City of East Bethel
Economic Development Authority Agenda
***Regular Meeting – 6:30 p.m.**
Date: March 16, 2015

- **Please note Special Time**

AGENDA

	Item	
6:30 PM	**1.0**	**Call to Order**
6:31 PM	**2.0**	**Adopt Agenda**
6:33 PM	**3.0**	**Approve February 23, 2015 Meeting Minutes**
6:35 PM	**4.0**	**Presentation: Business Retention & Expansion**
7:45PM	**5.0**	**Open to Business**
7:50 PM	**6.0**	**Business Development Report**
7:55 PM	**7.0**	**Chamber Report**
8:00 PM	**8.0**	**City Council Report**
8:05 PM	**9.0**	**Other Reports**
8:10 PM	**10.0**	**Adjourn**

EAST BETHEL ECONOMIC DEVELOPMENT AUTHORITY MEETING

February 23rd, 2015

The East Bethel Economic Development Authority (EDA) met for a regular meeting on February 23, 2015 at 7:00 P.M at City Hall.

MEMBERS PRESENT:	Dan Butler*	Brian Bezanson	Steve Voss	Julie Lux
	Brian Mundle	Doug Welter	John Landwehr	

MEMBERS ABSENT: None

ALSO PRESENT: Colleen Winter, Community Development Director
Jack Davis, City Administrator

* Chairperson

Call to Order Mr. Butler called the meeting to order at 7:00 pm.

Adopt Agenda **Mr. Butler motioned to adopt the February 23, 2015 agenda. Mr. Welter seconded; all in favor, motion carried unanimously.**

Approval of Meeting Minutes – January 26, 2015 **Mr. Bezanson motioned to approve the minutes as written. Mr. Voss seconded; all in favor. Motion carried to approve the minutes.**

Open to Business This program is designed to help entrepreneurs and small business owners grow in the communities where they live and work. (Attachment 1) It is offered through the Metropolitan Consortium of Community Developers (MCCD). As a community in Anoka County we are able to participate in this program at no cost to the City for the first year. Business service specialists are deployed out in the communities and are able to provide one-on-one assistance customized to meet individual business needs. MCCD also offers financing but this is not their primary focus.

Kathleen DuChene is our local contact. She has extensive experience both as a small business owner/entrepreneur and working for large corporations. Ms. DuChene will have office hours at City Hall. She will be available to meet with individuals or groups who have a business idea, or is interested in starting a business, or may have a business in the community. She can assist them with marketing, finance, business plans. Once a project has been developed they can then meet with the City's Economic Development staff.

Ms. Winter met with MCCD representatives two weeks ago to learn about the program. Ms. DuChene has already met with a community member who has a small business and is hoping to expand it.

Members discussed options for getting the word out about this resource. It will be advertised on the website and brochures are available at City Hall. The Chamber is expected to have it on their website as well.

Mr. Welter asked how information would be shared between the MCCD staff and the City. “How do we know what they’re doing and who they’re talking to?” Ms. Winter stated that she was not aware of a formal method of communication so far but she believes their follow up process is very good. Ms. DuChene let the staff know as soon as she met with the community member. Ms. Winter plans to contact Ms. DuChene to discuss the communication process.

Mr. Voss asked how future years would be funded once the initial year is past. Ms. Winter reported that the total fee is $5 – 10,000 but she did not know how much if any of that might be picked up by the county. Mr. Voss suggested that additional information might be helpful for including funding for the program in the FY 2016 budget.

Mr. Welter asked how this program works with the Business Retention and Expansion (BR&E) Program Ms. Winter stated she felt this program is similar to the “SCORE” (stands for Service Corps of Retired Executives but “That acronym has not been used for many years”) program where retired executives meet individually with business people to offer business advice. The BR&E Program works more at a macro level where this program is more at the micro level. There does not appear to be any redundancy in the programs.

Mr. Butler wondered how the MSSD staff might interact with City staff to help build materials and brand for the city. We can call the program “East Bethel is Open to Business”.

Ms. Winter plans to invite Ms. DuChene to present at the next EDA meeting.

Future Service Roads

Jack Davis, City Administrator discussed future service roads projects and the latest developments as it relates to MNDOT and Met Council.

City officials and Staff met with representatives from MnDOT, Anoka County, MET Council and Ham Lake on January 29, 2015 to discuss Highway 65 issues and needs between 181st Ave. and Viking Boulevard. Among the items discussed were service road projects on both the east and west side of Highway 65, traffic lights, need for the upgrade of the intersection of Viking Boulevard and Hwy. 65 and an updated study for Hwy. 65.

