EC94-805 Existing Business Retention and Expansion Handbook

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Nebraska Cooperative Extension EC 94-805S

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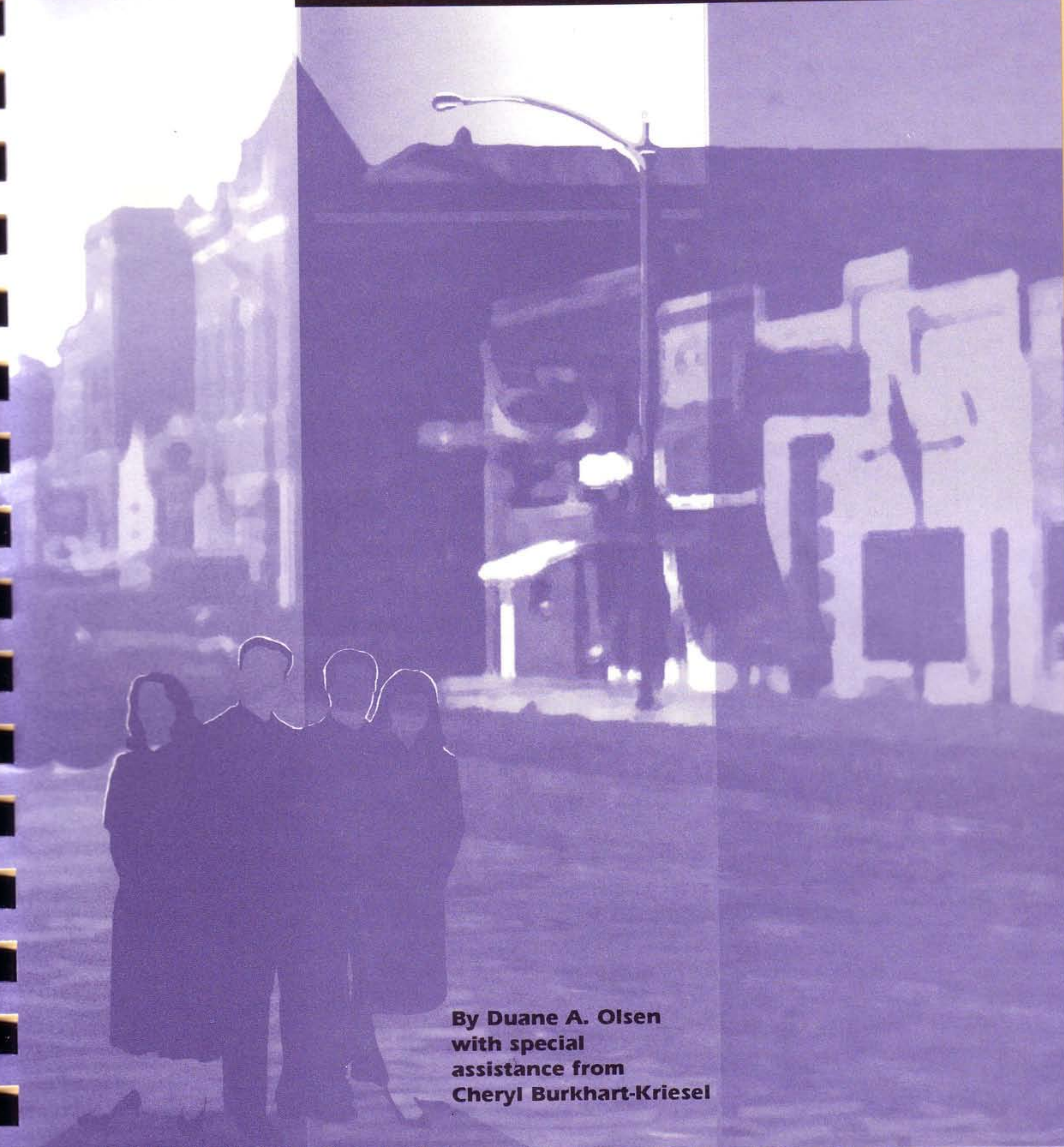

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with special
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PEOPLES NATURAL GAS

Partial funding for printing the Business Retention and Expansion Handbook was provided by Peoples Natural Gas.

INTRODUCTION

Since the mid 1980s more than a dozen communities in Nebraska have carried out the Business Retention and Expansion (BRE) program that is outlined in this handbook. Without exception, both the communities and the businesses involved have reported positive results.

The BRE program is a structured, locally implemented, action oriented economic development project aimed at stimulating local economic development and growth by helping *existing* business. Studies show that existing businesses account for 40 to 70 percent of the net change in employment in a given area. Focusing economic development efforts on these businesses is critical to employment and community growth.

Before a community can help its established businesses, it must have a communication mechanism to pinpoint problems, concerns, and opinions. The BRE program is that mechanism. The program involves local volunteers visiting businesses to gather information about development problems, economic concerns, and opinions about the community as a place to do business. Once aware of these problems and concerns, local leaders can work to improve the local business climate.

For example, if a manufacturer wants to expand its facility but lacks financial backing, local leaders can direct owners to programs that offer financial incentives for expansion. If a business leader has difficulty recruiting adequately trained employees, perhaps local leaders can improve access to programs designed to enhance labor training. Leaders could also act as ombudsmen between the community college and industry with the intention of helping to match the school's training with the industry's needs. These examples illustrate the essence of the BRE program: identifying ways to help existing businesses.

This handbook is designed as a guide for community leaders planning to carry out a Business Retention and Expansion program. Due to variations in local needs and resources, communities are encouraged to customize these tools.

The handbook is divided into three major sections:

I. Business Retention and Expansion Overview
   - Who Is Involved? Roles and Responsibilities
   - The Questionnaire: The Core of the Program

II. Guidelines for Implementing the Program
   - How the Program Works ... From Start to Finish
   - Developing Recommendations and Implementation Plans
   - Making It Public: Preparing And Presenting The Final Report

III. Supplementary Material
   - Program Tools: Examples and Suggestions for Follow-up

Each chapter explains the parts of the program and provides suggestions for adapting the materials to your needs. The examples in Part III are intended to be tools that can be customized to your situation. Where the text discusses the use for one of these tools, you will see a pointing hand (eg.). Use this easy reference mark to check back in the text for guidance as you prepare your program.

The suggestions of Dr. George Morse, University of Minnesota, have been important to the development of Nebraska's BRE program and this publication.

This handbook also relies on ideas found in *Extension Business Retention and Expansion Reference Manual*, a publication supported by the Western Rural Development Center at Corvallis, Oregon. Permission to adapt material from *Success Grows Best At Home* (1988) was obtained from the Economic Development Department, Michigan Bell Telephone.

SECTION I

Business Retention and Expansion Overview

Business Retention and Expansion Overview

Who Is Involved: Roles and Responsibilities

Several leadership roles with defined responsibilities are essential to the success of any Business Retention and Expansion program. These key players include the sponsor, project coordinator, sponsor, task force members, volunteer interviewers and an outside facilitator.

Sponsor

While sponsors may come from any sector of the community, often the chamber of commerce or community business and industrial development organizations fill this role. Their commitment may be a verbal agreement. However, a formal written proclamation, signed by the mayor or another high ranking local official, can help ensure publicity and cooperation.

A sponsoring group has the responsibility to:

- Provide or arrange financing
- Recruit a project coordinator
- Help provide or recruit task force members
- Provide meeting facilities and clerical support

All four responsibilities are important to the success of the program, however financing is a particularly critical item. Program costs are kept to a minimum by relying on volunteers, but it is important to recognize and plan for printing, mailing, training and other costs. In addition, many communities contract with a facilitator from outside the community to tabulate and analyze data, help prepare preliminary recommendations and write the final report. Arranging adequate financial support in advance will ensure that the program progresses on schedule.

Project Coordinator

At the center of the program is the project coordinator who provides local communication, coordination, and encouragement. The coordinator should be widely recognized and respected by business and community leaders. This person also needs administrative and management skills to work with volunteer and community leaders during the project.

The project coordinator is often found among business or community officials who have special economic development responsibilities and/or training. In smaller communities, volunteers with experience in business and community decision making make strong project coordinators.

The BRE project coordinator's responsibilities are to:

- Involve key organization leaders and keep them informed
- Prepare news releases for the local media
- Organize task force meetings (orientation, training, analysis and recommendations)
- Ensure prompt follow-up on business requests for assistance

With the assistance of the task force members, the project coordinator will also need to:

- Develop a work plan
- Recruit and help train volunteer interviewers
- Schedule visits and interviews with local firms
- Collect surveys and guard their confidentiality
- Help identify sources of federal, state, regional, and local assistance
- Organize or present final results at a community meeting
- Facilitate the follow-up of task force recommendations

Usually the project coordinator works two to three days per week on the BRE program during the first month to recruit volunteer interviewers and identify the firms to be visited. From the initial orientation meeting to the presentation of the final report, these projects usually take three to four months. However, the timetable is often adjusted to reflect variations in local needs and expectations. This publication is designed to help the project coordinator organize and manage the BRE project.

Task Force Member

The task force should include people with both local business and community decision making experience. Business leaders are expected to bring firsthand knowledge of management concerns and a strong interest in economic development. The task force should also include elected city and county officials, as well as administrators with a working knowledge of the community decision making procedures.

