and the answer.

Listen carefully (count silently to ten). As a visitor, your job is to listen to the opinions of the firms. They really like that. If necessary count silently to ten as a means of staying quiet.

Repeat the question if necessary.

Never suggest answers, even if you are positive you know the correct one.

Probe answers. This is okay. Something like: "Could you tell us a little more about that?"

Do not take offense to opinions. If you start debating their points, some owners will stop sharing them with you.

Do not promise any solutions. The BR&E Task Force has no formal authority and budget with which to solve problems. They often can help firms look into these problems.

4. Tips for Person Taking the Notes

Always circle (never check) responses.

Notes must tell full story. The local Task Force and coordinators can't read your minds. If the notes are incomplete, the firms might not be helped.

List visitors' names on the cover. If there are questions about your visit, you can be contacted.

Write clearly.

5. Tips for After the Visit

With your partner, discuss if there are urgent "red flag" issues (e.g. firms considering moving, closing, or expanding, etc.).

Note urgent concerns or "red flags" on the back cover.

Return the surveys as soon as possible.

6. Name of Person to	Call if you Have Proble	ms (typically the V	isitation Coordinator)
Phone number:_			



APPENDIX C: NOTES TO ACCOMPANY VOLUNTEER VISITOR ROLE PLAY

Survey Used in Video -- Role Playing for Volunteer Visitors

(Note: This survey was shortened for purposes of the video. Most programs use surveys that last about an hour.)

(1vote. This survey was shortened for purposes of the video. Wost programs use surveys that last about an hour.)
Cover sheet:
Name of firm being visited:
Address of firm:
City: State: Zip:
Name of person being interviewed:
Date of interview:
Persons doing visit:
1. The program is sponsored locally by the Fergus Falls Chamber of Commerce, the City of Fergus Falls, the Fergus Falls Community College, and the Otter Tail County Extension Office. We are getting technical assistance from the University of Minnesota and the Minnesota Extension Service.
2. Our project has three major objectives:
a. To demonstrate the community's willingness to help our existing businesses.
b. To identify needs and concerns of our existing businesses so we can help them retain and even expand their employment.
c. To develop long range economic development plans for helping existing business.
The confidentiality rule . Your individual answers to this survey are confidential. Your response will be summarized with those of other firms and reported as percentages or averages.
The skip-it rule . If there are questions you want to skip, we will do that. Just let us know. There is no need to explain your reasons for skipping a question.



Yes No (if not, correct it.)			
2. When did your firm begin its operation here?(year)			
3. What are your firm's major products?			
4. Do you expect the demand for your products to increase, stay the same, or decrease over the next three years?			
A. Increase B. Stay the same			
C. Decrease			
5. Could you explain your answer to number 4?			
6. We want to encourage other firms to use development programs that are useful. For those programs that you have used, could you tell us which ones you would recommend to other firms? (Circle one response per program.)			
Would Recommend?			
Minnesota Extension Service Yes Maybe No			
Minnesota Technology Program Yes Maybe No			
Department of Development Yes Maybe No			
Economic Security Department Yes Maybe No			
Environmental Protection Agency Yes Maybe No			
(other?) Yes Maybe No			
7. How would you rate the quality of the following public services? Please rate each one as excellent, good, fair, poor, or very poor. (Circle one on each line.)			
Excellent Good Fair Poor Very Poor			
Water system 1 2 3 4 5			
Elementary/secondary Schools 1 2 3 4 5			
Fire Protection 1 2 3 4 5			
Emergency Medical Service 1 2 3 4 5			
Police Protection 1 2 3 4 5			
8. Considering everything, how would you rate this community as a place to do business—excellent, good, fair, poor, or ver poor? (circle one)			
Excellent Good Fair Poor Very Poor			



Evaluation of the Volunteer Visitors in the Role Playing Video Segment

If you are in charge of training the volunteers, show them the video entitled: **Tips for Successful BR&E Firm Visits** and then give the following introduction and ask them these questions.

<u>Introduction:</u> Liz Templin (the person asking the questions) and Kent Gustafson (the person taking the notes) intentionally did some things correctly and incorrectly while role playing. Now we want you to discuss them. Get into small groups and discuss the following two questions. When you are finished, we'll talk about these as a group.

A. What did Liz Templin, the person asking the questions, do correctly and what did she do incorrectly during the role play?

Points done correctly.

- 1. Liz reviewed background, objectives, sponsorship and ground rules for the survey. (Note that this only took one minute and avoids many problems).
- 2. Liz covered all of the questions on the survey. (If some people skip questions, the quality of the survey data is diminished greatly, and you will not be able to help your firms as well.)

Points done incorrectly.

1. On question six, she didn't read the question exactly as written. (If each visitor asks questions in a different way, the survey results will be impossible to understand. The results will be apples and oranges!)

B. What did Kent Gustafson, the person taking the notes, do correctly and what did he do incorrectly?

Points done correctly.

- 1. Kent asked if the business owner received a copy of the survey. (All of the firms should have received a survey in the mail. But some firm owners misplace them.)
- 2. Kent asked the business owner to repeat the name when he didn't get it. (This happens fairly often. Don't be afaird to ask for time to complete notes.)
- 3. Kent wrote notes clearly. (Have mercy on those that have to read your notes later. They can't help the firm if they can't read your notes.)

Points done incorrectly.

- 1. Kent didn't wait for an answer on question five on why the business owner expected sales to increase but jumped in and offered his own answer. (Remember, this defeats the purpose of going on the visits. You want the firm's opinions not that of the volunteer visitors.)
- 2. When the business owner rates the quality of fire protection poorly, Kent promises to get this corrected. (He doesn't have the authority to do this. He could promise to bring it to the attention of the city but not to get it corrected.)
- 3. Kent objected to Ms. Yoho's opinion that the EMS service was very slow and became argumentative. (This could cause the firm owner to stop offering opinions. If the owner stops, this reduces the quality of the data and makes it harder to help the firm.)
- 4. Kent checked some of the questions rather than circling them. (Sometimes checking answers makes it very hard for the computer coder to undertand the response, leading to errors in the results.)



RESEARCH CITED AND END NOTES

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² While the Dillman Total Design Method often have higher rates than 30%, few local economic development groups use the full Dillman approach in doing local surveys. For a full exposition of the Dillman approach, see Dillman, Don A., 1978, *Mail and Telephone Surveys: The Total Design Method*. Wiley-Interscience Publications, New York.

³For a picture of the cost savings potential of this approach see: Rohrer, John D. and George W. Morse, 1990, *in* George W. Morse, (ed.) *The Retention and Expansion of Existing Businesses*. Iowa State University Press, Ames, pp. 79-92.

⁴Kent Gustafson, Elizabeth Templin, and Carole Yoho, Minnesota Extension Service faculty do the role playing on the video. The concept for this role play was developed by Nancy Lenhart, Minnesota Extension Service Educator, Mr. Clinton Kurtz, President of Citizens State Bank of Norwood, Scott Loveridge and George Morse.

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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.

BUSINESS RETENTION AND EXPANSION VISITATION PROGRAM

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