There was discussion at length in regards to the history of and the short and long term needs for a signalized intersection between 181st Ave. and 187th Lane. While none of these intersections in this area currently meet MnDOT standards for a light, a traffic signal was not ruled out as an option for traffic control should development occur that would generate the traffic volumes required for the installation of a signal.

There was a review of the potential sites for development in this area and the need for service roads to access these properties. The necessity of the service roads was stressed as a means to stimulate additional interest in this area from developers. Staff reviewed the service road options with the group.

Staff requested that MnDOT and MET Council consider additional and new funding for these projects. MnDOT advised, that in addition to the Cooperative Agreement Grants, Safety Capacity Funds are available to the City in the amount of $1,000,000 in 2020 and there is a possibility that these monies can be advanced. MnDOT will advise us of the availability of these funds at our next meeting in March. Representatives from Metropolitan Council were requested to provide funding information and stated that they would look to see what options exist in their system for funding service roads and utilities.

Tom Collins, City Engineer for Ham Lake, attended the meeting. Both Cities indicated they will coordinate their plans for service roads in and around 181st Ave. to avoid any issues with alignments and schedules.

City Staff scheduled another meeting on February 25th to continue discussion on MnDOT and MET Council funding options and provide these groups with additional information on potential projects. Staff and City Council will be developing preliminary cost estimates for the options previously presented for the West Side Service Roads and prepare a project and estimated costs for the East Side.

MnDOT suggested $500K for two portions of the project, one to exit the north side of the property via Buchanan St NE, Taylor St NE or 189th Ave NE to Jackson and another $500K to possibly fund an exit via Buchanan Ave S. They left the choice of projects to use the funding for up to the City as long as it does not include an exit to Hwy 65.

Another option that was presented was for a service road on the east side of Hwy 65, coming down south from Viking Blvd to Briarwood. This might be a possibility in place of using the money for an exit south to 181st on the west side of 65. Attendees at the meeting also discussed the possibility of upgrading a stoplight at County Road 22. There has been an issue with people having difficulty getting across and it was felt that adding a frontage road would lead to increased problems.

Mr. Davis related the options included two projects for the East side of 65 and two for the West side. The project going north to
Viking Blvd or Jackson St is the most “ready to go” at this time. The Road Commission previously made a recommendation for a project going out to Jackson St to access the theatre and the Classic Commercial Park. There have been some suggestions and even opposition to this recommendation. An option to build an access road straight north along Buchanan to County Road 22 has been deemed the least appropriate option due to the extensive excavation required in order to get a substantial subgrade for the road and it is also the most expensive option.

An alternate proposal is the route north on Buchanan to 189th, west to Taylor St and north on Taylor to County Road 22. This would be better than the Jackson St option because it would intersect with County Road 22 closer to Hwy 65 but it is also a more expensive option. The cost estimate is approximately $2.3 million which includes a stoplight at County Road 22. Mr. Davis stated that Anoka County standards no longer require a stoplight at this intersection which would bring the cost down closer to $2 million. The Jackson St option would be about $1.4 million. The cost of the Taylor St option would be funded through MSA and Street Capital funds and possible Intersection Safety funding and Cooperative Agreement Grants.

The Road Commission has changed their recommendation to the Taylor Street option. This will eliminate concerns about additional traffic on Jackson St, particularly heavy trucks and the Taylor St option would come out closer to Hwy 65 possibly making it a more viable frontage road with the eventual possibility of continuing on Buchanan south to 181st at some point in the future.

Mr. Bezanson asked about funding the utility changes required. Mr. Davis stated that the utilities are part of the plan.

Mr. Butler asked about the potential for extending a service road to continue south from Taylor St. Mr. Davis responded that it would be less expensive but there would be no secondary benefit from this option. There is less property available for development in the area and it is already accessible. It would require more negotiations with property owners for right of way, etc. and the road would ultimately come out on 181st at an uncontrolled intersection.

Mr. Butler asked what the chances are of getting a stoplight at the planned intersection of Taylor and Viking Blvd. Mr. Davis estimated the cost at $3-4,000 for a stoplight. He explained the formula for funding a light with the County paying approx. 25%.

Mr. Landwehr asked if the businesses on the East side of Hwy 65 would receive any benefit. The businesses are on property that is fairly deep and might consider subdividing the property with access roads on both sides. Mr. Davis stated that the current frontage road will need an overlay in the next 2-3 years and there are some drainage problems in the area.

Mr. Butler related strong interest among businesses on the East side to get hooked up to sewer and water and asked about this possibility. Mr. Davis agreed that the businesses would like to have sewer and water which would cost $15 – 20K to hook up. It would cost the City $2 million (fix drainage problems, repair road surface) but would return only $180K. The decision was made not to pursue extension of sewer and water.