The task force should be small enough to make efficient decisions and *guard confidentiality*, yet large enough to handle the responsibilities. The major roles of the task force are to:

- Select businesses to be interviewed
- Recruit volunteer interviewers
- Generate recommendations based upon the responses of business owners and managers
- Preview the questionnaire and eliminate the questions that don't fit the community

Task force members often assist the project coordinator with the implementation of the program. Members are often asked to:

- Develop a work plan
- Schedule visits and interviews with local firms
- Design and carry out plans to provide assistance for specific requests, problems or concerns noted during the firm visits
- Help present the final report to the community

The time commitment for task force members depends upon the number of members and the responsibilities delegated to them. A minimum of two meetings before the business interviews is realistic. Following these interviews, task force members should anticipate at least four meetings with one being a public meeting to present the results and recommendations to the community.

Volunteer Interviewers

Volunteer interviewers also should have both business and community decision making experience. They should be able to act impartially when carrying out BRE business. The principal job of the volunteers is to gather information, not to defend existing policies or programs. See the job description in **Program Tools [p. 40]**. Their primary objectives are to:

- Demonstrate a community interest in existing business performance
- Gather information describing strengths and weaknesses of the local business climate
- Describe special requests for assistance, or "red flags," that need prompt attention

After the business interview is over, volunteers are encouraged to describe suggestions for follow-up on the form found in the **Program Tools [p. 35]**. This allows volunteers to highlight the basic concerns or suggestions of the business interviewed, as well as describe red flags and the present need for prompt action. These suggestions will be returned with the completed questionnaire to the project coordinator in a sealed envelope.

The volunteers should be required to attend a training session before the business interviews. This session gives the volunteers an opportunity to review the interview questions, ask any questions about the program, and obtain background information on the businesses to be interviewed. Procedures used to ensure confidentiality of the information gathered must be stressed at this time.

Volunteers should work in teams of two while conducting the interviews. One person keeps the discussion on track while the other records the information. Because volunteers have many competing demands for their time, only three or four business interviews for each team are recommended. Volunteers need to allow one hour for the actual interview, plus extra time to make arrangements and rewrite notes following the interview.

Outside Facilitator

Up to this point the guidelines for assembling a team of volunteers has emphasized local ownership and a do-it-yourself approach. However, each community has different resources available and different challenges to address. As a result, some communities may decide to hire a facilitator from outside the community. An outside facilitator can assist in training, analysis, and other key project tasks. These "outsiders" also can help task force members ensure the confidentiality of data analysis procedures.

People with special training or experience with the Business Retention and Expansion programs of other communities are recommended. They are often asked to:

- Train the volunteer interviewers
- Compile and analyze data
- Prepare preliminary findings
- Identify reviewers from outside the community

In addition, an outside facilitator may be expected to:

- Propose solutions to problems mentioned during the business visits
- Identify external sources of assistance i.e., federal, state, regional, and local assistance
- Counsel with individual firms on identified problems or issues

The facilitator should have a thorough knowledge of the BRE program experiences along with a strong economic development background. They can be found in both the public and private sector. Nebraska Cooperative Extension Educators as well as people associated with the Department of Economic Development and public power districts have helped facilitate BRE projects.

The Questionnaire: The Core of the Program

The example questionnaire was designed to organize interviews and make them interesting and valuable to both the business leaders and volunteer interviewers. The questionnaire is expected to help business leaders identify and describe opportunities that could strengthen their competitiveness and the overall climate for business.

Business Retention and Expansion programs build and/or refine communication networks between business and community decision makers. Information gathering is the primary objective of the face-to-face interviews. The success of the questionnaire depends on the businessperson's willingness to disclose information. Therefore, the concerns, suggestions, and requests the business leaders present must be treated *confidentially*. The trust and confidence established and nurtured during these visits is essential to the community's long-term economic development efforts.

If the interviews are going to be beneficial, it is important that the volunteers understand each question and why it's being asked. The following explanation can be photocopied and distributed, along with a sample survey, at the training meeting. Everyone should have a good understanding of the survey before they begin the interviews.

Overview

The basic questionnaire, found in the **Program Tools [p. 28-34]**, was tested and refined in previous Nebraska projects. These questions direct the attention of owners and managers to the strengths and weaknesses in the local business climate. Their concerns and suggestions will be used to prepare recommendations important to business competitiveness and local economic development goals.

The questionnaire has six sections:

Section I.	Economic History and Contributions
Section II.	Business Environment
Section III.	Work Force and Labor Market Concerns
Section IV.	Business Plans
Section V.	Business Assistance Needs
Section VI.	Questions of Special Concern

There are 42 questions in sections I - IV, including some that call for multiple responses. Although these questions have been carefully selected and tested, task force members are invited to eliminate any questions that do not fit their community or the businesses to be visited.

Section VI, "Questions of Special Concern," are questions proposed by local task force members. These questions are expected to examine concerns unique to the community or probe selected issues in greater depth.

This questionnaire was developed for use with personal business visits by volunteer interview teams. These questions can be answered in less than one hour, but they often produce discussions that extend the interview period. The following suggestions are offered to reduce the time usually required.

1. Mail the questionnaire to the business leaders and invite them to:
   - Review the questionnaire
   - Answer questions that call for a number, a ranking or a yes/no response

   This allows them time to think about their response before the interview, leaving more time to explore their concerns and suggestions during the interview.

2. Train all volunteer interview teams to:
   - Describe the questionnaire, its objectives and the expected results
   - Identify assignments
   - Arrange appointments
3. Review the suggested interview procedures:
   - Use a friendly but businesslike approach
   - Read questions just as they are written
   - Take time for corrections, questions or explanations

Why We Ask These Questions

"Why We Ask These Questions," describes each section of the questionnaire and the potential implications of the business leaders' responses. Understanding the purpose of each question will help interviewers interpret the answers. The following is a description and the potential implications of the responses from business leaders.

Economic History and Contributions [pp. 28-29, qq. 1-10]

This section of the questionnaire sets the stage for discovering insights about the growth potential of the business community. Businesses selling similar goods and services are expected to have common concerns and suggestions for improvement. The old and new business mix may lead community leaders to consider business incubator ideas that encourage new entrepreneurship. In addition, special recognition of a business leader's longevity and community contributions might enhance their continuing support and participation.

Descriptions of the markets served, sales, and employment generate a better understanding of these businesses and their community impact. Identifying the markets they serve reveals the interdependence of area, regional and national economies, and points to the importance of transportation systems. These questions direct attention to linkages affecting business decisions as well as the community's vulnerability to changes in population, consumer tastes and preferences, and technology.

Local or area businesses are expected to reflect trends toward consolidation, concentration, and interdependence. Information-age technology has influenced production, marketing, and management along with consumer behavior. Identifying organizational linkages and their impact upon business decisions will help assess their long-term impact on independent entrepreneurs and the community's economic development strategies.

Business Environment [pp. 29-31, qq. 11-22]

A business leader's assessment of the overall business climate in the community indicates their level of satisfaction with specific economic strengths and weaknesses.

Satisfaction with important services confirm the community's business climate strengths. Dissatisfaction with selected services and suggestions for improvements could reveal what short-term adjustments can be made and avenues through which long-term weaknesses could be addressed.

Questions about the building and associated grounds will indicate whether there is sufficient land and space available for the existing operation and for future expansion. Location issues are also targeted by questions about parking, highway access and the transportation systems businesses rely upon. The answers may reveal a need to examine and perhaps fine-tune community plans to address land and transportation barriers to business growth.

Answers received to questions about sources of funding and credit are used to assess the general health of the business community. Community leaders can use this information to identify credit problems, build awareness of alternative sources of funding and of the opportunities for business counseling services.

Work Force and Labor Market Concerns [pp. 31-32, qq. 23-30]

Current labor market characteristics and long-term labor trends are examined in this section. Business leaders describe current employees, benefit packages, and turnover along with their retention and recruitment problems. Subsequent recommendations by the volunteers are expected to identify information gaps, as well as services and community characteristics that are important to work force recruitment and retention.

The productivity of workers has historically been challenged, defended, and advertised because of its importance to business performance and economic development. Productivity is important to employees and communities, as well as employers. Public and private institutions affect labor productivity through education, training, and health care services. This group of questions directs attention to opportunities for communication networks and related programs that can be introduced or fine-tuned to maintain a strong business climate.

Business Plans [p. 33, qq. 31-38]

Plans for expansion indicate whether these business leaders think their business has the potential to grow in the community. Task force recommendations may be designed to make sure that existing business leaders are aware of available training, space, and financial incentives.

During the discussion business leaders may divulge invitations they have received to move to another community or state. These offers confirm the competitiveness of economic development and allow local leaders to learn who their competition is. A more focused and critical study of community policies and programs can follow. Recognizing the incentives offered may also improve business retention and expansion.

Any requests for business assistance should be considered red flags and given top priority to be promptly addressed. Special attention should be given to business closures. Other symptoms of business stress also should be red flagged to ensure that avenues of assistance are identified and pursued. Personal, confidential consultations are a good way to identify and improve access to essential expertise and resources. The "Follow-up Suggestions and Red Flags" form in the **Program Tools** [p. 36] can help organize the concerns.

Recognition of goods and services purchased outside the market area will help reveal avenues of economic leakage. Any opportunities for business substitution that are discovered may be helpful to local entrepreneurs who are searching for profitable business alternatives. These substitution opportunities often address both business and household needs.

