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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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**IS IT FOR  
OUR COMMUNITY?**

George Morse and Scott Loveridge

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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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**Listen to what local leaders have said about their Business Retention and Expansion Visitation Programs:**

*“It gave us an opportunity and, more importantly, gave us a reason to work together in Filmore County.”*

— Gary Peterson, Filmore County Commissioner

*“People were aware that we knew that they were there, that they knew that we cared.”*

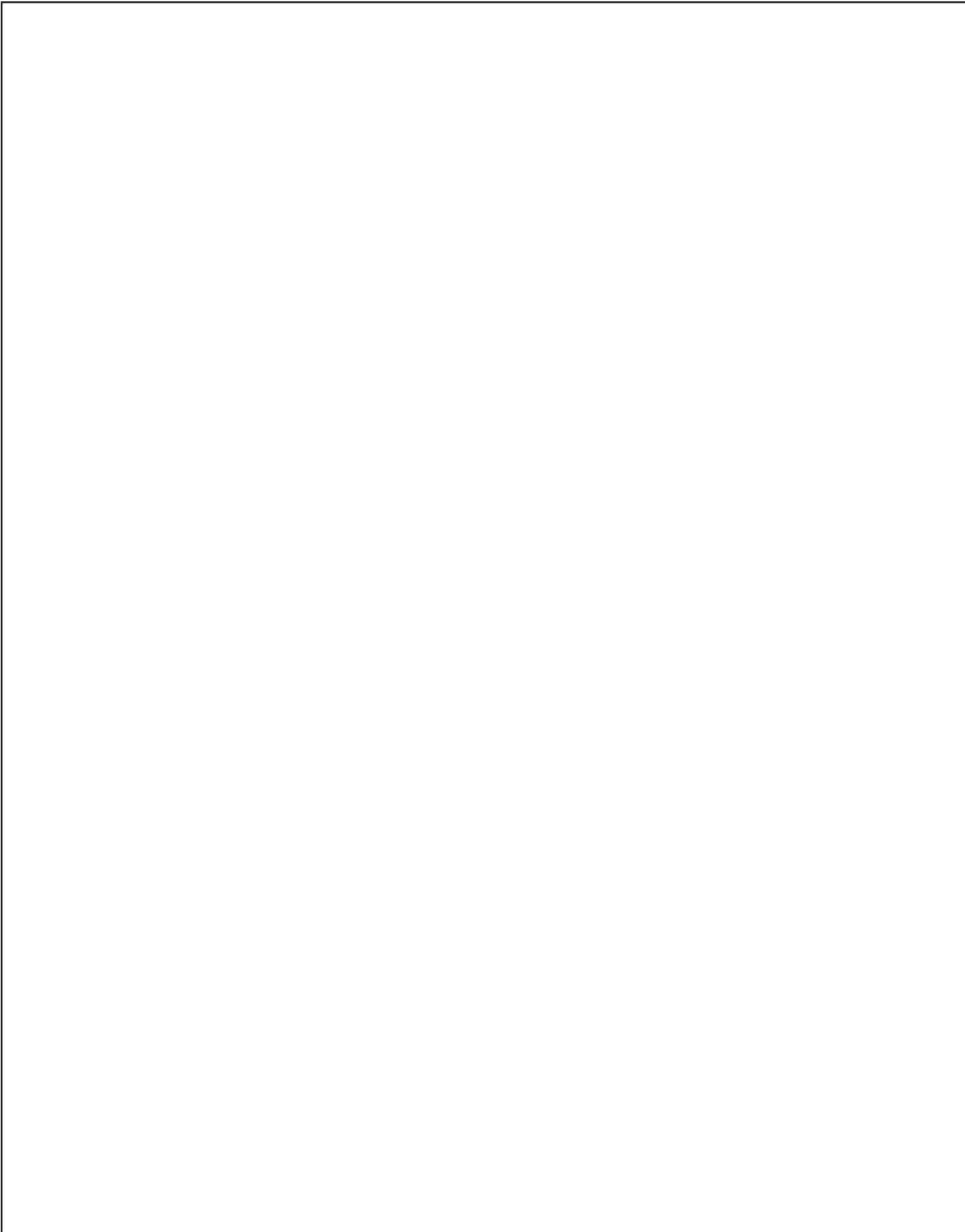
— John Caskey, Glenwood Economic Development Director