Business Development Report

• Shaw Trucking has begun the preliminary grading work at Viking preserve.
• Classic Commercial Construction applied for and received an Interim Use Permit for a major mining operation (black dirt) at 1965 Briarwood LN NE
• Rivard Companies, 19801 Hwy 65 NE constructed a new 5,400 ft. storage facility
• MN Fresh Farm, 20241 Hwy 65 NE is constructing a new storage building, and refacing their existing barn for the expansion of their operations
• Issued an Interim Use permit, home occupation to Justin Donnell, 3601 228th Ave NE for a hydrographics business
• Issued a Conditional Use permit to Dan Schulz (dba: Builders by Design) for the relocation of their business to 21058 Davenport St (former Flex Fitness bldg).

Ms. Lux asked how much of the space in the Flex Fitness bldg. had been purchased. Ms. Winter related that Builders by Design purchased the whole building but may have 3,000 sq ft available to lease out.

Mr. Butler noted an article regarding grocery stores and asked about the status of adding a store to the community. Mr. Davis stated they had met with potential business owners and further discussion is ongoing.

Ms. Winter presented the Piwik Analysis. (Attachment 2)

Mr. Voss noted that Hunter's Inn received their liquor license and will be re-opening in the near future.

Chamber Report

Mr. Welter reported a meeting was held on February 12th. There were presentations on City finance, Mayor Voss spoke and Mr. Dan Richardson shared information about his business. There were several new people in attendance. Mr. Voss noted that he met someone at the meeting who is considering restarting their business in the community.

City Council Report

Mr. Mundle reported that the Council meetings will begin at 7pm starting in March. Mr. Troy Lachinski trained members of the Council and others on CPR (Cardio Pulmonary Resuscitation) and AED (Automatic External Defibrillator) use prior to the last Council meeting. This is part of an effort to have East Bethel named a "Heart Safe City". Mr. Lachinski's goal is to have 10% of the City population trained by the end of the year. Mr. Mundle suggested the Chamber might consider inviting Mr. Lachinski to a meeting to present his project.

Other Business

Mr. Mundle shared that the new Chair of the MET Council was interviewed recently on MN Public Radio. He felt the interview was interesting and encouraged members to consider listening to it online. Mr. Voss related that he and Mr. Davis will be meeting with the Chair of MET?? Council for a tour of the Waste Power???? Plant and offered to bring any information put forth by the EDA to the Chair for discussion.

Mr. Davis shared with members that there have been statements made in the past that East Bethel is not good for business owners. He related two recent events where owners benefitted from staff working very hard to expedite issues that were required in order for the owners to proceed with their plans. Mr. Landwehr suggested asking if those owners and others might be willing to provide comments/testimonies sharing those good experiences with the community and other potential business owners. Mr. Davis agreed this should be considered for the City website.

Mr. Butler requested a demonstration of the GIS system at the next meeting. Ms. Winter agreed to provide a presentation.

Adjournment **Mr. Bezanson made a motion to adjourn the meeting at 8:00 p.m. Ms. Lux seconded; all in favor, motion carried.**

Submitted by:
Susan Lori Irons
Recording Secretary

City of East Bethel
Economic Development Authority
Agenda Information

** *

Date:
March 16, 2015
* *

Agenda Item Number:
Item 4.0
* *

Agenda Item:
Business Retention and Expansion program
* *

Requested Action:
Recommend approval of $7,000 to be spent on the BR&E program. Please note that Connexus has committed $5,000.00 towards the program. The total cost is $12,000.00.
* *

Summary:
Please find attached in your packet materials related to the BR&E program. Adeel Ahmed, Associate Extension Professor / Extension Educator with the University of Minnesota will be presenting the various stages of the BRE and a sample plan of work. Please disregard the dates in the PPT. They are only there to give you an idea of how various meetings and deadlines are spread out. The PDFs provide in depth information as to the content of the meetings and the time commitment required by volunteers.
* *

Attachments:

1.) BR&E PowerPoint
2.) Visitation program – two manuals

* *

CITY OF RICHMOND

BUSINESS RETENTION &

EXPANSION PROGRAM

UNIVERSITY OF MINNESOTA | EXTENSION

TODAY'S AGENDA

- Introductions
- Quick overview of BR&E Program
- Leadership roles and Responsibilities
- Set Future Meeting Dates and Times
- Go over Project management tools
- Set Next meeting
- Adjourn

