IMPLEMENTING

LOCAL

BUSINESS

RETENTION

AND

EXPANSION

VISITATION

PROGRAMS

B R & E

BUSINESS RETENTION & EXPANSION
VISITATION PROGRAM

VISITATION COORDINATOR MANUAL

Scott Loveridge and George Morse

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About these Materials

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

Brochures on BR&E Visitation Program

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

Is It for Our Community?

This booklet gives a more detailed overview of the program.

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

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

BR&E Visitation Video

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

Using the Video to Introduce the Program and Train Volunteers

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

Local Leadership Team Manual

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

Visitation Coordinator Manual

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

Are We Speaking the Same Language?

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

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

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

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

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

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INTRODUCTION

If you are the Visitation Coordinator for a local BR&E Visitation program, this booklet was written especially for you. This booklet will help you organize the firm visits, show you how to select firms, provide tips on training Volunteer Visitors, and instruct you on how to notify firms that they will be receiving a visit.[1]

Visitation Coordinator as Quarterback

Recall the discussion of the coordinators being quarterbacks of the Leadership Team and not the full team. If any of the coordinators need to operate as a quarterback and not the entire team, it is you - the Visitation Coordinator. You should look at your team as including both the Leadership Team and the full Task Force. The rest of your Leadership Team will become backup quarterbacks in helping you tap into the rest of the group.

DETAILS ON VISITATION COORDINATOR'S ROLES

As the Visitation Coordinator, you have the following roles and responsibilites:

1. Help other members of the Leadership Team.
2. Visit Firms.
3. Identify researcher to analyze the survey results.*
4. Select a BR&E Survey.*
5. Identify and recruit Task Force Members.
6. Identify firms to be visited.*
7. Coordinate the two "practice visits." *
8. Coordinate Volunteer Visitor training.*
9. Mail copies of survey to the researcher.

* If your program is working with a state sponsor that provides BR&E Consultants, he/she will either do the steps with the * or provide you with major assistance in doing these.

Help Other Members of the Leadership Team

While the day will come for helping them on their tasks, generally, they will be helping you. If you want a successful program, you will use them. Naturally, as part of the Leadership Team, you also serve on the Task Force.

Visit Firms

Everybody in the program visits firms. As Visitation Coordinator, you will do two "practice visits" before the Volunteer Visitor training. You might wish to visit a couple of additional firms also, but it is best to save some time for visiting firms that other Volunteers find they cannot make.

Identify a Researcher to Analyze Results

If you are doing this program through a university or state development agency, they will do this for you. If you are starting this without support from a university or development agency, you need to identify someone outside the community that can handle the applied research. Appendix A has some questions that you might wish to ask this person before you sign a contract. In every case be sure to ask for a sample of their earlier work and at least three references.

Select a BR&E Survey

Here are some considerations as you select a survey instrument or an interview quide.

An Interview Guide (Survey) Is a Must
Volunteer Visitors must have some type of survey or interview guide for their visits. Without it, each visitor is likely to ask different questions, and you will never get an overall picture of the concerns of your local businesses. Or worse yet, you might get a misleading view of their concerns since the impressions will depend on how articulate each visitor is in explaining the concerns they hear about from the firm they visit. Without a good survey instrument, one or two firms can dominate the picture.

Pros and Cons of Developing Your Own Survey
On the pro side, you can tailor your survey to your community's unique needs. (If you enjoy developing survey forms, you will have hours of fun!) On the con side, developing a good survey form is very time consuming and requires technical training. Even with technical training and experience, we find it takes a team of three or four professionals several months, working in collaboration with local leaders, to develop a new survey, to field test it, and then to revise it and prepare it for you.

We Recommend That You Don't Develop a New Survey
We have seen many places burn out on the process of developing a good survey and never actually getting to the visits. In other cases, they have used a poor survey, but didn't realize this until it was too late.

Don't take questions from other surveys and make your own either. Rather, pick the best complete survey from other areas. The reason for not taking a few questions from here and few from there is that the surveys often have "feeder" questions that introduce later questions. Also, you can better compare your results with one of the earlier programs if you use the full survey.

Where can we get examples of good surveys?
First, check with your state sponsor. If your state doesn't have a program, you can find names and addresses of consultants throughout the nation by connecting with the Business Retention and Expansion International website: (http://www.brei.org).