*“It is a vehicle that people can get on to establish rapport with their businesses.”*

— John Morris, Minnesota Extension Service:

*“It created an awareness for business people in Pope County that was simply unknown before this was attempted.”*

— Jim Johnson, Starbuck Chamber of Commerce





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## IS A BR&E VISITATION PROGRAM FOR YOU AND YOUR COMMUNITY?<sup>1</sup>

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If you are interested in encouraging economic development in your community, this booklet is for you. Whether you are a professional economic developer, a chamber of commerce official or member, a local government official, an education official, or an interested citizen who wants to see your area become more economically resilient, you will be interested in this approach to economic development. It's called the Business Retention and Expansion Visitation (BR&E Visitation) program.

This booklet will help you understand this local development strategy, its benefits and costs, and what you and others need to do to have a successful local program. This booklet will help you decide whether or not to adopt this strategy, and, if you do, how to do it. This booklet and the accompanying video can help you see the possibilities for your own community. The final results depend upon **you and your community**.

To help you decide if this approach fits your community, we cover the following questions:

- Why are existing businesses important in local economic development?
- What is the BR&E Visitation program?
- What are the BR&E Visitation objectives and process?
- What roles do local citizens and leaders play in the program?
- What are the benefits to a community and to the volunteers in program?
- What are the costs of the program?
- What assistance is provided by universities, state agencies, and others?
- How can you learn more about this program?

## WHY ARE EXISTING BUSINESSES IMPORTANT TO DEVELOPMENT?

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Existing firms are an engine of economic growth. Some studies estimate the percentage of new jobs created by existing firms as high as 80%, while the most conservative estimates say 40%.<sup>2</sup> When a community commits to working with its existing firms, it commits to working with a group of firms that are important to the future of the local economy, and to those who have already invested in the community.

Many communities have pursued policies designed to attract outside firms to move into the area. However, such a strategy is not likely to be effective if existing businesses are not happy with the local business climate. Sometimes communities that are successful at attracting new firms do not see much growth. While new firms come in the front door, their existing firms downsize or exit through the back door. Increasingly, communities are recognizing that it makes sense to pay attention to the survival and growth of their existing firms.



## WHAT IS THE BR&E VISITATION PROGRAM?

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Business Retention and Expansion (often simply called BR&E) includes all efforts to encourage the survival and growth of a community's existing businesses.

Examples of the hundreds of possibilities include:

- Providing technical training for new employees.
- Providing management seminars for employers.
- Helping firms identify local sources of input supplies and materials.
- Encouraging better labor/management relations.
- Reducing the cost and upgrading the quality of local government services.
- Establishing better school-workplace relations and fit.
- Retaining youth in the community.

All of these examples help firms to become more productive and thus more competitive. These ideas don't try to hold the clock in place or to roll it back. Instead they help your local firms stay ahead of their competitors in other communities.

A BR&E Visitation program is a planning process for setting priorities for community sponsored Business Retention and Expansion programs that best fit the needs of local firms. A BR&E Visitation program recognizes that few communities can do everything that they would like to do to help their existing firms. Your community probably does not have the funds nor the leadership time to do it all. So—you have to decide what types of projects could do the most for your local firms. Your priority projects depend on the types of firms in your community, the competitive pressures they are facing, the nature of your local public services, the qualities of your labor force, and many other factors.

## WHAT ARE THE BR&E VISITATION PROGRAM OBJECTIVES AND PROCESS?

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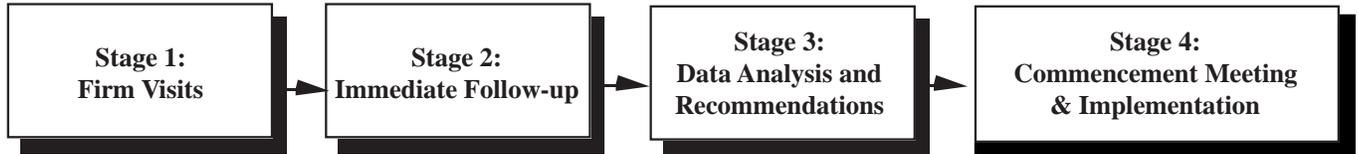
Most local BR&E Visitation programs have the following objectives and visitation process:

### Objectives

- Demonstrate to local businesses that the community appreciates their contribution to the local economy.
- Help existing businesses solve problems.
- Assist businesses in using programs aimed at helping them become more competitive.
- Develop strategic plans for long-range business retention and expansion activities.
- Build community capacity to sustain growth and development.