GOALS OF A BR&E PROGRAM

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

BR&E FLOW CHART

RESEARCH Step 1

Inform community about BR&E

Organize the Leadership Team

Organize the Task Force

Practice visiting businesses

Finalize the survey instrument

Train visitors

Visit businesses

Tabulate survey data

PRIORITIZE Step 2

Review warning flags

Respond to individual concerns

Analyze survey data

Write research report

Retreat to set priorities on systemic issues

Design priority projects

Write Summary report

Commence to implementation

IMPLEMENT Step 3

Work on project teams (continuous)

Sustain leadership team

Update on projects – 1st quarter Task Force

Update on projects – 2nd quarter Task Force

Update on projects & plan to sustain BR&E – 3rd quarter Task Force

Evaluate Results

Prepare Evaluation report(s)

Update on projects – 4th quarter Task Force
Sustain or conclude BR&E

University of Minnesota | Extension

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WHO IS INVOLVED?

- Leadership Team………..4 or 5 persons
- Task Force…………….....15-30 persons
- Visitors (above plus)…......15-30 more
- Firms Visited……………....30-100 firms
- Consultant……………….....1
- Regional or State staff…....2-3

THE TASK FORCE (WHO)

- **Between 20 and 30 people including a 5 person leadership team**
- **Characteristics**
  - Recognized and respected community leaders
  - Representative of all segments of the community
  - Ability to work easily with others
- **At least four major groups represented**
  - Local development professionals
  - Business owners/operators
  - Local government officials
  - Educators
  - Plus, other community groups with an interest in community development

FIRST STEPS

- Secure City Council approval
- Secure Funding
- Organize a project leadership team
- Recruit a task force community leaders
- Form relationships with media outlets
- Develop a Plan of Work

SECOND SET OF STEPS

- Finalize Survey Instrument and Business list
- Train Volunteer Visitors
- Survey Businesses
- Review surveys for Warning Flags
- Discuss Results of Survey
- Develop Strategies, Goals and Projects
- Implement Projects

OVERALL COORDINATOR OR LEADERSHIP TEAM CHAIR

(OFTEN SERVES AS ONE OF THE ABOVE)

- Help other members of the Leadership Team
- Visit firms
- Coordinate/Chair Leadership Team and Task Force
- Up to 70 hours during Phase 1 (4 to 9 mos.); 40 hours in Implementation, Phase 2 (1-2 years). Number of hours depends on whether s/he performs another leadership role as well

VISITATION COORDINATOR

- Help other members of the Leadership Team
- Visit firms
- Identify and recruit Task Force
- Identify firms to be visited
- Coordinate Practice Visits
- Coordinate Visitation Volunteer training
- Mail copies of surveys to the researcher
- 45 hours during Phase 1 (4 to 9 mos.); 30 hours in Implementation, Phase 2 (1-2 years)

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
- 45 hours during Phase 1 (4 to 9 mos.); 30 hours in Implementation, Phase 2 (1-2 years)

BUSINESS RESOURCES COORDINATOR ("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 fact sheet on development programs
- Mail thank you notes and localized fact sheet 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
- 45 to 60 hours during Phase 1 (4 to 9 mos.); 30 hours in Implementation, Phase 2 (1-2 years)

MEDIA COORDINATOR

- Help other members of the Leadership Team
- Visit firms
- Establish contacts with the media
- Use Social Media tools (Blog, Facebook, Twitter) to communicate with public
- Provide copy to media
- 45 hours during Phase 1 (4 to 9 mos.); 30 hours in Implementation, Phase 2 (1-2 years)

LEADERSHIP TEAM

Name	Representing	Role	Phone	Email
	Richmond EDA	Overall Coordinator		
	Private Biz	Media Coord		
	Private Biz	Meeting Coord		
	Concerned Citizen	Business Resource Coord		
	City of Richmond	Visitation Coord		
Adeel Ahmed	U of MN	BRE Consultant	320-203-6109	ahme0004@umn.edu

TASK FORCE 1/2

Name	Representing	Phone	Email

TASK FORCE 2/2

Name	Representing	Phone	Email

PLAN OF WORK PG 1/2

Item	Date due	People
Leadership team (LT) training	22 Oct 2014	**LT**
LT meeting to finalize survey & Business selection	Nov 12 – wed – 5pm	
Task force orientation meeting		
Business Selection	**1st draft by Nov 12th/ Final by Jan 14th (fluid)**	**LT**
Survey 1st draft	**1st draft Dec 3rd**	
Survey finalization	**Final by Jan 14th**	**LT**
Contact businesses to be surveyed (phone or mail)	Mass mailing – by Jan 8th	Visitation coordinator, LT
*Recruit volunteers and task force (TF) to interview businesses	Ongoing until Jan 20	Volunteer Coordinator, LT
Leadership Team visitation training	Dec 4th	
Practice BR&E Visits by leadership team	Before jan 15	

PLAN OF WORK PG 2/2

Item	Date due	People
Preliminary survey results compiled		Analyst
Campus Research Review mtg	**Weekday – daytime – april 15th**	LT, TF
BR&E written report completed		Analyst
Task Force retreat (4hr mtg)	May 15th	LT & TF
Implementation resources & Project planning mtg	June1st	LT, TF, other volunteers
BR&E Report summary with Selected projects		
Community Commencement mtg	June15th	Everyone
Project implementation meeting #1		
Project implementation meeting #2		
Evaluation Meeting		
Project implementation meeting #3		
Project implementation meeting #4- final?		