Identify and Recruit Task Force

The entire Leadership Team decides who will be on the Task Force. Participants should cover a wide range of local leaders and citizens as shown on page 10 of the booklet *Is It for Our Community?*. Once the group has been identified, each member of the Leadership Team needs to contact personally five or six Task Force members. The brochure and the insert on the Task Force which comes with this package can be used by the Leadership Team to help explain the program. Often individuals are invited to the first Task Force meeting without any obligation until after the meeting. The meeting can be used to introduce the program and to answer the questions of potential Task Force members.

Again, your job as coordinator is to organize this effort, not to do it all yourself.

A key step here is to get a complete list of names, mailing addresses, and phone numbers of those that agree to be on the Task Force. It is best to put the addresses on mailing labels or a computer program for repeat use.

After the full Task Force has been identified and personally contacted, a letter should be sent to them inviting them to a meeting at which the program is explained. Show segment 1 of the video as an introduction. (For tips on using this video effectively see the booklet: *Using the Video to Introduce the Program and Train Volunteers*.)

Task Force Recruits the Volunteer Visitors
Your job is to help them understand the number of visitors needed. (For example, for one hundred firms, you need fifty visitors if each team of two goes on four visits, sixty-six visitors if each team goes on three visits, and one hundred visitors if each team goes on two visits.)

See the booklet *Is It for Our Community?* for reasons volunteers participate in the program and benefits to them.

Identify Firms to be Visited

Obtaining a reasonably complete list of firms in your community is the first step in the selection process. Your state sponsor may be able to provide some assistance with this. Most people are surprised at how many firms are located within the community. They tend to forget about some of the smaller firms. If your state sponsor doesn't have a starter list, you may be able to develop a list through a combination of sources:

- Your state's department of commerce or development (licensed businesses)
- Phone book yellow pages
- Chamber of Commerce membership
- Commercial Business directory

Unfortunately, none of these sources will be complete or up-to-date. Most states issue licenses, but a licensed business may never open, or it may close. Some firms aren't listed in the yellow pages. Many firms do not belong to the Chamber of Commerce. Some business directories are now available on CD-ROM, providing a handy database of business addresses and phone numbers. This can save time later in the process. If someone on the Leadership Team has a computer that can read CD-ROM, it may be worthwhile to purchase a CD-ROM business directory. Most software stores carry CD-ROM phonebooks. Before you buy the business directory, check with local or regional libraries to see if you can access it through them. A CD-ROM usually has the ability to transfer information you select onto a diskette. This can be the core for your business database. Like other sources, however, it will likely be incomplete and slightly out of date You will need to verify and supplement any list that you use to start your database of local business addresses. Try to distinguish between manufacturing, retail, and service industries when you are establishing your list. Research has shown that communities with more successful programs focus on one type of firm—typically manufacturing.[2]

Once you start your list from one of the above sources, work with the Leadership Team or other people who know the local business community to examine the list for errors or omissions. Once you have assembled a final list of businesses, you are ready to select firms to be targeted for visits. Most communities prefer the following method for selecting businesses. First, choose firms that are "musts." These are typically the larger firms and/or the higher wage firms in the community. This means that the sample of firms you select to visit will not be totally random, but it will include firms that are considered the most important in the community.

After the most critical firms are selected, randomly select a *sample* of the remaining firms. Many methods are available for randomly selecting firms. Probably the simplest is to assign each firm a number and then draw numbers out of a hat until you have the appropriate number of firms.

Number of Firms to Visit
How many firms should you visit? Probably between thirty and one hundred. If you visit less than thirty, your future projects are based on a very small sample. If you try to visit over one hundred, your group is likely to burn out on the visits and not have time to respond to the firms' needs. [3]

Get someone to develop mailing labels for the firms since this makes it much easier to handle the multiple mailings you have for the firms.

Coordinate the Practice Visits to Two Firms

This is described in detail in the booklet entitled: *Local Leadership Team Manual*. It is covered there to be sure that all members of the team read it.

Coordinate Volunteer Visitor Training

In states with BR&E programs, the "BR&E Consultant" for your region will help you answer questions and coach you in planning this phase. Their experience can help save you a lot of time and embarrassment. However, you and your team need to do a considerable amount of advance preparation at this stage of the program. It is outlined next.