During this time, business leaders have an opportunity to summarize their views, expand their earlier responses, and provide insights that might otherwise be missed. They often use their responses to clarify problems cited earlier and complete their descriptions of improvement.

Business Assistance Need [p. 34, qq. 39-44]

Specific educational topics will be suggested by the business leaders, and volunteers can recommend already scheduled seminars or workshops for employees and employers. Often, however, seminars will need to be specially organized and marketed to meet the specific needs.

Business leaders will often ask for assistance in updating their business plans. Others just want to discuss them with development officials. Recommendations should reflect their specific requests and identify alternative sources of assistance.

The sources of assistance already used by business leaders will help identify alternatives for other owners and managers. Their suggestions may direct attention to awareness as well as improved working relations.

The perceptions of relations a business leader has with local government indicate the community's capacity for economic development. Business leaders will usually need to provide a narrative response to the questions in order to reveal how effective they believe existing economic development policies and programs are, and how they can be improved. Interviewers should encourage them to provide more detailed answers.

Questions of Special Concern [p. 35]

This section of the questionnaire is optional, however, most local task forces include questions that ask business leaders about special concerns or proposals. Questions about housing, transportation, and proposed community facilities or services are often included in this section.

These questions should be designed to produce responses that provide an accurate, complete view of the issues or concerns addressed. Task force members should carefully review these questions with people experienced in survey research and use practice interviews to test the proposed questions.

There is no limit to the number of special questions that can be included, however, it is important to realize that as the number of questions in a survey increases, the number of people who refuse to participate also tends to rise.

Guidelines for Implementing the Program

How the Program Works ... From Start to Finish

Once the volunteer team is assembled and everyone understands the parts of the questionnaire and the information it will provide, it is time to get started.

The steps involved in planning and implementing a Business Retention and Expansion program are discussed in this section.

Plan the Program

Creating a concise beginning-to-end plan is critical to the program. Generally, the project coordinator or a member of the task force is assigned the responsibility of identifying and listing the important events of the program. The person with this responsibility should develop a timetable with the other task force members. Generally, three to four months should be allowed to organize, recruit volunteers, gather and analyze information and write a final report that describes the project's results and recommendations. The BRE program can be carried out any time of the year so that it doesn't compete with seasonal demands of the community.

A checklist, found among **Program Tools [pp. 37-38]**, describes the program process and will help organize the work. It includes the basic tasks found in a successful program. Additional responsibilities can be added to customize the plan to each community.

The final report presents the survey results and the task force recommendations at a community meeting. However, meeting is not an end, but a beginning of the efforts to address Business Retention and Expansion recommendations. Implementation efforts need to be monitored and refined. Survey results and task force recommendations need to be updated every few years to maintain and revise the community's existing business retention and expansion efforts.

Critical Steps

The following steps describe the activities important to the success of Business Expansion and Retention programs.

Step 1 - Gather Community Commitment

Community support and approval are essential. A sponsoring organization must be able to offer financing and provide the administrative services and leadership needed to win additional support from key community leaders and organizations.

Step 2 - Establish a Budget

The project coordinator works with task force members to determine the administrative costs of the program and prepares a budget for the sponsoring agency. Items to be considered include:

- Printing — letters, invitations, questionnaires, training materials, and the final report
- Postage — press releases, letters, and questionnaires
- Training — room rental, materials, and refreshments
- Survey tabulation — it may be necessary to hire a professional if volunteer services are not available
- Visual materials for the final presentation — slides or overheads
- Final presentation — refreshments, room rental, equipment rental, etc.
- Staff services for organizing and keeping records of the program activities — necessary if volunteer services are not available
- Services of an outside facilitator, if needed

Step 3 - Announce the Program

The community's support of BRE begins as soon as the public announcement is made. The more important and credible it sounds, the better the participation will be. A formal proclamation issued by local government officials (such as the mayor) that endorses the program's purposes and commends its supporters will build public interest and support. This proclamation should be coordinated with key government officials well before the program's official beginning. It can act as the first press release. An example of a typical proclamation reads:

RESOLUTION

Whereas, the Anytown, Nebraska City Council recognizes the importance of local businesses to the economic growth of our community and state, and

Whereas, Anytown, Nebraska enjoys the benefits of having a variety of industries located within this community, and

Whereas, a good line of communication should be established and maintained among the industrial, business, and governmental units of this community, and

Whereas, the business and civic leaders of this community are willing to use their time and talents for conducting a survey of our community to establish communication lines, and

Whereas, the information derived from this survey will benefit our entire community by discovering areas of mutual concern and facilitating long-range planning.

Now Therefore Be It Resolved, that the Anytown, Nebraska City Council does hereby sponsor the Business Retention and Expansion Program survey in cooperation with the Anytown Business Alliance and does designate Ms. Julie M. Smith as the project coordinator for the program.

Step 4 - Issue Initial Press Release

Media exposure is important to the success of a BRE program since it is the best way to alert business leaders to the program. The project coordinator and task force members need to identify all print and broadcast media outlets, and then phone the media contacts to explain the program and let them know how frequently they can expect releases. Emphasize that any coverage they provide will be appreciated.

An initial press release can be coordinated with the proclamation or before the volunteer training. It should include the following information:

- The program's official title and the names of the sponsors and project coordinator
- A brief explanation of the program and its benefits to the community
- The community's commitment to the program, including a mention of any official proclamation
- The date the program officially begins and is scheduled to be completed
- A description of the role of the task force and volunteer interviewers
- Quotes from the project coordinator, representatives of the sponsoring agency or government officials, if available
- Assurances of confidential treatment of interview data

An example of an initial press release can be found in the **Program Tools [p. 47]**.

Step 5 - Confirm Data Processing Assistance

The project coordinator should find people who will compile and analyze the data early in the process and work with them to coordinate the processing procedures with the methods the interviewers will use to record business leaders' answers. The data processors will need a good understanding of the survey content to conduct their analysis and present the results.

The data processing can be conducted locally, however, to further ensure the confidentiality of the survey data, outside data processing services are widely used. Facilitators with the Nebraska Cooperative Extension, and other organizations which support economic and business development may be contacted to provide these services.

Step 6 - Identify Target Businesses

At this point, the project coordinator and task force members will develop a list of businesses to be interviewed. The selection should be based on the community's economic development goals and objectives. While the type of businesses selected vary from one community to another, three factors or characteristics should be considered:

- Economic impact — Businesses that sell goods or services in markets outside the community and bring new income to the community should be emphasized.
- Sufficient numbers — The number of business leaders to be interviewed should be sufficient to ensure reliable results.
- Businesses with similar needs and concerns — Owners and managers with similar production, management, and marketing problems are most likely to provide complete, accurate descriptions of their concerns and suggestions.

Businesses may be identified through: membership records of the chamber of commerce and other business organizations, business directories, community tax rolls, zoning records, and the *Nebraska Directory of Manufacturers* (published by the Department of Economic Development). State and national trade or industry associations with sufficient detailed membership lists can prove helpful as well.

Step 7 - Review Questionnaire

The project coordinator should review the basic questionnaire with the task force to examine each question for relevance. Those that are not appropriate to the community or to the characteristics of the targeted businesses should be deleted. Such changes will not affect the validity of the survey and will make the entire process more efficient.

This is the time to add questions of specific local interest. These questions should be composed by task force members, reviewed with the facilitator, and tested to maximize the clarity and authenticity of the expected responses. Two or three practice interviews with targeted businesses are recommended to test these questions and uncover interview problems.

Step 8 - Recruit Volunteer Interviewers

The project coordinator and task force members must recruit, and support volunteer interviewers. The information the volunteers gather during the visits with business leaders provide information upon which task force recommendations depend.

The interviews are designed to discover ways to strengthen the climate for business. Volunteer interviewers often have access to resources, contacts, and leverage that can address concerns uncovered during the visits. However, they are expected to listen objectively to replies that may criticize current policies and programs, NOT to defend them.

Volunteer Interview Teams

Two-member interview teams are recommended. One member will ask the questions and keep the interview on track while the other person records the responses. Interviewers should represent a cross section of professions and organizations. Bankers, educators, Extension educators, clergy, hospital administrators, business owners, retirees, engineers, editors and publishers, plant managers, and local government officials have served as volunteer interviewers.

Teams with both a public official and a private business representative reinforce the impression that the program is a community-wide effort. Furthermore, business leaders may be more sensitive to the opinions or concerns of owners or managers while a public official may bring to the interview a special knowledge of community resources and other public business assistance programs.

The number of volunteers needed depends upon the number of businesses targeted and the time each interview requires. Ideally, each team should be assigned two businesses or industries, but four business visits per team is reasonable. The basic questionnaire is designed for interviews of less than an hour, however, the questions often generate discussions that increase the time required.

A few volunteer interviewers will drop out of the program after they attend the volunteer training session (discussed later in this section). Since some volunteers will be unable to attend the session or complete their assigned interviews, recruit a few extra interviewers to help finish them.

Why Do People Volunteer?

Some people volunteer because economic development is one of their job responsibilities. Others participate because they care about the community and its economic development. Many want to learn more about local business and economic development, want to meet new people and develop more personal and professional relationships, and they want to become more active in their community.