## BR&E Visitation Process

Typically, there are four stages to the BR&E Visitation *Process*:



**Figure 1: Flow diagram of the four typical stages in the BR&E Visitation Process.**

<b>Stage 1: Firm Visits</b>	
<b>Activity</b>	<b>Who Does It</b>
Organize Local Task Force	Leadership Team/Consultant
Recruit Firm Visitors	Task Force
Train Firm Visitors	Leadership Team/Consultant
Visit Firms	Volunteers and Task Force
<b>Stage 2: Immediate Follow-up</b>	
<b>Activity</b>	<b>Who Does It</b>
Review surveys	Task Force/Consultant
Assist Firms	Task Force and Others
<b>Stage 3: Data Analysis and Recommendations</b>	
<b>Activity</b>	<b>Who Does It</b>
Computerize Survey Results	University Faculty
Analyze Data	University Faculty
Suggest Projects	Development Experts and University Faculty
Review Suggested Projects	Task Force/Consultant
Adopt Projects to Implement	Task Force
Review Outside Sources of Assistance	Task Force and Outside Groups
<b>Stage 4: Commencement Meeting and Implementation</b>	
<b>Activity</b>	<b>Who Does It</b>
Share Results at Commencement Meeting	Task Force
Implement Projects	Task Force and Others



## VIDEO SEGMENT

If you would like a quick illustration of the steps in the BR&E Visitation process, view segment 1 of the video that accompanies this set of booklets. That segment follows Sibley County, Minnesota, through the steps listed above.

## LOCAL ROLES IN THE BR&E VISITATION PROGRAM

### Overall Coordinator's Role

As with any successful program, someone has to be the spark plug for it. The spark plug for the BR&E Visitation programs is the Overall Coordinator (or Chair of the Leadership Team). His/her formal duties include convening the Leadership Team and serving as meeting chair.

### Leadership Team's Role

Three or four other local citizens need to share the leadership role with the Overall Coordinator: Media Coordinator, Visitation Coordinator, Business Resources Coordinator, and Milestone Meeting Coordinator.

The Media Coordinator helps to coordinate media coverage.

The Visitation Coordinator helps organize the Task Force and Visitation Teams to prepare for the firm visits.

The Business Resources Coordinator helps organize the Team to respond to the firms' urgent and immediate concerns.<sup>3</sup>

The Milestone Meeting Coordinator helps organize the Task Force retreat, the business resources meeting, and the community commencement meeting.

All members of the Leadership Team participate in all stages, with *each* Coordinator serving as the quarterback at different stages of the program. The publication *Local Leadership Team Manual* gives more details on the roles and responsibilities of the Leadership Team and the Overall Coordinator.

## Task Force's Role

The BR&E Visitation Task Force's main responsibilities are to:

- Set the overall policies for the program (e.g., number of firms to visit, types of industries to include, number of visits/team, etc.).
- Recruit sufficient volunteers to conduct program (each Task Force member usually recruits one or two Volunteer Visitors).
- Assist in securing written endorsements from local organizations.
- Attend the firm visit orientation and visit at least two to four firms each.
- Participate in two meetings to handle the immediate concerns of local firms and to assist in the follow-up work.
- Review the research results and set priorities for long-term projects for BR&E (done in a four-hour mini-retreat).
- Assist in planning the community commencement meeting.
- Assist, as appropriate, in the implementation of the projects.
- Attend quarterly progress reporting sessions for a year after adopting the priority projects.

Each Task Force member will need to contribute about twenty hours prior to the community commencement meeting. This is spread over several months for less than one hour per week. Naturally, some Task Force members will spend more time because they become very involved in helping businesses with immediate concerns, but typically, this involvement is part of their "day-job" responsibilities. Each Task Force member's specific responsibilities for ongoing implementation are arranged after the projects are identified.