Prepare Prior to Volunteer Training
The following steps need to be taken by the Leadership Team**, before the Volunteer Visitor training program**:

- Send the Task Force and Volunteer Visitors a reminder letter about the training meeting (see Appendix B).
- Prior to the firm visits, send a letter (Appendix C) and a copy of the survey to the firms.
- Arrange for an experienced BR&E leader to be available (in person or by speakerphone).
- Have the Media Coordinator write several early news releases about the program.
- Match the visitors into teams.
- Prepare individualized packets for each person.
- Make sure there is a VCR/TV and an overhead at the meeting room.
- Work on the agenda and assign tasks as a team (Remember, you are the coach, not the entire team!).

Prepare Individual Volunteer Packets
You must prepare an individual Visitation packet for each volunteer. Be sure to include the following items:

- Surveys (one for each firm being visited plus a few extras).
- Pre-addressed stamped envelopes (enough for one per survey).
- A copy of the letter sent to firms.
- A list of selected firms, complete with the names, addresses and phone numbers of the person to be interviewed.
- A list of the Volunteer Visitor teams.
- Scheduling postcard addressed to the Visitation Coordinator.
- "Guidelines for Volunteer Visitors" instructions.

Rationale for Volunteer Packet Contents
It's handy to have extra surveys in the packets in the event the contact person at the firm has lost his/her copy.

To facilitate the timely return of the surveys, include in the packet a pre-addressed and pre-stamped envelope for each assigned survey.

Volunteer Visitors feel more comfortable visiting firms when they're aware of your previous correspondence with the firms. So—it helps if you include in the packet a sample letter that you've sent to the firm's contact person.

The list of the firms selected should include a complete description of where the firms are located, not just post office box addresses. Also, include the phone number and name of the firm's contact person. This will increase your time preparing for the visits, but it also will improve the response rate by reducing the work of the Volunteer Visitors.

It is very important that firms be contacted soon after they receive the letter. Otherwise, they will forget about it, assume that the project is disorganized, or that the volunteers don't really care about their firm. Because of this, some Visitation Coordinators use a scheduling postcard to track whether or not the volunteers are moving ahead.[4] A sample copy is shown below. If the card is not returned within ten days, the Visitation Coordinator calls to nudge the volunteers or to see if something has come up that requires a reassignment of the visit.

To: Sam Smith, BR&E Visitation Coordinator

Re: BR&E Visitation Visits

Our team has made arrangements to visit the following businesses on the following dates:

Business Names Visitation Dates

1.____

2.____

3.____

We will mail in the survey forms as soon as the interviews are completed.

Team names:_____________________________________

We have found that few Volunteer Visitors drop out of the program after they attend the volunteer training session. Since some of your volunteers will be unable to attend the session (illness, conflict in meetings, etc.), you should recruit about ten percent more volunteers than you need.

If neither volunteer from a team attends the training session, the team rarely completes its assignments, which delays the program. Therefore, they should not be allowed to visit firms. The firms they were scheduled to visit should be reassigned to other volunteers. However, if at least one volunteer attends training, then it's okay for the team to go ahead.

Create Volunteer Teams

As a general rule, the easiest way to pair visitors is to ask the Task Force members to recruit a person to go with them. You might encourage them not to pick a person from their company or organization. It is better if public employees go with private sector business persons and vice versa. It not only builds understanding between the visitors but suggests better collaboration to the firms.

If at all possible, have public officials pick a private sector person and vice versa. This combination gives the firm manager or owner the impression that the program is indeed communitywide, adding credibility to your effort. Also, the private sector volunteer may be more sympathetic to industry opinions or concerns than the public official. Additionally, the public official may have more knowledge of local organizations and state programs that can address the industry's concerns.

Match Firms and Visitation Teams

If you have access to experienced development professionals as part of your Visitation Teams, we suggest that you match them with some of the larger firms, since this is their area of expertise. The rest of the group can be matched during volunteer training. Prepare a list (in large letters) of the names of the firms and post it on the wall. During a ten-minute break after the first hour, ask each Visitation Team to sign up to visit two to four firms. If they have a list of all the firms in their packets, they can scan through it and decide very quickly the firms they would like to visit.[5]

Mail Industry Letters

A few days before the training sessions, mail letters with surveys to all of the firms you have selected. (The state university extension faculty/staff will provide a master copy of these surveys; the Visitation Coordinator must reproduce them locally.) The timing of this step is crucial to the success of your program. Sending these letters and surveys to the industries just before the training sessions allows volunteers to schedule their visits immediately. Having received a letter, the industries will be expecting the volunteers' calls. The longer the delay between the industry letters, the training sessions, and the volunteers' calls, the lower the participation rate of the industries, the lower the volunteers' enthusiasm, and the weaker your program. We cannot emphasize enough the importance of sending your letters with surveys to the industries a few days before the volunteer training. A sample letter asking the industry to participate is provided in Appendix C.