There are three key things to remember when recruiting volunteers:

1. Personal contact from a task force member greatly improves positive response from potential volunteers. Task force members usually phone or personally visit prospective team members. That contact should be followed by a letter to further explain program objectives, the volunteer's job, and the date, time, and location of the volunteer training session. A sample letter is provided in the **Program Tools [p. 51].**
2. Return to the organizations endorsing the BRE program and ask for volunteers. These organizations will likely provide several volunteers as part of their support.

3. Try to obtain media coverage about the program before beginning volunteer recruitment. People who have already read or heard about the program are more likely to be interested in volunteering when contacted.

Training Interviewers

Two identical training sessions are recommended to ensure the participation of all volunteers. Typically held on the same day, they allow volunteers to select the time that best fits their schedule, and smaller groups tend to have more questions and discussion. Training sessions held in late afternoon typically fit into everyone's schedule.

Volunteers who do not attend the training session rarely complete their assignments. These volunteers should not be assigned business visits.

Step 9 - Coordinate Volunteer Interview Team Assignments

The project coordinator should make the initial interview team assignments. Ideally, each interview team will have no more than four businesses to visit. During the volunteer interview training meeting, these assignments can be adjusted to strengthen working relationships and improve the information gathering process. A sample assignment sheet can be found in the **Program Tools [p. 41].**

Step 10 - Create Master Coordinating System

A critical part of the project coordinator's job is keeping track of the volunteer assignments and their progress. A master coordinating list can help facilitate this process. An example of the form is shown below.

Efficiency and control are greatly increased if this information can be maintained by computer, either in a word processing text file or database management file. It is possible to easily update mailing lists and produce letters to businesses who agree to participate with such computer files.

Step 11 - Send Introductory Letter to Business Leaders

The project coordinator and task force members should work together to prepare a letter inviting local businesses to participate in the survey. This letter should be mailed the week before the volunteer interviewers training sessions. A sample introductory letter is provided in the **Program Tools [p. 52].**

Step 12 - Train Volunteer Interviewers

Train the volunteers to make sure they are familiar with the purposes of the program and their responsibilities. A well-organized training session should be completed in less than two hours.

A packet of resource materials should be prepared for each interview team. Copies of the following resources can be made from the Program Tools.

- Questions and follow-up suggestion sheets sufficient for their interviews
- A flow chart of "Essential Program Elements"
- A job description
- An interview assignment sheet
- A visitation schedule
- Copies of letters sent to business leaders advising them of the survey.

The project coordinator also is encouraged to prepare a schedule of events and background material and descriptions of the targeted businesses.

MASTER COORDINATING LIST					
Company Name	Interviewer Name(s)	Interview Date	Letter/ Survey Mailed	Date Survey Received in Office	Red Flags
1.					
2.					

During the training session, the project coordinator can review all of the support material and discuss the following aspects of the interview process:

- Setting up the interview — Personal contact to arrange interview appointments should be made shortly after the training session. Telephone contact following the introductory letter is a good way to answer questions and arrange an appointment.

- Confidentiality — The classified nature of the interview and the measures taken to safeguard the trust and confidence of business owners and managers throughout the project *should be underscored.*
- Conducting the interview — Stress the importance of completing all questions, adequately recording explanations for all narrative responses, and writing as legibly as possible.
- What to do if . . . — Volunteers need the confidence to handle unexpected questions or challenges. Preliminary practice interviews can help uncover problems and solutions.

Discussion of example situations, such as a refusal to participate or a business that is moving, should be part of the training. Volunteers should identify reasons behind the refusal and try to complete the interview. At these turning points, the business leader's perception of strengths and weaknesses in the business climate may be particularly clear. They may be more willing to discuss frankly the real reasons for moving.

Step 13 - Issue Second Press Release

Immediately after the training session, the project coordinator should prepare and distribute a second press release. This announcement should reemphasize the importance of community commitment and highlight the interview training. If possible, it should include a group photograph of the volunteer interviewers. A sample press release can be found in the **Program Tools [p. 48].**

Step 14 - Arrange Interview Appointments/ Follow-ups

Once the training session is completed, the volunteers should call the businesses assigned to them. They should keep records on the responses to their calls, and report scheduled interviews and/or problems to the project coordinator.

If a business leader declines to be interviewed, the project coordinator should personally make a second appeal with a telephone call or follow-up letter.

Step 15 - Mail Questionnaires

Once an interview is scheduled, the project coordinator must arrange to mail the questionnaire to the business leader. The cover letter should encourage business leaders to review the questionnaire before the interview. The cover letter also should confirm the interview time and date. A sample confirmation letter is found in the **Program Tools [p. 53].**

During the interview, volunteer interviewers will review each question and record all responses. However, most of the time will be focused on identifying and describing concerns and suggestions for improvements important to business.

Step 16 - Organize and Conduct Interviews

Once the volunteers have attended a training session, they need to organize their business visitations. They should:

1. Meet with partners and discuss convenient dates and times for visits to businesses. (Names, addresses, and phone numbers for all volunteer interview team members should be available in the training packet.)

2. Contact the assigned businesses within one week. Volunteers should call to schedule an interview right after their training. Before that training, each business owner or manager received an introductory letter *so this call is expected*. (The name, address, phone number, and contact person for each business should be in the training packet.) The refusal rate goes up as the time between the letter asking for participation is sent and the volunteer's call to schedule an appointment increases.

3. Prepare for each visit. Knowing a few facts about these businesses will make volunteers more comfortable when conducting the interview. It also shows the business leaders that the community (via the volunteers) cares about their business and its well-being. *The U.S. Industrial Outlook* published annually by the U.S. Department of Commerce provides business forecasts for 350 industries. *Business in Nebraska* is available from the Bureau of Business Research, University of Nebraska-Lincoln. A telephone call to confirm the appointment

the day before the interview is *strongly recommended*. This is not only a courteous gesture, but also a gentle reminder of the appointment.

4. Conduct the interviews within two weeks. The presence of both volunteer interviewers is important to prove that the community is committed to business growth and to conduct efficient and effective interviews. If one interviewer can't be there at the last minute, the interview should be rescheduled.

5. Return completed surveys to the project coordinator.

At the beginning of the interview volunteers should:

1. Introduce themselves.
2. Briefly explain BRE program objectives and the survey.
3. Provide a copy of the survey if the business leader does not have one.
4. Explain the data coding and aggregating procedures that will be used to make detection of individual answers virtually impossible.
5. Remind the business leaders that they do not have to answer any questions they find objectionable.
6. Never promise specific assistance — the BRE task force will review requests and respond when resources are available. In those cases, permission for added follow-up may be requested.

When the interview begins, one volunteer reads questions directly from the survey while the other records the responses. Paraphrasing questions may change the meaning and often produces inconsistent replies. However, volunteers should feel free to probe or to ask related questions to obtain more information.

At the end of the interview, thank the business leader and explain that the results will be announced at a community event in a few months. Following the interview the volunteers should find a place away from the business to review the surveys to ensure that all answers are complete, understandable, and legible.

They are also encouraged to describe special concerns, business requests, and the need for prompt follow-up. These follow-up suggestions give volunteers an opportunity to record their impressions while they are still fresh. These suggestions should draw the project coordinator's attention to items that need immediate attention. A "Follow-Up Suggestions" form can be found in the **Program Tools [p. 36]**.

The completed survey and the attached "Follow-Up Suggestions" form should be promptly returned to the project coordinator. The coordinator removes the cover sheets and sends the surveys to the person(s) working on the data processing.

The interview process is the key element in a successful BRE program. The project coordinator can assist this process by:

- Scheduling a "Business Visitation Week" and announcing it through news releases and correspondence with business leaders.
- Establishing a cutoff deadline for the completion of all business visits with volunteer interviewers during the training meeting.
- Asking each volunteer interview team to report the dates of the appointments and the completed interviews to the project coordinator. When interviews are delayed beyond the agreed deadline, ask task force members to help reassign the business to another interview team.
- Writing letters to the businesses to express the community's appreciation for the their participation.

Step 17 - Review Returned Questionnaires

As surveys are returned, the project coordinator should check the surveys and question interviewers about the replies that are not clear or legible. The identifying cover sheet will be removed and a code number assigned. The code number should appear on each page of the questionnaire.

The project coordinator also should review the follow-up suggestions and requests for special assistance. Even if the business leader asked for special assistance, permission to refer the problem to the appropriate agency should be obtained from the business leader first.

Step 18 - Compile the Data

The coded questionnaires should be promptly and securely sent to the people who will process the data. After the data are entered, the original survey forms are returned to the local project coordinator.

Step 19 - Develop Recommendations

After the data are coded and compiled, the preliminary results are presented to the task force members. They will first analyze "business" and "community" results to identify and describe the recommendations important to business competitiveness and to strengthening the community's business climate. (The next section of this handbook discusses the development of these recommendations and the design of the final report.)

Step 20 - Issue Third Press Release

While the final report is being completed, the third press release can be sent to the media. This release announces the completion of the survey and the plans for a public presentation of the results. It should be submitted about two weeks before the community meeting. An example of a third press release appears in the **Program Tools [p. 49]**.

Step 21 - Present Findings to the Public

The program coordinator and task force members should organize and present the findings and recommendations at a community meeting. Formal invitations should be sent to everyone who was involved with the project and to the people who could help carry out the recommendations. (More information concerning the invitation list and the steps to be taken in planning such a presentation is provided.)