### Diversity of Task Force Membership

As illustrated, your BR&E Visitation Task Force should consist of five different groups of community leaders: (1) Business Leaders, (2) Development Professionals, (3) Local Government Officials, (4) Education Officials, and (5) other key Community Leaders. Your Task Force needs this diversity because each of these leader categories can contribute to the solution of local business development problems. For example, business owners can help the Task Force better understand the problems expressed in the surveys. School officials have been able to help start school/business partnerships and to reform educational



programs to address business needs. Local elected officials need to learn about concerns with public services. And professional developers often have information on state and federal programs that are needed by firms. A recent research project has shown that groups that have a broad-based Task Force are more likely to implement their priority projects than those that don't.<sup>4</sup>

If you live in a sparsely populated area, you may feel that you can't get everyone from all five groups. Experience has shown that almost every community can find someone in each of these roles. They may not live in your community, but their territory includes your community. Invite them!

### **Eligibility for Task Force**

What skills do you need to be an effective Task Force member? Task Force members need to be recognized community leaders because an influential group is needed at various times during the process:

- When you need to handle the immediate concerns of the firms.
- When projects are selected.
- When projects are presented to the public.

Beyond being a recognized community leader, Task Force members who possess a basic understanding of the local economy and work easily with others will be effective.

### **Whom Should We Invite to be on the Task Force?**

#### **Business Leaders:**

Chamber of Commerce Officers  
Bankers or other Financial Institution Members  
Local Utility Managers  
Other Business Owners or Managers  
Representatives from other Development Groups

#### **Development Professionals:**

Chamber of Commerce Staff  
Regional Utility Development Professionals  
Regional Development Commission Staff  
Staff from other Development Groups

#### **Local Government Officials:**

City Government Officials  
County Commissioners or Officials

#### **Education Officials:**

Superintendents of Elementary and Secondary Schools  
Vocational School Superintendent (one covering school district area)  
Community College Presidents  
Extension Service Agent

#### **Other Community Leaders:**

Religious Leaders  
Other Key Leaders

### **Volunteer Visitors' Role**

Volunteer Visitors must attend a two-hour orientation. During orientation, the Leadership Team will help the volunteers identify their Visitation Team member and learn how to interview firm managers or owners. They also will be assigned the (two to four) firms they will visit. This requires between six to eight hours of total time. These visits are usually done within a two- to four-week period.

In previous programs, Volunteer Visitors have represented a cross-section of professions and organizations. In addition to business persons and economic development professionals—ministers, plumbers, and school superintendents have been Volunteer Visitors. Despite this variety, all volunteers should be enthusiastic about the program, influential in the community, and must understand the confidentiality of the information they will be gathering.



Local influential leaders who are active in the community are usually the best volunteers because they recognize the importance of helping to improve the community's economy and well-being.

Volunteer Visitors should include people from both the public and private sectors. Volunteers such as chamber of commerce executives are important to the program because they have the resources, contacts, and leverage to address many of the concerns that industry reveals during the visits. And when your roster of volunteers also includes business owners and executives from the private sector, the program is more legitimate from industry's point of view. The program is perceived as more of a community effort rather than a "chamber," "council," or "city" effort; in some communities, these labels could damage the credibility of the program.

### Visited Firm Operator's Role

Typically between thirty and one hundred firms are visited. Generally, Volunteer Visitors are instructed to interview the firm owner or operator, but if this person will be unavailable for a long period of time, then volunteers are instructed to interview the highest management official possible.

## REASONS VOLUNTEERS PARTICIPATE

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Many volunteers participate because they care about the economic development of their community. Some volunteers (public officials, extension agents, development department representatives) participate because the program is essentially an extension of their current job. Some volunteers participate because they want to learn more about local industry, while others (new residents) participate because they want to learn more about their community in general. Still others (public officials, new residents, business owners and managers) participate because they want to meet new people and develop more personal and professional relationships, while others (retirees, housewives) participate because they want to become more active in their community. And still others participate because of peer pressure. These are just some of the reasons that volunteers have been motivated to participate in previous programs.

## HOW THE BR&E VISITATION PROGRAM BENEFITS VOLUNTEERS AND COMMUNITIES

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### Benefits to Volunteers

Citizens and local leaders who have worked with the BR&E Visitation program cite the following reasons why they have been active participants:<sup>5</sup>

- **BR&E Visits are *fun***

We guarantee you will have *fun!* Everybody says, "This is fun" after completing their first firm visit. You'll enjoy socializing with other key community leaders and participating in important community decisions.