Mail Copies of Survey to Researcher

Ever lost anything in the mail? Or had someone claim that a package never got to them, when it's probably lost in their office? What if this happened with some of your firm surveys and you had not copied them before mailing? What would you tell the firms, the volunteers, and the Task Force? **ALWAYS run a photocopy of the complete survey before mailing it to the researcher**. Besides, your program will need it for the red-flag meetings.

VOLUNTEER VISITOR TRAINING PROGRAM AGENDA

As Visitation Coordinator you are responsible for making sure the Volunteer Visitor training is done well. You help the Leadership Team organize this training. (But remember, you are the quarterback - not the whole team.)

If you are working with a state BR&E program sponsor, the Certified BR&E Consultant will take primary leadership for organizing the training. While you can do this training on your own, we encourage you to seek the assistance of a Certified BR&E Consultant that can help you.[6] Not only do BR&E Consultants have experience in doing the training programs, but more importantly, they can help you answer questions on any aspect of the program.

Importance of Volunteer Training
If you want a successful BR&E Visitation Program, you must have well trained Volunteer Visitors. To demonstrate to firms that your community really cares, you need to have a high completion rate and this requires that the volunteers feel comfortble and confident in their assignments. The training program is aimed at helping the volunteers be well enough prepared so that they have fun on the visits and collect solid information on the firms' concerns.

Even if a BR&E Consultant helps you do the training program, you need to understand what happens. We now discuss the details.

A Typical Training Session Agenda (Total time: roughly 2 hours)

First Hour:
Introducing the BR&E Visitationation Program

Self-introductions by participants	5 min.
Introduce Program	10 min.
Show Videotape on BR&E Visitation	20 min.
Facilitate Small group discussion	5 min.
Facilitate Question and answer period	10 min.
	50 min.
Break for Coffee	10 min.

Second Hour: Preparation for Firm Visits

Distribute visitor packets	5 min.
Review visitor packets	5 min.
Show Videotape on Interview Role Playing	30 min.
Discuss survey methods	10 min.
Discuss deadline for visits	10 min.
	60 min.

First Hour: Introduce the BR&E Visitation Program

The Visitation Coordinator starts the session by briefly describing the objectives of the BR&E Visitation program and the importance of the volunteers to the program. Then key leaders (the Leadership Team, Consultant, and Task Force members) also are introduced. Allow some time for the rest of the attendees to give a brief introduction (name, city, business and/or public office).

If a BR&E Consultant is leading the training, he/she will want you to say why the program is being done, talk about your impressions of the practice visits, and answer any questions about your local goals.

Then show the Sibley County video segment. See the booklet entitled *Using the Video to Introduce the Program and Train Volunteers* for tips on using this effectively. Following the video tape, a question and answer period is held with an experienced coordinator from another program. This discussion is very valuable during the training, as it allows the volunteers an opportunity to ask questions about the program from someone who has already participated in one.

This overview is essential because frequently some of the community leaders will have reservations and questions about the program. Until these concerns can be addressed, Volunteer Visitors will find it difficult to pay attention to the details of their roles.

After the training, some community leaders sometimes comment that they wish the question and answer period with the experienced BR&E Visitation leader had come after Hour Two of the training, when they have additional questions. We discourage you from making this shift for two reasons. First, unless you deal with questions about the general goals and procedures of the program before you go over the survey, you will get those questions then. This bogs down the discussion and the tone turns defensive. This hurts the volunteers' understanding of the survey and results in poorer quality of data and a lower response rate. While you might be able to counter it immediately, often that is not possible without setting off a debate between the two "experts." Second, if the experienced BR&E Visitation leader is on the program in Hour One, this gives you time to counter any "bad" advice before the end of the program.