Step 22 - Issue Final Press Release

The final press release should summarize the public presentation and note important findings. Plans to carry out task force recommendations could be included in the release. If possible, arrange for a photographer from the paper to take pictures at the event. A sample release is provided in the **Program Tools [p. 50]**.

Step 23 - Organizing Follow-up

Completing the survey is really only the beginning of the program. Success ultimately depends on the implementation of the recommendations discovered from the concerns and suggestions given by the business leaders. The project coordinator and task force members need to monitor progress, search for added resources, and propose adjustments.

Many task forces find that targeted, ongoing business visits are essential to existing business retention and expansion strategy. These efforts include:

- Targeting new businesses and those in key economic sectors.
- Organizing business visitation teams to make a specified number of visits each month.
- Developing visitation teams which include prominent local leaders from government, development organizations, and other business leaders.
- Encouraging team members to learn about the business, asking about concerns and suggestions, and describing related policies and programs during the visit.
- Developing a short version of the BRE questionnaire to be used as a discussion guide during these business visits.

Periodically, every two or three years, a more comprehensive BRE project may be needed to supplement these annual visits in order to explore in greater depth changes in the factors that influence business competitiveness.

Developing Recommendations and Implementation Plans

Competitive businesses are essential to long term economic growth and development of every community. During the personal interviews, existing owners and managers assess factors affecting business performance. Task force members use the responses to develop recommendations and design implementation plans important to both business competitiveness and community development.

Information Sources

Once all of the business visits are complete, the task force members need to review the surveys they've collected and make recommendations. They should point out signs of business stress and requests for help, and they should identify potential problems. To make these determinations, they may rely upon three sources of information.

1. Information from Retention and Expansion Surveys

The survey responses of owners and managers describe the challenges and opportunities important to existing businesses. These responses are the primary source of information that task force members will use to develop recommendations to improve the business climate.

Business leaders will provide some clear, well defined descriptions of needs or suggestions for improvement. However, further analysis is required to discover other clues or symptoms important to business competitiveness. A two-way analysis of survey responses is proposed.

- The first analysis focuses upon the responses of each business leader. The purpose of this "business analysis" is the identification of special requests and early warning symptoms.
- The second phase explores general responses of all owners and managers. This "community analysis" uncovers widely shared views about strengths and challenges, i.e. opportunities for improvement in the local climate for business.

2. Information from Experience

Task force members bring an insiders knowledge to the examination of the survey responses. Their knowledge of economic and demographic characteristics, community resources, values, and experiences will help them form recommendations and design implementation plans that are acceptable to the community as a whole.

3. Information from Other Communities

Selected community and economic developers from outside the community also should be invited to appraise the survey results and review the task force recommendations. They are expected to identify other alternatives and/or alternative resources that will help implement task force recommendations.

Recommendation Categories

There are three general economic development strategies that can be derived from the information sources.

1. *Red flag recommendations* are concerns and opportunities associated with the competitiveness of specific businesses. These recommendations should reflect individual requests, special business needs and early warning signs of business stress.

2. *Fine-tuning recommendations* deal with similar concerns or suggestions presented by several business leaders. They are associated with improvements or opportunities that can be addressed by existing programs or resources. Modest changes in resource allocations, extra support from development groups, or other cooperation and collaboration opportunities are expected to fine-tune the overall business climate of the community.

3. *Long-term economic development strategies* should be periodically reviewed, refined or adjusted. The analysis of survey results will uncover concerns or suggestions that cannot be addressed with existing programs or resources. This should not be discouraging. Economic development is a long-term job that requires time and opportunities.

Developing Red Flag Recommendations

The business analysis of coded survey results (from which the names have been removed) will lead to the discovery of individual requests for assistance. A preliminary analysis of data should reveal:

- Special requests for assistance in business planning
- Location or spatial problems associated with expansion plans
- Plans to close, retire, move or relocate
- Early warning signs or symptoms of business stress

Supplementary information may also be found on the follow-up suggestion sheets completed by volunteer interviewers. **[Program Tools, p. 36]**

Before offering assistance, task force members must *make sure they have an invitation from these business owners or managers.* These follow-up plans usually begin with prompt, private, personal consultations. Subsequent efforts are made to ensure that business leaders have access to the appropriate sources of assistance.

Fine-tuning Recommendations

The community analysis uncovers concerns and suggestions that were shared by several business leaders. Related recommendations are expected to highlight ways to fine-tune existing programs or community resources important to business. While these usually focus on business climate weaknesses or improvements, opportunities to build on local strengths should also be given attention.

Five topics commonly addressed by task force recommendations are:

- Business competitiveness — Special management training on education topics, expansion barriers, improvements in business services, input substitutions, and entrepreneurship opportunities
- Labor market — Employee training and productivity, recruitment and retention, work force and human resource development
- Business and community services — Levels of satisfaction and improvements in air transportation, parcel carriers, telecommunication services, housing, and other services important to business performance
- Public services and facilities — Improvements in parking; recreation facilities and services; zoning, permit and inspection processes
- Economic development leadership — Recognition, rewards, and training to strengthen support, build knowledge, and build collaboration with economic development leaders

Implementation plans generally involve responsible officials who search for adjustments in existing programs or resources. Teams of people with special expertise, resources or interests may be organized to provide support, share information, and offer assistance. Proposed objectives should be feasible, practical and measurable activities that can be accomplished in a reasonable time or in one budgeting period.

Long-term Strategies

Research has shown that continuity is a key to economic development. Each community needs long-term goals and strategies that address all dimensions of economic development.

While many factors important to business performance seem to be outside local control, given time and opportunities community leaders can raise additional resources, collaborate with neighboring communities and improve their capacity to cope with changing technological, economic and political factors. The strengths and challenges these business leaders identify should be used to expand or refine the community's long-term economic development strategies.

Long-term implementation plans often call for further research and education. Multi-community collaboration or partnerships, and special networking opportunities are common of the plans used to implement these recommendations.

Suggested Format for Developing Recommendations

The following steps will help task force members use their time and talent efficiently and effectively. However, schedules that leave time for deliberation and discussion between meetings will improve recommendations and implementation plans.

Step 1. Surveys and follow-up suggestions submitted by each volunteer interview team should be promptly reviewed by the local coordinator to identify special requests for assistance. Survey results should be coded and compiled by an outside facilitator to ensure confidentiality.

Meeting # 1

Step 2. Divide task force members into small groups to review the coded survey responses. Give each group surveys of

businesses that sell similar goods and services (see survey question number two). Ask them to identify requests for special assistance and symptoms or early warning indicators, and design recommendations that address them.

Step 3. Invite all task force members to combine and refine these descriptions. Task force members may want to use the "Business Analysis Worksheet" found in the **Program Tools [p. 43]** to help prioritize these recommendations

Before meeting #2

Step 4. Prepare tables presenting totals, averages, and ranges describing responses to each survey question. Combine and group similar concerns and suggestions.

Step 5. Invite outsider facilitators to review these survey results. Their knowledge of other communities and awareness of financial and technical resources should be of value in developing recommendations and implementation plans.

Meeting # 2

Step 6. Present statistical data and other survey results to all task force members. Assign one of the six questionnaire sections to a task force subcommittee. Ask the committee to write preliminary recommendations based upon the concerns and suggested improvements they discover.

Step 7. Task force members should design implementation plans that address both fine-tuning recommendations and long-term strategies. A "Community Analysis Worksheet," found in the **Program Tools [p. 44]**, helps identify factors important to their implementation plans.

Before meeting #3

Step 8. A task force member or an outside facilitator with special writing/editing skills should write a report highlighting survey results and describing task force recommendations.

Step 9. Give task force members and outside facilitators an opportunity to review the draft report and make suggestions.

Meeting # 3

Step 10. Plan a community meeting(s) to present task force findings and recommendations. Following the meeting, prepare and publish sufficient copies of this report, along with an executive report, for wide public distribution.

Moving From Recommendations Into Implementation

This program assumes existing business leaders play a key role in the creation of community jobs and investment opportunities. Their recommendations and subsequent implementation plans provide a plan of work for the community's economic development efforts.

Common objectives found in implementation plans designed by other task forces are described below. They should be seen as a starting point or ideas to be adjusted to fit unique local conditions.

Immediate Red Flags

Before action is taken on red flag recommendations, the business leader's interest in special assistance must be confirmed. Subsequent actions usually involve personal contact by an appropriate business or community leader(s). These visits are designed to:

- Improve relations and demonstrate interest
- Build awareness of financial and technical assistance
- Recognize and facilitate collaboration
- Offer support, provide staff assistance, and other business incubator ideas
- Build or improve communication linkages between business and community officials

Direct requests for special assistance to outside agencies or organizations. Local leaders can help initiate, facilitate and monitor these efforts to make sure the requested business assistance is provided satisfactorily.

Short-term Fine-tuning Recommendations

These recommendations are often spun-off to existing or newly created teams with the capacity to:

- Organize, market, and present workshops and seminars

- Investigate, adapt, and support improvements in services
- Arrange and support market feasibility studies
- Market or build awareness of existing business assistance
- Promote or advertise community strengths
- Recognize and reward leadership
- Provide, subsidize, or give space to special business services

It is not uncommon for short-term projects to encounter barriers that raise frustration and uncertainty in the long-term planning process. A feedback mechanism should be established to reexamine recommended objectives, reorganize or reallocate resources, or search for new alternatives to long-term concerns.