- **BR&E Visitation Program *builds networks***

You can *build networks* with other local businesses and leaders, and with regional and state economic development professionals. These contacts can often help your business or future development efforts.

- **BR&E Visitation Program is a *learning experience***

You will *learn* about your local economy's strengths and weaknesses from the perspective of local businesses and gain insights on how your community is likely to develop in the future. You will *learn* about new options for working with existing firms and ways you can shape your community's destiny.

- **BR&E Visitation Program brings the community *together***

In many communities, citizens and local leaders are thinking about their future, but they're not working *together* to have an impact on the future. The BR&E Visitation program can bring your community *together*. Business persons, local government officials, education officials, professional developers and interested citizens all work *together* for the benefit of existing local businesses and their community.



- **BR&E Visitation Program is *do-able*, and it gets *results***

Citizens just like you and your neighbors have *done* this program in all sizes and types of communities. Excellent BR&E Visitation programs have been completed in rural, suburban, and urban areas and are getting *results*. Naturally, it's more rewarding to work on projects that are both feasible and achieve *results*.

- **BR&E Visitation Program demonstrates that “we care about business”**

Just visiting firms demonstrates that your community *cares* about its local businesses and appreciates their economic contributions to the area. It's surprising how many business leaders feel unappreciated and have not been personally told that the community values them.

- **BR&E Visitation Program is *low risk*, but only if done *correctly***

If you follow the guidelines in these manuals, the BR&E Visitation program is *safe*. As a local leader said, “How can you possibly lose?”<sup>6</sup>

## Benefits to Communities

- **Improved Public Relations with Existing Firms**

Most BR&E Visitation programs send two community leaders to visit each firm; this results in improved public relations with them. Research has shown that demonstrating a pro-business attitude was rated as one of the greatest benefits of the program.<sup>7</sup> Many firm owners have said: “This is the first time anyone has come to visit us and really listen to our opinion.”

- **Help Firms Solve Problems**

Often firms have concerns that require immediate attention. The BR&E Visitation approach outlined in these booklets is an effective means of quickly addressing many of these concerns. For example, the Portage County, Ohio, BR&E Visitation program provided business incentive information to twenty-two of the sixty-nine firms visited in 1994. Four of these firms are planning investments of over \$20 million and the addition of 117 jobs.

In St. Paul, Minnesota, a firm owner mentioned during

a BR&E visit that the firm might be forced to close due to a fire code problem. The BR&E Visitation program contacted the St. Paul Port Authority who worked with the firm and the fire department to develop a solution, saving 124 jobs. In reviewing the survey results, Task Force members in Harrisville, West Virginia, learned that local firms were losing business and missing shipments because the road into town was poorly marked. The Task Force worked with state government to correct the problem.

- **Help Firms Become More Competitive**

Profits are essential for the retention and expansion of firms. For a firm to survive, it must make a profit—at least over the long run. If your local firms can make more profit in your community than in others, you won't have any trouble retaining them. Since profits increase with higher prices per unit and lower costs per unit, other things being equal, BR&E programs that help firms reduce costs or increase values add to the firms' competitiveness. For example, when the Becker Otter Tail Dairy BR&E project in Minnesota found financing was a bottleneck for expansion of many local dairy farmers, the Task Force set up a dairy financing conference, which attracted ninety local bankers. Already, over \$3 million in new dairy facilities are in development. In Taylor County, West Virginia, the local BR&E Visitation Task Force found that workers lacked math skills, so they worked to establish a business and education partnership. This resulted in the development of a new program, which provides math training to workers. To give incentives to workers, a local greenhouse gave raises to workers who completed the math program. With their new math skills, workers make fewer mistakes when they mix chemicals, which saves the company money, and underscores concern for environmental issues.