Second Hour: Prepare for Firm Visits

After the break, distribute the Visitation packets. It pays to spend five minutes going over their contents. Pay special attention to the "Guidelines for Firm Visitors," Appendix B in the booklet *Using the Video to Introduce the Program and Train Volunteers*. It outlines the specific steps and approaches each team is to take. Then have the volunteers view the role-playing section of the video that accompanies this series to demonstrate these guidelines, or develop your own role playing exercises with the questionnaire provided by your state sponsor. As a final item, be sure to stress to the volunteers the procedure for submiting the questionnaires and when they are due.

KEEP VOLUNTEERS MOTIVATED

Get High Attendance at Volunteer Training Sessions

If you get low attendance at the volunteer training, the quality of the program will suffer. There are a number of steps that the Leadership Team can take to ensure high attendance. Some successful techniques used by other communities included:

- Using lots of newspaper coverage of the BR&E Visitation program prior to holding the volunteer training.
- Sending personal letters to the Task Force and Volunteer Visitors.
- Holding at least two training sessions to make it easier for volunteers to attend.
- Scheduling the meetings from 7:00-9:00 a.m. and 4:00-6:00 p.m.
- Implementing a telephone calling tree on the day of the workshop (Leadership Team calls Task Force members, who call volunteers).

Importance of High Completion Rates

Past BR&E Visitation programs that have used this approach enjoyed average completion rates of eighty-five percent. This is very high compared to most survey efforts. For the fifteen percent that did not complete the surveys, about half were due to refusals by the firms and about half were due to volunteers being tardy and disorganized.

There are three reasons why it is very important to have a very high response rate:

1. The public relations benefits of the program is directly related to the completion rate. If many firms are not contacted by volunteers, this is counterproductive.
2. The quality of the data is better as the completion rate improves. There are dangers in assuming that the non-respondents would have answered in the same way (on average) as the respondents. High response rates reduce this problem.
3. Non-completions can be a signal that you will have difficulties keeping your Task Force involved in later stages of the programs.

If there appear to be response problems, the Leadership Team needs to look into the reasons why immediately. They should call their mentor, state sponsor, or BR&E Master Consultant to discuss this.

Encourage High Survey Participation Rates

Here are steps you can follow to get high survey participation rates!

- Let visitors select the firms they want to visit as suggested earlier.
- Use lots of media coverage.
- Keep in contact with Volunteer Visitors on a regular basis.
- Meet weekly during the visitation phase to compare notes and explore ways to correct problems.
- Reassure Volunteer Visitors experiencing difficulty completing visits that they're only expected to do their best.
- Create a "bandwagon" effect by sending out a letter reporting on progress.

APPENDIX A: QUESTIONS FOR BR&E VISITATION RESEARCH REPORT WRITERS

To find a researcher, check first with your BR&E Consulant or state program sponsor. If you do not have these in your state, check with your state department of development, utility companies, or universities to see if anyone is currently doing reports. At the university, the persons most likely to be willing and able to do these will be in the following departments: applied economics, agricultural economics, city and regional planning, public administration, community economic development, or rural sociology.

Regardless of whom you find to do the research, you should ask a series of questions. The quality of reports and the fees vary widely. The following questions will help you evaluate what you would get from each source:

What do we get in the report?

1) What information is included in the report?

2) Are the survey results presented in a strategic planning framework or just summarized?

3) Are suggested action plans presented to the local Task Force? If so, who develops these?

Do You Provide Assistance in Developing A Local Consensus?

4) After the research report is written, does the researcher come to our community to present it?

5) Are the survey results presented to allow Task Force discussion? See *Local Leadership Team Manual?* on pages 10-11.

6) Does the local Task Force make all the final decisions on the priorities for future projects?

Do we get a popular summary and other outputs?

7) Is a summary written by the researcher after our Task Force sets its priorities?

8) Do you provide presentation-quality transparencies of the results ?

9) Do you provide a news release with the final report and summary?

Can you give us references?

10) Can you give us a sample of an earlier BR&E Report or another type of analysis of a local economy that you have written?

11) Are you willing to provide the names and phone numbers of one to two community leaders with whom you have worked?