Long-term Strategies

Existing business owners and managers have a unique, firsthand view of the employment and investment decisions affecting the community's growth and development. The analysis of their responses leads to recommendations with prompt, visible results. However, for some concerns or suggestions that business leaders present, obvious solutions or easily obtained results may not be available.

Most communities have organized a standing economic development committee or council. Consistency and continuity, community-wide interest and support, and the management of limited resources are essential to their success. Their tasks often are to:

- Gather information from:

  Internal Information Sources — Business Retention and Expansion projects, community attitude surveys, local or regional "shoppers," and other sources of information important to local business and community development.

  External Information Sources — Workshops, newsletters and reports describe demographic and economic changes and their effects. The annual "Industrial Outlook," (U.S. Dept. of Commerce) and "Business in Nebraska," (University of Nebraska, Bureau of Business Research), are two examples.

- Develop and revise goals and annual program objectives around key business concerns:

  Business Competitiveness — Changes in competition, marketing and production need to be monitored and examined. Business incubator ideas and feasibility studies may be designed and supported.

  Labor Force Productivity and Availability — Skills needed, labor projections, and available training are important factors. Distant learning opportunities and programs designed for employee recruiting and retention need to be explored.

  General Quality of Life — Economic development is essential to community viability, but it is not sufficient to satisfy all household and individual needs. Assessments of residents' satisfaction, attitudes or perceptions should be examined. Neighborliness within and among communities has been an avenue through which resident satisfaction has been improved.

Oversight Responsibilities

For many task force members, implementation is the most satisfying phase of these projects. However, when their favorite project is implemented, the other economic development efforts in the community often pause, decline and sometimes stop.

Task forces need to monitor or evaluate the progress of all their implementation plans. Regular visits with existing businesses should be encouraged. The information gathered is used to design and improve ongoing economic development programs. Then every few years a formal Business Retention and Expansion program should be considered.

Making It Public: Assembling and Presenting the Report

It is very important that survey results and task force recommendations are presented to concerned citizens and key leaders. Two reports are usually prepared.

One detailed report describes the findings and recommendations. This report places special emphasis upon the challenges and opportunities for improvement and usually has a limited distribution. Copies are used by the project coordinator, task force members, plus other business and community leaders to implement task force recommendations. The second report, a brief executive summary, highlights survey results and task force recommendations. It is reviewed and discussed at a public meeting and widely distributed to volunteer interviewers, business owners and managers, and community leaders.

Assembling the Report

The full report includes enough background to support the validity of the study. It should describe major findings, recommendations and implementation plans.

The report should also include the following sections:

- A foreword explaining the importance of retaining existing businesses
- Acknowledgments of the task force members, volunteers from sponsoring organizations, participating businesses, and others who helped with the survey
- An introduction briefly describing the Business Retention and Expansion program, the purpose and objectives of the study
- A description of the questionnaire, procedures, and methodology of the study
- The major findings of the survey, summarizing and highlighting the most important information with narrative and graphs
- General descriptions of the task force's red flag and fine-tuning recommendations and long-term economic development strategies
- Appendices consisting of the study's summarized data

It may be helpful to examine a copy of other BRE final reports before starting your own. Examples of final reports can be obtained through the author; the University of Nebraska Center for Rural Revitalization at 58 FyHall, P.O. Box 830947, UNL, Lincoln, NE 68583-0947; Department of Economic Development, 301 Centennial Mall, Lincoln, NE 68509, or from other communities that have completed BRE projects..

Making the Public Presentation

The public presentation of results and recommendations is the final step in the Business Retention and Expansion program. However, it's the first step in using the results to strengthen the community's ongoing economic development. The presentation of survey results and recommendations will help build the interest and support needed to ensure implementation.

The Who, What, When, and Where

The invitation list should include the following people:

- Representatives of the sponsoring organization
- Task force members
- Volunteers
- Owners and managers of community businesses (even those not participating)
- Locally elected and appointed government officials
- Chamber of commerce members
- Economic development committee members
- Representatives of the news media
- Representatives of the educational community
- Regional development agencies and institutions

If the task force decides to host a sit-down meal as part of the meeting, guests for the head table need to be chosen. Include the project coordinator and executive director of the sponsoring agency, local government and other key civic leaders.

Schedule a time and place for the public meeting. A centrally located motel, restaurant or conference facility is a good choice. Check the seating capacity to be sure it will hold the anticipated crowd, but not so big that it gives the impression of a poorly attended meeting with lots of empty seats.

Finally, be certain to check on the availability of audiovisual equipment and presentation aids. Depending on the scope of the presentation, any or all of the following equipment may be needed:

- Podium
- Microphone
- Lights
- Slides, slide projector, spare projector bulbs or an overhead projector
- Stands to hold the projector
- Screen
- Extension cords/adapters

Once the invitation list has been developed and the time and place for the event selected, the invitation should be prepared. An example of an invitation is found in the **Program Tools [p. 54].**

The Actual Presentation

The formal presentation can largely follow the order of the printed report. Slides or overheads highlighting concepts or data from the report will help increase the impact of the presentation.

As an example of a presentation, the Anytown public meeting is outlined below:

I. Introduction and Overview

Project coordinator, Julie Smith introduced herself and briefly explained the roles of the people involved with the project. She summarized the steps of the survey process and highlighted the program's success. Slides or overheads supporting her introduction included:

1. Title
2. Sponsoring organizations
3. The community's base industry
4. Why retention?
5. Phases of the program
6. Key roles and responsibilities
7. Key objectives (present each objective separately)
8. Benefits of the program
9. Types of businesses surveyed

Following her introductory remarks, Ms. Smith asked the task force Chairman, Joseph Conyers, to join her at the podium.

II. Acknowledgements

Task force Chairman Conyers expressed his gratitude to everyone — sponsors, task force members, volunteer interviewers, and the business owners and managers who were interviewed. Special thanks were given to Mayor Paul Carson and members of the city council for their support and encouragement. He then returned the podium to Ms. Smith for the remainder of the presentation.

III. Major Findings

Ms. Smith gave a detailed overview of the study results. Her presentation closely followed the final report that would be distributed at the end of the meeting. Supporting her presentation were the following slides (or overheads):

1. Categories of goods and services sold or manufactured (pie chart)
2. Year firms were established (bar graph)
3. Sales trends (bar graph)
4. General business trends (pie chart)
5. Opinion of the community as a place to do business (bar graph)
6. Transportation used (pie chart)
7. Location of primary financial, business counseling services
8. Employment level trend (bar graph)
9. Wage levels for skilled and unskilled workers (scatter diagram)
10. Number of employees needed in next two years (bar graph)
11. Training/educational needs (list)
12. Plans to move or close all or part of the business (pie chart)
13. Recommendations for new business enterprises (list)
14. Recommendations of business education programs (bar graph)

IV. Recommendations

Here Ms. Smith described recommendations based upon the concerns and suggestions uncovered by the study. She presented implementation plans proposed by the task force. Small discussion groups were formed around special interests to discuss these recommendations and the implementation plans. The "Implementation Plan" found in the **Program Tools [p. 45]** was used to guide the discussion.

V. Wrap-up

Ms. Smith acknowledged economic development as a continuous process. The project was but a milestone. She encouraged participants interested in becoming more involved in business retention and expansion to consider working with the task force members to carry out the recommendations.

Ms. Smith again thanked everyone who participated in the survey process. She also thanked those who were present and invited them to join the task force for complementary hors d'oeuvres.

Ways to Improve Attendance

Experience suggests certain elements are associated with well-attended and meaningful community meetings. Some communities may not be able to follow all of these suggestions because of fewer resources, nonetheless, consideration of the following elements are strongly recommended:

Organize and plan the meeting collectively — The coordinator, facilitator, and task force members must decide *as a group* the date, time, place, format, and people to be invited to the community meeting.

Make the meeting a social event — Have the meeting in a banquet room or hotel. Send out invitations and request an R.S.V.P. Serve refreshments or a meal. A hosted dinner is ideal. If you follow this pattern, dinner can follow the introductions on the agenda. Allow time for mingling and socializing. If you want good attendance and attentive guests, you need to make the meeting more than just a meeting; you need to make it a social event.

Obtain media coverage — Newspaper articles, radio spots, and television coverage before the meeting will help increase attendance. Media coverage gives the event credibility and importance. Media coverage after the event, however, is more likely since more "news" can then be reported.

Highlight program results — Do not schedule a speaker or other activities that will overshadow or divert attention from your purpose. Holding a separate meeting focuses attention on program findings and recommendations. This public presentation provides an opportunity to acknowledge the contributions of task force members and invite others interested in the follow-up work

.