- **Develop Action-Based Strategic Plans for BR&E Visitation**

Few communities can tackle all of the BR&E projects that could benefit local firms. The BR&E Visitation process outlined here helps the Task Force use the data to reach a consensus on high priority projects. A recent study found that one hundred percent of the most successful BR&E Visitation programs had written action-based strategic plans.<sup>8</sup> For example, the Anaconda, Montana, BR&E Visitation program developed an action-based strategic plan, which resulted in the following projects:

1. The development of a Jack Nicklaus golf course where an ugly hazardous waste site had been located at the entrance to the community.
2. The retention of a state hospital, saving five hundred jobs.
3. The development of business start-up educational programs that resulted in forming eleven new businesses and expanding seventeen home-based businesses.<sup>9</sup>

- **Build Community Capacity for BR&E**

The most important long-term benefit of this action-based approach to BR&E Visitation is that it builds the capacity of the community to do BR&E. Four important aspects of this improved capacity are:

1. Stronger collaboration between local development agencies, local governments, citizens, educators, and local businesses.
2. A better understanding by local leaders of the strengths and weaknesses of their community's local business climate.
3. Better communication among businesses and leaders.
4. Better linkages to state and federal development assistance.

A study of an Ohio BR&E Visitation program found stronger collaboration among a wide variety of local leaders—due largely to the process used by the Task Force to deal with immediate individual concerns<sup>10</sup> (for more information see *The Local Leadership Team Manual* p. 9). If you want to attract new firms, you must understand your community's strengths and weaknesses—from the perspective of the business world. No group is in a better position to tell you what these are than your existing firms. Prospective firms considering your area as a location will send a team to visit them.

You will have more success in attracting new firms if you talk with your local firms first and understand your community's strengths and weaknesses. For example, Fayette County, Ohio, had a long-standing reputation as having a poor labor climate as a result of strikes over twenty years earlier. However, the BR&E Visitation survey found that labor/management relations at the time of the survey were very good. The local Task Force used this information to successfully market their community to several new industrial prospects.<sup>11</sup> Although very few economic development programs

focusing on industrial attraction operate on a countywide basis, most BR&E Visitation programs do. This enables communities of varying sizes to pool their resources to help their existing firms compete.

## WHAT ARE THE COSTS OF A BR&E VISITATION PROGRAM?

So much for the *benefits*, what are the *costs* of doing a BR&E Visitation program? Let's take a look at these. Compared with many economic development programs, the BR&E Visitation Program is an extremely low-cost option.

### Volunteer Time: Cost or Value?

If you have a home flower garden and enjoy working in it yourself, how do you estimate the cost of your time? Do you simply take your average hourly wage times the hours you work? Or, since you are having fun, do you assume your time is either free or that you would need to charge yourself an entertainment fee? It's not clear cut, is it?

We run into the same problem when estimating the cost of volunteer time for the BR&E Visitation program. Because most people consider it fun to visit firms, it might be incorrect to estimate the value of their time as a cost. If you do count this time as a cost, citizens and local leaders collectively contribute about \$25,000 in time to an average BR&E Visitation program.

### How Long Does It Take?

A BR&E Visitation program takes two to three years to complete. Organizing the local Leadership Team usually takes one to two months. The firm visits and action-based strategic planning efforts take from four to nine months. The rest of the time is devoted to implementing the plans. Local economic development takes time and effort. It would be a mistake to recruit the Leadership Team and Task Force members on the promise that the program commitments would be completed in six months. That promise would forecast a program that develops a strategic plan that sits on the shelf and never gets implemented.



## How Many Hours Are Required Per Person?

Naturally, this varies considerably with the community, its problems, and the local leaders, but on average, the most time is spent by the Leadership Team, followed by the Task Force, and then the Volunteer Visitors. All three groups typically visit firms. In addition, the Task Force meets to set policy and to consider the survey results and future actions. Often, the Leadership Team convenes between Task Force meetings to set the stage for effective Task Force meetings.

**Table 1: \* Summary of Estimated Time Commitments of BR&E Visitation Participants**

<b>Participants</b>	<b>Number Participants per Program</b>	<b>During Visits and Planning Phase (4 to 9 months)</b>	<b>During Implementation Phase (1 to 2 years)</b>
<b>Local Citizens &amp; Leaders</b>			
		<i>Total Hours Per Person</i>	
Overall Coordinator	1	70	40
Other Leadership Team Members	3-4	45	30
Task Force Members	25-30	20	20
Volunteer Visitors	25-30	10-20	0
Firm Owner/Operators	30-100	1	0
<b>Technical Assistants</b>			
BR&E Consultants <sup>12</sup>	1	100	30
Computer Technician	1	24-45	0
Report Writer	1	100	0
Professional Review Team	15	5	0

\* Includes time spent in meetings. Time spent on implementing projects varies considerably based on priorities identified and individual skills.