IMPLEMENTING

LOCAL

BUSINESS

RETENTION

AND

EXPANSION

VISITATION

PROGRAMS

B R & E

BUSINESS RETENTION & EXPANSION
VISITATION PROGRAM

IS IT FOR OUR COMMUNITY?

George Morse and Scott Loveridge

NERCRD
Publication
No. 72

About these Materials

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

Brochures on BR&E Visitation Program

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

Is It for Our Community?

This booklet gives a more detailed overview of the program.

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

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

BR&E Visitation Video

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

Using the Video to Introduce the Program and Train Volunteers

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

Local Leadership Team Manual

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

Visitation Coordinator Manual

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

Are We Speaking the Same Language?

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

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

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

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

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

Authors

Scott Loveridge is extension associate professor at West Virginia University, Morgantown, West Virginia.

George Morse is professor and extension economist at the University of Minnesota, St. Paul, Minnesota.

Penn State Printing Services
250, 8 M 4/97

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

CONTENTS

IS A BR&E VISITATION PROGRAM FOR YOU AND YOUR COMMUNITY?[1]

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?

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%.[2] 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?

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?

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.

Stage 1: Firm Visits

Activity	***Who Does It***
Organize Local Task Force	Leadership Team/Consultant
Recruit Firm Visitors	Task Force
Train Firm Visitors	Leadership Team/Consultant
Visit Firms	Volunteers and Task Force

Stage 2: Immediate Follow-up

Activity	***Who Does It***
Review surveys	Task Force/Consultant
Assist Firms	Task Force and Others

Stage 3: Data Analysis and Recommendations

Activity	***Who Does It***
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

Stage 4: Commencement Meeting and Implementation

Activity	***Who Does It***
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.[3]

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.[4]

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

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 mangers) 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

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:[5]

- **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?"[6]

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.[7] 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.[8] 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.[9]

- **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[10] (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.[11] 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

Participants	Number Participants per Program	During Visits and Planning Phase (4 to 9 months)	During Implementation Phase (1 to 2 years)
Local Citizens & Leaders		*Total Hours Per Person*	
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
Technical Assistants			
BR&E Consultants[12]	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.[13] 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

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 quarterbacks 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 quarterbacks the Leadership Team until the firm visits are done.
Synonymous term: Coordinator.

RESEARCH CITED AND END NOTES

[1] 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.

[2] 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.

[3] This coordinator is called the "Red Flag Coordinator" in the *Consultant's Guidebook.*

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

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[5] 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.

[6] 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.

[7]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.

[8] 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.

[9] 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.

[10] McLaughlin, *op. cit*., pp. 176-180.

[11] 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.

[12] 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.

[13] Loveridge and Smith, *op. cit*., pp. 73-74.

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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.

BUSINESS RETENTION AND EXPANSION VISITATION PROGRAM

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Programs of the regional rural development centers are available equally to all people.

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IMPLEMENTING

LOCAL

BUSINESS

RETENTION

AND

EXPANSION

VISITATION

PROGRAMS

BR&E

BUSINESS RETENTION & EXPANSION
VISITATION PROGRAM

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

George Morse and Scott Loveridge

NERCRD
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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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CONTENTS

INTRODUCTION

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

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

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

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

Self-Study or BR&E Consultants?

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

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

"Luck" happens when preparation meets opportunity. To increase your teams luck with this program, you will need to prepare well. Most teams hire coaches to help with this preparation. In states which have state level BR&E Programs, we encourage community leaders to use Certified BR&E Consultants to coach them on the program. Their role is outlined in the next section of this booklet.

ASSISTANCE FROM A CERTIFIED BR&E CONSULTANT

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

Role of BR&E Consultants

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

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

Trips to Community by Certified Consultants

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

Here are the typical trips and the type of assistance provided to a community. Details on each of the first four trips follow later in this booklet. Details on trips five through eight are covered in the other booklets in this series. If your BR&E Consultant lives far away from your area, many of these meetings can be done by speakerphone.