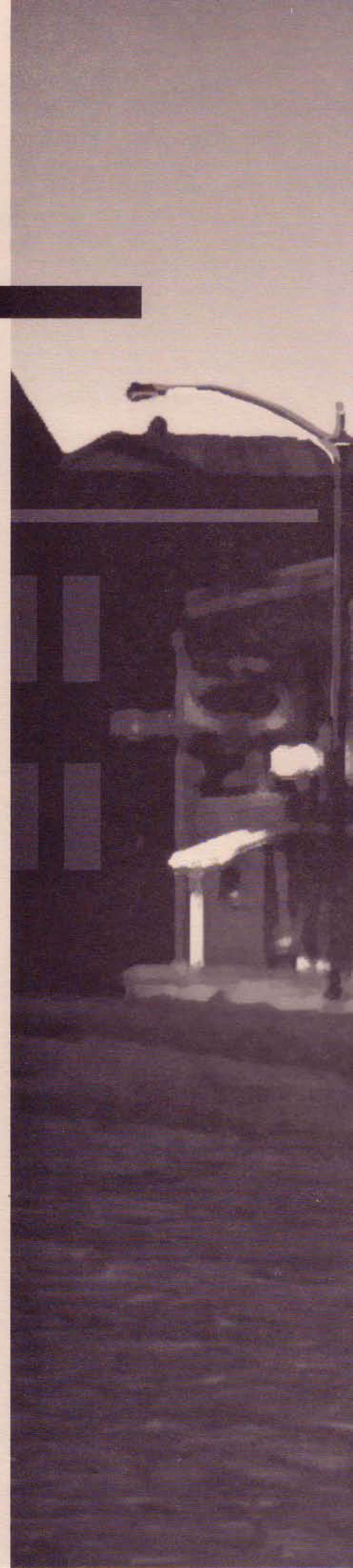
Additional presentations of key BRE program findings and results to civic clubs and community organizations are expected. Select those findings of particular interest to the audience, allowing time for feedback, and identify human and material resources available for follow-up.

Give a personal touch — Although the business leaders have received a written invitation, invite them by phone. This added personal touch will increase attendance.

Do not present findings and recommendations prematurely — The process of gathering and analyzing information, developing recommendations, writing and publishing the final report will take several months. Premature disclosure of preliminary findings and recommendations may create confusion and weaken support and interest. A public meeting that gives guests the first opportunity to read and hear about the summary report will help to clarify the information and build enthusiasm for economic development.

SECTION II

Guidelines for Implementing the Program



Program Tools

Examples to Assist Program Management

Code No. ____________

________, NEBRASKA
BUSINESS RETENTION & EXPANSION
QUESTIONNAIRE

BUSINESS:____

ADDRESS:____

OFFICIAL INTERVIEWED (name, title):

____

INTERVIEW DATE:____

VISITATION TEAM MEMBERS:

____

____

This survey will take approximately one hour of your time. Your responses will be used to improve the competitiveness of existing businesses in the community and the overall business climate.

TO MAINTAIN YOUR TRUST AND CONFIDENCE:
Code numbers will be assigned to each business when this survey is returned to the project coordinator. This cover sheet will be removed before the responses are compiled and analyzed.

REQUESTS FOR BUSINESS ASSISTANCE:
Several public agencies or institutions offer training or financial, technical or other types of business assistance. With your permission, responsible officials will be notified of your special requests or interest in their assistance.

____Permission granted

____Permission denied

Code No. ______________

I. ECONOMIC HISTORY AND CONTRIBUTIONS

1. What year did your business begin in this community? .... 19______

2. What general category(s) of goods or services are sold? (Check all that apply.)

   Agriculture and food processing .... ______
   Construction and building .... ______
   Transportation, utilities, and communications .... ______
   Manufacturing .... ______
   Wholesale trade .... ______
   Business services .... ______
   Retail trade .... ______
   Health care .... ______
   Other (briefly describe) .... ______

   ____

   ____

3. What percentage of your sales are made to local customers from this county? .... ______

4. In what other markets are your goods or services sold? (Check all that apply.)

   Adjoining counties .... ______
   State .... ______
   Other states (please identify below) .... ______
   Foreign countries (please identify below) .... ______

   ____

   ____

5. How many full-time people were employed at this facility last year?

   Administrative and management .... ______
   Skilled (special training required) .... ______
   Unskilled (no special training required) .... ______

6. How many part-time or seasonal workers do you employ?

   Part-time .... ______
   Seasonal .... ______

7a. What was the total value of wages and salaries paid to employees living in this county last year? .... $______

7b. What was the total value of wages paid to employees living outside this county last year? .... $______

8. What was your firm's average annual gross sales for the last three years? .... $______

9. **Are management decisions influenced by affiliation with a parent company, corporation or cooperative? .... Yes ____ No ____**

(If NO, skip to question 11, If YES...)

10. **What influence or assistance is provided by a parent company, corporate or cooperative affiliate:**

	None	Some	A Lot	Total Control
Purchasing	1	2	3	4
Marketing	1	2	3	4
Management assistance	1	2	3	4
Research	1	2	3	4

II. BUSINESS ENVIRONMENT

11. **In the last three years, has the area's *overall* business trend:**

Declined .... ____
Stayed about the same .... ____
Improved .... ____

12. **Rate your satisfaction with the services that directly and indirectly affect your business' performance.**

SERVICES:	Satisfaction High	Satisfaction Medium	Satisfaction Low	Doesn't Apply
Electrical				
Natural Gas				
Telecommunication				
Cable				
Fire Protection				
Police Protection				
Road/Street Maintenance				
Storm Drainage and Sanitary Sewer				
Solid Waste Disposal				
Water Pressure, Supply, Quality				
Regulations and Code Enforcement				
Land Use and Planning				
Primary, Elementary Education				
Secondary Education				
Post-Secondary Education				
Mail and Parcel				
Health Care/Hospitals				
Financial				
Transportation				
Recreation and Fitness				
Child Care				

13. **Which service(s) would you *most like* improved?**

____

____

Code No. ______

14. How could they be improved to better meet your business needs?

______

______

15. What is your opinion of this community as a place to do business?

Excellent .... ______
Good .... ______
Poor (explain why) .... ______

______

______

16a. Does your firm have sufficient room (property) for expansion at your present site or location? .... Yes ______ No ______

16b. If NO, are there other available sites that would adequately meet your needs? .... Yes ______ No ______

17. Does the present traffic system provide reasonably satisfactory access to your business? .... Yes ______ No ______

If not, what improvements would you recommend?

______

______

18. Do your customers/employees have any parking problems? .... Yes ______ No ______

If yes, what are they?

______

______

19. What transportation systems are important to your business for inventory and products sold: (Check all that apply.)

	Inventory	Products Sold
Truck	______	______
Air	______	______
Rail	______	______
Other (describe below)	______	______

______

Code No. ______________

	Within this community	Outside this community but within a one hour drive	More than one hour drive away	Does not apply
(Circle the number that applies)	**1**	**2**	**3**	**0**
20. Where is your company's *primary* financial institution located?	1	2	3	0
21. Where are your firm's credit needs normally obtained?				
Secured, short term loans	1	2	3	0
Long term loans	1	2	3	0
Applied research capital	1	2	3	0
Initial start-up, venture, high risk capital	1	2	3	0
22. Where are special business and financial counseling services normally obtained?				
Financial and risk management	1	2	3	0
Legal devices	1	2	3	0
Insurance devices	1	2	3	0
Accounting and tax management	1	2	3	0
Other business services: (briefly describe)	1	2	3	0

____

____

III. WORK FORCE AND LABOR MARKET CONCERNS

23. In the last three years, has your firm's local employment:

Increased ______

Decreased ______

Remained about the same ______

24a. Have you had problems recruiting employees? Yes ____ No ____

24b. Have you had problems retaining employees? Yes ____ No ____

24c. If YES, briefly describe the problems you experienced in recruiting or retaining skilled or unskilled employees?

SKILLED employees (special training required): ______________________

____

UNSKILLED employees (no special training required): ______________________

____

Code No. ____________

25. What are the average hourly wages (without benefits) of these employees?

Skilled employees (special training required) .... $________

Unskilled employees (no special training required) .... $________

Part-time employees .... $________

26. What benefits/incentives are offered to full-time employees? (Check those that apply.)

Paid vacation .... ________

Paid sick leave .... ________

Overtime pay .... ________

Health insurance .... ________

Pension, retirement plan (outside social security) .... ________

Training support .... ________

Child/adult care services .... ________

Recreation/fitness .... ________

Other benefits (please specify): .... ________

____

27. How many employees will you need to hire in the next two years?

Full-time .... ________

Part-time .... ________

Seasonal .... ________

28. Describe improvements that would make this area (community or business) more attractive to prospective employees.

____

____

29. What training programs would you recommend to meet your changing business needs?

____

____

30. Which institutions do you believe should be called upon to address your training needs? (Check all that apply.)

Area high school .... ________

Community college .... ________

State colleges .... ________

University .... ________

Government agencies .... ________

Others (please identify) .... ________

____

Code No. ____________

IV. BUSINESS PLANS

31. **In the last three years, have your firm's sales:**

    Declined .... ______
    Stayed about the same .... ______
    Improved .... ______

32. **Are there technology or marketing innovations that would improve your business profitability?** .... **Yes** ____ **No** ____ **Not Sure** ____

    If yes, briefly describe them:

    ____

    ____

33. **Are you anticipating any of the following changes in your business during the next three years? (Check all that apply.)**

    Expand facilities in this community .... ______
    Expand in another community .... ______
    Hire additional employees .... ______
    Reduce the number of employees .... ______
    Expand the line of goods and/or services .... ______
    Reduce the line of goods and/or services .... ______
    Sell your business .... ______
    Change production methods, new technology or equipment .... ______
    Other (please describe) .... ______

    ____

34. **Has another city or state contacted you about relocating or expanding your business elsewhere?** .... **Yes** ____ **No** ____

35. **Do you have plans to move or close all or part of your business at this location?** ..... **Yes** ____ **No** ____

    If yes, what can be done to keep your business here?