## Cost of Doing the Applied Research

On the research side, estimating the costs are easier. There are costs for entering the data, doing the computer work, analyzing the results and writing the reports, printing the reports, and traveling to the community to present the results. Together with the time and travel of the BR&E Consultants, these average about \$15,000 per program.

## Fees Charged to Communities

The fees range from zero to \$15,000 per program. The difference between the costs and fees is paid from a variety of public and private agencies depending on the state.

You'll need to check with your state's sponsoring agency to determine the fees in your area.

## Other Local Costs

In addition to program fees, you need to plan for expenses associated with mailings and meeting expenses. Plan on postage and photocopy expenses of about ten dollars per firm targeted for a visit. Effective volunteer participation also requires mailing of meeting notices. Volunteer participation is usually enhanced if a small amount of money is available for light refreshments at meetings. Recruiting a strong Local Leadership Team is critical to obtaining sufficient financial support for an effective program.



## WHAT ASSISTANCE IS PROVIDED BY UNIVERSITIES, STATE AGENCIES, AND OTHERS?

One hundred percent of the most successful BR&E Visitation Programs have written reports.<sup>13</sup> The written research report is important because it summarizes the data from your surveys and presents it in a strategic problem-solving framework. In addition, the report (or a written summary) should show which projects your group considered and which were adopted as priorities. The report should list the problems (as reported by firms visited), the solutions (as developed by the Task Force and others), and commitments to act (i.e., the names of persons on your Task Force who agree to help with specific projects).

Is it better to have an outside researcher write the report or to have a local person do it? It is not necessary to have an outside researcher write the report, but there are several advantages if you do:

- Objectivity on causes of local problems.
- New perspectives on potential solutions.
- Access to a range of expert opinions and resources.
- Professionalism in the content and presentation of the report.

Many states have a state level organization that analyzes the data and prepares the research reports. In some states this is done by faculty at a University, often those working with the Cooperative Extension Service. In other states, the Department of Development or a utility company handles this. Check with your state development agency, your local development professionals, or your county extension office for information on who does this in your state. Alternatively, you can obtain a list of researchers from the Business Retention and Expansion International Web Page (<http://www.brei.org>).

## HOW CAN I LEARN MORE ABOUT THIS PROGRAM BEFORE I DECIDE?

### Visit Other Towns

Your best bet is to talk with local leaders in a community that has done the program. If you have the time and funds available, travel to one of these communities to visit with their Leadership Team and members of their Task Force.

### Speaker Phone

If you don't have either time or funds available, however, an excellent alternative is to watch the video that comes with these materials and then interview one or more local leaders from another program by using a speaker phone. (Note: We've had excellent results with this method of contacting leaders in other towns. There are tips on how to make this work in the booklet: *Using the Video to Introduce the Program and Train Volunteers*.) For names and phone numbers of persons to call, contact your state BR&E sponsor or check the BREI web page: (<http://www.brei.org>).

### Contact a Certified BR&E Master Consultant

Other excellent sources of information are Certified BR&E Master Consultants. These individuals have received specialized training on the process of organizing a BR&E Visitation by Business Retention and Expansion International. They not only have received specialized training but are also backed by a national mentoring system. These consultants provide assistance to local groups wishing to start BR&E Visitation programs and often do this at no charge as part of their current employment.



## **APPENDIX A: GLOSSARY OF TERMS IN BR&E VISITATION PROGRAMS**

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The terms used in BR&E Visitation Programs evolve and change over time as we learn more about what works and what doesn't. Here are some common terms used in these booklets and their synonyms used in earlier handbooks or publications.

### **BR&E Commencement Meeting**

Meeting at which the community learns about the priorities set by the Task Force, and starts on the implementation phase.

### **BR&E Retreat**

Four hour meeting of Task Force to set priorities for future BR&E projects.

### **BR&E Visitation Program**

Name of the entire process outlined in these manuals. **Synonymous terms (used in other publications): BR&E Programs or R&E Programs.** These terms really refer to a much broader set of programs than the BR&E Visitation Program. But many BR&E professionals use these synonyms anyway. It always pays to clarify this.