Trip 1: Meeting with Leadership Team
This introductory meeting is often held with a small group of four to six persons to introduce the program. While some states ask the local group to do this one on their own, the Consultants will assist in providing the names of citizens in other communities that have done the program. This makes it easier for the team to check out the program.

Trip 2: Meeting with Leadership Team
This session explores the roles of local citizens and ways to recruit them.

Trip 3: Meeting with Leadership Team
At this session, the Leadership Team completes its plan of work in preparation for the Volunteer Visitor training.

Trip 4: Task Force Meeting and Practice Visits
The Consultant goes on two practice visits with the Leadership Team and then meets with the Task Force to explain the program. Generally, the Consultant provides the basic survey, with the community able to add three or four local questions.

Trip 5: Volunteer Visitor Training
The Consultant provides the primary leadership for this session to train the volunteers. However, he/she will want to have two or more members of the Leadership Team to lead parts of the training.

Trip 6: "Red Flag" Meetings
The Consultant goes to at least one of the two or three meetings held to deal with the "red flag" issues (those with immediate urgent concerns). At this meeting the Consultant will coach the group on the process for dealing with red flag issues. The role of the Consultant is to explain the process and answer questions. The Task Force members make all of the decisions on what to do about local red flags.

Trip 7: Task Force Retreat
Together with the researcher who has analyzed the data from the firm visits, the Consultant and the Leadership Team lead this meeting. Again, the Task Force makes all of the decisions on priority projects.

Trip 8: Community Commencement Meeting
The Consultant shows the Leadership Team formats that other communities have used and plays a minor role in the presentations.

Trips 9 to 12: Quarterly Meetings of Task Force
After the completion of the planning phase of the BR&E Visitation Program, the Task Force should plan to meet at least quarterly over the next year. Groups that no longer meet once the plan is developed seldom implement their plans. The Consultants attend these meetings, although their role is much more open ended. Often they can provide contacts to state and regional development professionals that can help the local implementation teams.

Business Retention and Expansion International Certification

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

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

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

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

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

LEADERSHIP TEAM ORIENTATION

The five basic steps of the Leadership Team orientation are:

Meeting 1: Is it for Our Community?
Meeting 2: Volunteer Roles in BR&E Visitation Programs
Meeting 3: Plan of Work
Meeting 4a: Practice visits to Two Firms
Meeting 4b: Task Force Orientation

Meeting 1: Is It for Our Community?

Participants:

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

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

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

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

Handouts at Meeting:

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

Suggested Agenda (about two hours):

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

Handouts for next meeting:

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

Details on the meeting:
See the booklet - *Using the Video to Introduce the Program and Train Volunteers*

Participants in Meeting 1:
Some local initiators prefer to keep the attendance at this first meeting small until a group of four to six local leaders has a chance to carefully study the program and be prepared to answer questions on how it might work when the larger group meets. In other cases, the local initiators prefer to have the larger group attend this meeting and give their blessing to exploring the program further. There are pros and cons to both approaches. Those using the first will be able to answer more questions about how this differs from past attempts at BR&E and what the benefits and costs would be. Those using the second will know if the group is behind them from the start.

Meeting 2: Volunteer Roles in BR&E Visitation Programs

Participants:

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

Purpose:
By the end of the meeting the participants will:

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

Distribute in Advance:

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

Suggested Agenda (about two hours)

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

*Discussion Questions for Meeting #2 - Appendix A

Handouts for Next Meeting:

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

Discussion of the agenda:

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

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

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

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

Meeting 3: Plan of Work

Participants:

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

Purpose:

By the end of the meeting the participants will have:

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

Distribute in Advance:

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

Suggested Agenda (about two hours):

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

*Discussion Questions for Meeting #3 - Appendix A

Discussion of the agenda:

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

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

Meeting 4a: Practice Visits to Two Firms

Participants:

1) Leadership Team

Purpose:

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

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

Distribute in Advance:

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

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

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

Meeting 4b: Task Force Orientation

Participants:

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

Purpose:

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

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

Distribute in Advance:

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

Suggested Agenda (two hours):

First Hour: Introduce the Program

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

Second Hour: Task Force Decisions

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

Discussion of Agenda:

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

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

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

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

HINTS ON INTRODUCING BR&E VISITATION PROGRAMS

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

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

Hint 1: Be sure you understand the program

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

Hint 2: Use the "Self Assessment Guide"

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

Hint 3: Use the Video on Sibley County

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

Hint 4: Share BR&E Research Report and Summary

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

Hint 5: Give Examples of Program Benefits

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

Hint 6: Contact Citizens in Other Communities

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

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

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

Does our program have:

1. A Visitation Coordinator who has completed the orientation?

2. A Business Resources Coordinator who has completed the orientation?

3. A Milestone Meeting Coordinator who has completed the orientation?

4. A Media Coordinator who has completed the orientation?

5. An Overall Coordinator who has completed the orientation?

6. A Task Force of twenty to forty local citizens who have been individually contacted?

7. A Task Force with the following groups represented:

Business leaders?
Development professionals?
Local government officials?
Educational professionals?
Other community leaders?