APPENDIX B: SAMPLE LETTER FOR RECRUITING VOLUNTEERS

(Note: This letter is only sent to individuals who have already been contacted personally by a Task Force member and have agreed to participate.)

volunteer
organization
address
city, state, zip

Dear Volunteer:

Thank you for agreeing to participate in the *(name)* Business Retention and Expansion (BR&E) Program. As a Volunteer Visitor, you are a critical element in this project, sponsored by *(local sponsor)*, the *(state)* University Cooperative Extension Service, and the *(state)* development department. The BR&E Visitation Program has been used in *(number)* counties. It is a nationally recognized program that has been adapted to twenty-five other states.

The overall purpose of the BR&E program is to assist our existing industry. To do this, we have asked local leaders, like yourself, to visit several firms with a survey to gather information about their needs, concerns, and opinions of *(list community)* as a place to do business. This information will help us improve our local business climate to better meet the needs of our existing businesses and future businesses.

To tell you more about the program and your role in it, we are holding two training sessions for all *(number)* volunteers. You need to attend only one of these sessions which lasts two and one-half hours. These sessions are:

(1) (place, date, and time of session 1)
(2) (place, date, and time of session 2)

Please complete the enclosed response card (coordinator, or assistant coordinator, you'll have to design your own response card) and send it to me at your earliest convenience. If you are at all unsure about participating, please attend one of these sessions anyway. After the meeting you can make your decision.

We greatly appreciate your cooperation in this county/community-wide effort. Your participation as a volunteer is critical to the success of the program because we would be unable to implement this program without the help of our local leaders. If you have questions about the program, please call me.

Sincerely,

(name)
BR&E Visitation Coordinator
(agency)

enclosure: BR&E Volunteer Visitors Brochure

B R & E

APPENDIX C: SAMPLE LETTER TO FIRM

Business Retention & Expansion
Serving the Communities of Holland County

(NOTE: This letter is sent to the firms, with a copy of the survey, about 2 - 3 days before the volunteer training.)

February 9, 1996

Dear __________,

The economic well-being of the cities and towns of Holland County depends on the well-being of our existing industries. The Holland County Business Retention and Expansion Partnership believes that manufacturing and retail businesses are a vital part of our economic base. To assist existing businesses and improve the local business climate we are sponsoring a Business Retention and Expansion (BR&E) Visitation program.

The BR&E Visitation program is a joint effort by citizens living in Holland County communities. A number of local organizations have joined in sponsoring the effort.

Economic development groups and city councils throughout the county have been informed of the program and endorse the collaborative effort. The program involves local leaders visiting businesses to identify business concerns and needs. The visits involve surveys to gather the information. Specifically, the objectives of using the survey are to:

1. Understand local business viewpoints on the economy.
2. Understand your business relationship to the local economy.
3. Identify your business concerns related to economic development.
4. Provide local businesses with information about current state development programs.
5. Establish or maintain a channel of communications between your business and local leaders.

Enclosed please find the survey that the volunteers will be using during the interviews. Volunteers will be contacting you within ten days to schedule an appointment to conduct the interview. The interviews usually last about one hour. Let me emphasize that all the information shared during the interviews is strictly **confidential**.

I would greatly appreciate your cooperation with this community effort. Please, if you have any questions regarding this program, call me at your convenience (546-3421) or contact one of the other Leadership Team members listed on this stationery.

Sincerely,

Nancy Norton,
Holland County Extension Agent
BR&E Visitation Coordinator

Enclosure: BR&E Survey

RESEARCH CITED AND END NOTES

[1] BR&E Consultants will find related materials in Chapters 4 and 5 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]Loveridge, Scott, and Thomas R. Smith, 1992, "Factors Related to Success in Business Retention and Expansion Programs," *The Journal of the Community Development Society*, Vol. 23, No. 2, pp. 66-78.

[3]Loveridge and Smith, *op. cit*.

[4]Thanks to Toni Smith, Wabasha County Extension Educator, Minnesota Extension Service, for sharing this idea.

[5]Toni Smith, Wabasha County Extension Educator, Minnesota Extension Service, developed this idea

[6]In most states the assistance of these Certified Consultants is provided at no charge. Often these individuals work for the Cooperative Extension Service, state departments of development, or utility companies. Often there is a charge for the research component of the program—usually this is set so that on average, it is just enough to offset some of the out-of-pocket expenses, such as travel, telephone, and printing. In the interest of your having a satisfying and productive experience, we encourage you to seek out this assistance.

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Business Retention and Expansion Visitation program

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