### **Business Resources Coordinator**

Person who quarterbackes the Leadership and Task Force on responding to the immediate concerns of the firms. **Synonymous terms (used in other publications): Red Flag Consultant or simply BR&E Consultant.**

### **Certified BR&E Master Consultants**

Persons who coach community leaders on how to implement local BR&E Visitation Programs. **Synonymous term used in other publications: State BR&E Staff.**

### **Implementation Resources Meeting**

Meeting of outside agencies or groups to see how their programs are related to BR&E projects and to explore the potential for collaboration.

### **Media Coordinator**

Person who coordinates media coverage for the program and coaches the Leadership Team in working with the media.

### **Milestone Meeting Coordinator**

Person who coordinates the major meetings (retreat, implementation resources, and commencement).

**Synonymous term (used in other publications): Retreat and Meeting Coordinator.**

### **Red Flag Issues**

Urgent situations in a firm that require immediate attention.

**Synonymous term: short-run, urgent problems**

### **Visitation Coordinator**

Person who quarterbackes the Leadership Team until the firm visits are done.

**Synonymous term: Coordinator.**



## RESEARCH CITED AND END NOTES

<sup>1</sup> This booklet complements Chapter 11 of Morse, George W., 1996, *BREI Consultant's Guidebook: Course for the Certification of BR&E Master Consultants*, Department of Applied Economics, University of Minnesota.

<sup>2</sup> Kraybill, David S., 1995, "Retention and Expansion First," *Ohio's Challenge*. Department of Agricultural Economics, Ohio State University, Columbus, OH. Vol.8, Issue 2, pp. 4-7.

<sup>3</sup> This coordinator is called the "Red Flag Coordinator" in the *Consultant's Guidebook*.

<sup>4</sup> Allanach, Christopher B., 1995, "The Market for and Impacts of Business Retention and Expansion Programs," MS Thesis, Department of Applied Economics, University of Minnesota.

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>5</sup> McLaughlin, Robert T., 1990, "Making Connections through R&E: An Educator's Case Study," in G. Morse (ed.) *The Retention and Expansion of Existing Businesses*. Iowa State University Press, pp. 166-182.

<sup>6</sup> McLaughlin, *op. cit.*, pp. 172. While this is a quote of a local leader, the authors have seen a number of programs which had problems. There are risks, especially if the basic principles are not followed.

<sup>7</sup> Smith, Thomas R., George W. Morse, and Linda M. Lobao, 1992, "Measuring Impacts of Business Retention and Expansion Visitation Programs," *Journal of Community Development Society*, Vol. 23, No. 1, pp. 127-128.

<sup>8</sup> Loveridge, Scott and Thomas R. Smith, 1992, "Factors Related to Success in Business Retention and Expansion Programs," *Journal of Community Development Society*, Vol. 23, No. 2, pp. 73-74.

<sup>9</sup> Morse, George, 1993, "Retaining and Expanding Local Businesses: Strategies to Build Successful Programs" in *Building Your Community's Future Satellite Programs on Community Economic Development*. Illinois Institute for Rural Affairs, Western Illinois University, pp. 21-25.

<sup>10</sup> McLaughlin, *op. cit.*, pp. 176-180.

<sup>11</sup> Morse, George W., Robert McLaughlin, and Ellen Hagey, 1990, "Success Stories in R&E Business Visitation Programs," in G. Morse (ed.) *The Retention and Expansion of Existing Businesses*. Iowa State University Press, pp. 137.

<sup>12</sup> This estimate assumes the BR&E Consultants provide the assistance outlined in the booklet: *Initiator's Manual for Starting New BR&E Visitation Programs*. If the Consultant also plays the role of the Local Coordinator, the time will be the sum of the various roles.

<sup>13</sup> Loveridge and Smith, *op. cit.*, pp. 73-74.

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**Scott Loveridge** directs the BR&E Visitation Program in West Virginia. Over the past six years, he has done extensive evaluation research on the impacts of BR&E Visitation Programs. The findings from this research have led to a number of changes in the approaches used by BR&E professionals and community leaders. He is extension associate professor, Division of Community and Economic Development, West Virginia University Extension Service, Morgantown, West Virginia.

**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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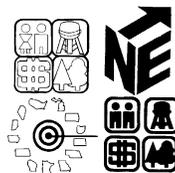
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