8. A Task Force that met as a group for orientation and decided to proceed with the program?

9. Written pledges from the Task Force members who agree to participate for at least two years?

10. Written endorsements from other local groups within the community to support the BR&E Visitation process?

11. A clear understanding of the guidelines for the program, including the role and costs, if any, of the State Sponsor or BR&E Certified Consultant?

12. A plan to get the data analyzed and the report written? (In most states this is done by the State Sponsor, and there may be a cost.)

13. A detailed work plan which lists the task to be done, the person handling it, and the target date? (Some dates can only be estimates beyond the Volunteer Visitor training.)

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

APPENDIX A: DISCUSSION QUESTIONS

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

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

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

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

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

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

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

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

Name____ Phone (____) ______________

Address ____

City _____________________________________State _________ Zip______________

Employer ____

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

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

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

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

YES, DEFINITELY
YES, PROBABLY
MAYBE
NO, PROBABLY NOT
NO, DEFINITELY NOT

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

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

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

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

Discussion Questions for Meeting #2:
Objectives and Local Leaders

1) What do you see as the most important benefit of the program?

2) What do you see as the primary difference in the roles someone on the Task Force would play versus someone who is a volunteer visitor? (See pages 9-11 of the booklet *Is It for Our Community?)*

3) In which of the coordinator positions would you be willing to serve?

4) Whom would you suggest for the other coordinator positions?

5) What support could you provide to each of the other coordinators?

6) Whom should we recruit to be on the Task Force?

Discussion Questions for Meeting #3: Plan of Work

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

Business Leaders
Development Professionals
Local Government
Educational Institutions
Other Community Leaders

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

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

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

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

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

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

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

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

APPENDIX B: TASK FORCE MEETING MINUTES

1) What was the agenda? (Attach , if desired)

2) Who attended? (Attach list with names, addresses, phones, employment, and public offices held)

3) What decisions were made?

APPENDIX C: PLAN OF WORK

Communities in program ____

BR&E Consultant: ____ Phone: _____________________

Leadership Team Members:

Overall Coordinator: ____ Phone: _____________________

Media Coordinator: ____ Phone: _____________________

Visitation Coordinator: ____ Phone: _____________________

Business Resources Coordinator: ___________________________________ Phone: _____________________

Milestone Coordinator: ____ Phone: _____________________

Task Force Members:

Business Persons:

Development Professionals:

Local Government Officials:

Educational Professionals:

Other Community Leaders

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

Preparations for the Volunteer Visitor Training

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

Before the Firm Visits Are Done:

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

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

Prepare mailing labels needed for program

a. Firms to be visited ____________________

b. Volunteer Visitors ____________________

c. Task Force members ____________________

Mail notice of volunteer training ____________________

Organize telephone tree for contacting volunteers on day of training ____________________

Mail letter and survey to firms ____________________

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

Get speaker phone, VCR, TV, overhead projector ____________________

Write a news release on BR&E Visitation ____________________

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

Preparations for Media Coverage

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

Applying for the program ____________________

Being accepted in the program ____________________

Training the volunteers ____________________

Visiting local businesses ____________________

Following up on industry's concerns ____________________

Special interest stories on unique products or services of local firms ____________________

Community Commencement Meeting ____________________

Implementation of specific recommendations ____________________

Preparations for Immediate Concerns or "Red flag" Review

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

Contact the state and/or federal agencies on assistance available ______________________________

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

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

Coordinate red flag follow-up by Task Force ______________________________

Preparations for Task Force Retreat

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

Make physical arrangements for retreat ______________________________

Send out written invitations for retreat ______________________________

Organize telephone network for retreat ______________________________

Preparations for Community Commencement Meeting

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

Make physical arrangements for retreat ______________________________

Send out written invitations for retreat ______________________________

Organize telephone network for retreat ______________________________

Implementation of Priority Projects:

Date of First Task Force Meeting After Community Commencement Meeting ______________________________

RESEARCH CITED AND END NOTES

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

[2] The certification course was used to develop this series of booklets.

[3] Various findings from these two research projects can be found in the following publications:

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

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

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

Acknowledgments

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Authors

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 lead 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.

BUSINESS RETENTION AND EXPANSION VISITATION PROGRAM

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Mississippi State University
Mississippi State, MS 39762-9656
(601) 325-3207

City of East Bethel
Economic Development Authority
Agenda Information

** *

Date:

March 16, 2015

* *

Agenda Item Number:

Item 5.0

* *

Agenda Item:

Open for Business

* *

Requested Action:

For Information Only

* *

Please find in your packet information on Anoka County's new Open to business program. This program is designed to help entrepreneurs and small business owners grow in the communities where they live and work. As a community in Anoka County we are able to participate in this program at no cost to the City for the first year. Business service specialists are deployed out in the communities and are able to provide one on one assistance customized to meet individual business needs. Kathleen DuChene is our local contact. She has extensive experience both as a small business owner/entrepreneur and working for large corporations.

Kathleen will be present at the EDA meeting to discuss the program in more depth.

City of East Bethel
Economic Development Authority
Agenda Information

** *

Date:
March 16, 2015
* *

Agenda Item Number:
Item 6.0
* *

Agenda Item:
Business Development Report – February 2015
* *

Requested Action:
For Information Only
* *

- Met with MNDOT, Anoka County Highway Department, Met Council, and Ham Lake to discuss future service road options. Based on that conversation City has been meeting with individual property owners for the purpose of securing future right of way. MNDOT is in the process of completing a study along the Highway 65 corridor to determine future service road options.

- Assisted East Bethel Chamber with membership drive

- Continue to work on BR&E project

- Met with Open to Business representatives

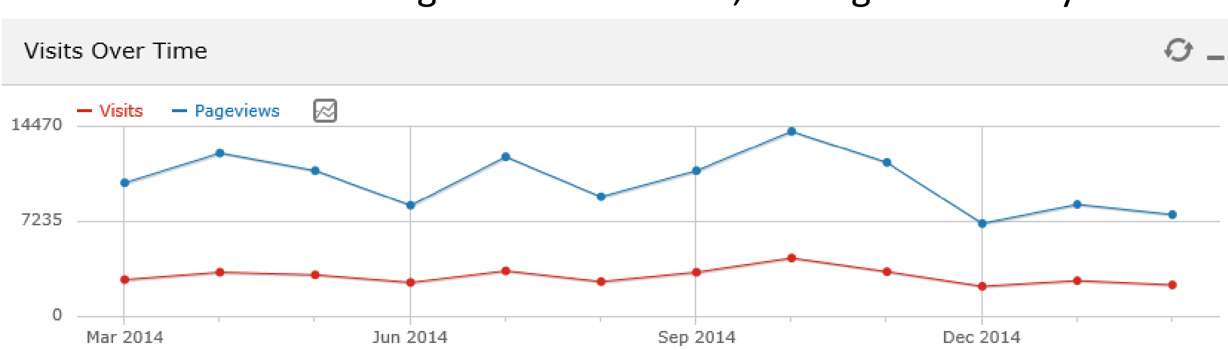
February 2015 Piwik Analysis

Most frequently viewed webpages this month		
Label	**Total Pageviews**	**Bounce Rate**
East Bethel, MN - Official Website	3515	33%
East Bethel, MN	1248	51%
City Council	287	34%
Building Inspections & Permits	234	14%
City Code	183	37%
City Maps	212	38%
Residents	107	25%
Agendas & Minutes	99	11%
Parks & Recreation	84	62%
Planning Commission	98	8%
Administration	65	50%
Economic Development	73	60%
Fire	69	42%
Economic Development Authority	75	25%
Senior Community Center	44	65%
Community Development	41	67%
Newsletters	51	17%
Building Permit Applications	44	100%
Government	40	0%
Road Commission	78	0%
Departments	37	40%
Finance	41	25%
Public Works	30	57%
Building Dept. FAQ	30	0%
Police	36	36%

Searches within our Site this month	
Searched	**# of searches**
hunting	4
building code	2
burning permit	2
clerk	2
don shaw	2
eagle ridge	2
ice arena	2
mids	2
ordinances	2
pet clinic	2
search	2
septic	2
septic survey	2
spill	2
zoning map	2
"city council meeting packet" ordinance "regulating sewage treatment"	1
(appendix a. sec. 42	1
74	1
763-367-7855	1
2006 comprehensive plan	1
18164 hwy 65 n school zone	1
20204	1
accesory building	1

26% of users viewed our site via mobile devices this month.

Visitors and Pageviews over time, Ending in February



Most Downloaded Document from our Website	
Document	# of times downloaded this month
East Bethel Resident Guide	149
Official Zoning Map of the City of East Bethel	63
Official Map of the City of East Bethel	31
Detached Accessory Structure Pamphlet	27
Official Shoreland Overlay and Wetland Map	22
2015 Fee Schedule	20