    ____

    ____

36. **Does your firm buy goods or services outside the area that a local business could provide?.** .... **Yes** ____ **No** ____

    (If No, skip to question 38)

37. **What major types of business goods or services are purchased?**

    ____

    ____

38. **What new business enterprises would you recommend for this area?**

    ____

    ____

Code No. ____________

V. BUSINESS ASSISTANCE NEEDS

39. Which public agencies, educational institutions or other sources of business assistance have you asked for help?

_______________ _______________

_______________ _______________

_______________ _______________

40. What improvements would you suggest to make their assistance more helpful to a business?

____

____

41. Would you like to receive assistance in development or updating your business plan? .... Yes ____ No ____

42. Would you like to discuss your business plans with a local development organization representative? .... Yes ____ No ____

43. Which business educational programs would you recommend? (Check those in which you would be interested.)

Finance/capital sources .... ____
Business/employee relations .... ____
Export/foreign marketing .... ____
Marketing strategies .... ____
Customer service .... ____
Advertising and promotion .... ____
State and federal regulations .... ____
Second language training .... ____
Cultural awareness, beliefs and values .... ____
Other (briefly describe) .... ____

____

44. Other suggestions or ideas for improvement in the local business climate.

____

____

Code No. ____________

VI. QUESTIONS OF SPECIAL CONCERN

Local task force members should discuss and describe issues, problems, or proposals of special local interest. Questions designed to explore these topics should be developed with the project facilitator. These questions should be tested or piloted locally to assess their ability to provide responses useful in addressing related issues and opportunities.

PROMPTLY RETURN THIS COMPLETED QUESTIONNAIRE TO THE PROJECT COORDINATOR IN A SEALED ENVELOPE.

Code No. ____________

FOLLOW-UP SUGGESTIONS and RED FLAGS

(Completed by volunteer interviewers)

1. **What concerns or suggestions appeared to be most important to this business owner or manager?**

____

____

____

____

____

____

2. **Identify and briefly describe requests for a follow-up visit, or responses that point to the relocation, closure, or expansion of this business.**

____

____

____

____

____

____

3. **Rank the urgency of a follow-up visit from one to five with five being the most urgent. (Circle your response.)**

	Not Urgent				Very Urgent
Need for follow-up	1	2	3	4	5

Attach this form to the completed business survey and return it to the project coordinator

BUSINESS RETENTION and EXPANSION ACTION CHECKLIST

I. PREPARATION FOR PROGRAM

	Person Responsible	Deadline
Write a news release announcing the BRE program	________	____
Review the questionnaire and design special questions	________	____
Nominate volunteer interviewers	________	____
Request the volunteers' participation by mail	________	____
Finalize the list of volunteers agreeing to participate	________	____
Develop the list of businesses	________	____
Create a master control list for visitation assignments	________	____

II. TRAINING OF VOLUNTEERS

	Person Responsible	Deadline
Schedule training sessions for volunteers and task force members	________	____
Organize volunteer interviewers into teams of two	________	____
Assign no more than four businesses to each interview team	________	____
Submit a news release describing the training program and upcoming interviews	________	____
Hold two alternateive training sessions	________	____

III. CONDUCTING VISITS

	Person Responsible	Deadline
Mail letters to businesses describing the program and requesting participation	________	____
Send confirmation letter with surveys to participating businesses	________	____
Make appointments for visits	________	____
Complete visits and interviews	________	____
Write letters of appreciation to local businesses	________	____
Reassign businesses missed to special interview teams	________	____

IV. DEVELOPING RECOMMENDATIONS

	Person Responsible	Deadline
Detach cover sheets and send coded surveys to data processors		
Hold task force meetings to review and discuss the identified business concerns		
Identify immediate problems or red flags and design follow-up		
Identify community business climate problems and develop recommendations		
Keep a record of all follow-up strategies		
Write a news release about business visits and early success stories		

V. PREPARING THE FINAL REPORT

	Person Responsible	Deadline
Prepare the first draft of the written project report		
Hold task force meetings to review the rough draft and plan the community meeting		
Develop an invitation list for the community meeting		
Submit a news release announcing the community meeting		
Organize a community meeting to present the survey results and discuss recommendations		
Develop a follow-up news release highlighting the results of the program and the community meeting		

Essential Program Elements

Business Visitation Objectives

Demonstrate Pro-Business Attitude	Improve Communications Channels	Recognition of Target Firm's Economics Input	Assess Business Climate Strengths and Weaknesses	Early Warning of Business Plans

↓

Key Players

Sponsors	Project Coordinator	Task Force Members	Volunteer Interview Teams	"Outside" Facilitator

↓

Critical Decisions

Local Commitment	Select Target Businesses	Recruit Interview Teams	Revise Questionnaire

↓

Interview Questions

Economic History and Contributions	Business Environment	Workforce and Labor Market Concerns	Business Plans	Business Assistance Needs	Special Local Questions

↓

Training and Analysis

Interview Team Training	Business and Community Analysis	Generate Recommendations

↓

Reports: Strengths and Challenges

Special Business Assistance	Fine-tune Existing Programs	Strategic Planning

A JOB DESCRIPTION
for
VOLUNTEER INTERVIEWERS

DUTIES or MAJOR RESPONSIBILITIES

1. Each visitation team will be asked to interviewthree to four of the targeted firms. Team members will be expected to make an appointment with each employer before their visit.
2. The objectives of these visits are:
   - the demonstration of a positive business interest or attitude.
   - to obtain and record complete, accurate responses for all questions.
   - to explore individual employers complaints, concerns or suggestions.

REQUIREMENTS OR QUALIFICATIONS

1. Team members with a genuine interest in the community and concern for economic opportunities of both present and future residents are needed. Their responsibility is to gather information, not to defend current policies or programs.
2. Team members with both business and community decision making experience are recommended to obtain complete and accurate information.
3. Team members need to have sufficient time and dedication to complete their visits, and have communication skills adequate enough to obtain and then accurately report employer responses.
4. The trust and confidence of target employers is essential to the success of expansion and retention efforts. Therefore, the assignment of target firms/employers to visitation team members should be made to avoid the threat of disclosure.

TIME COMMITMENT

All visitation team members should plan to attend one of two training meetings where goals, objectives and procedures will be explained and materials provided.

Interviews should require less than one hour. Team members are expected to review employer's responses for clarity and legibility. They should identify responses that require immediate or special attention and add their recommendations for follow-up.

A recognition meeting will be planned for Visitation Team members and employers to share results, discuss future plans and express appreciation for their contributions.

COORDINATOR'S ASSISTANCE

The project coordinator has been asked to answer all questions or concerns that may arise during this information gathering process. Please do not hesitate to share your suggestions, questions or concerns so he/she can use the information to help others complete the task.

Return the completed questionnaires to the project coordinator. The project coordinator will mail letters of appreciation to target employers signaling the complete of the information gathering process.

BENEFITS AVAILABLE TO VOLUNTEERS

Upon request, letters of recommendation will be provided for promotion, or career development purposes. Participating visitation teams are expected to develop added contacts and strengthen avenues of communication.

VOLUNTEER'S SIGNATURE ______________________________ DATE ______________

COORDINATOR'S SIGNATURE ____________________________ DATE ______________

INTERVIEW ASSIGNMENTS

Volunteer Interview Teams

1. ______________________________

____

2. ______________________________

____

3. ______________________________

____

4. ______________________________

____

5. ______________________________

____

Business Visits

Code #

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________
6. ______________________________
7. ______________________________
8. ______________________________
9. ______________________________
10. ______________________________
11. ______________________________
12. ______________________________
13. ______________________________
14. ______________________________
15. ______________________________
16. ______________________________
17. ______________________________
18. ______________________________
19. ______________________________
20. ______________________________

VISITATION SCHEDULE
for Volunteer Interviewers

Dates	Tasks To Be Completed
6/19	Introductory letter sent out to all business leaders explaining the survey and asking for cooperation.
6/23 - 6/24	Train interviewers.
6/24 - 7/31	Interviewers contact assigned businesses by telephone to schedule interview appointment. Immediately after setting up an appointment, call the project coordinator at (ph. #) so the confirmation letter can be mailed out. Allow enough time for the business leader or manager to review the questionnaire before the personal visit.
(2-3 days prior)	Make a call to confirm the appointment.
6/24 - 7/31	Complete personal interviews. All questionnaires should be completed, reviewed for legibility, and returned to the project office. Return the questionnaires as you complete each interview, rather than all at once. Please return any unused questionnaires.

Return Questionnaires To:
(Project coordinators's name, address and phone number)

BUSINESS ANALYSIS WORKSHEET

Business:____

Contact:____

Title:____

Telephone:____

Address:____

Interviewer:________________________ Telephone:________________

Special request or problem:

____

____

____

Recommendation:

____

____

____

Assigned to:____

Telephone:____

Action/resolution:____________________________________

____

____

Date closed:____

COMMUNITY ANALYSIS WORKSHEET

Questionnaire Section:____

ST = Short-term
LT = Long-term

Nature of Concern	Proposed Recommendation(s)	ST or LT

IMPLEMENTATION PLAN

A. **Problem description or purpose:**

B. **Proposed objectives and responsibilities:**

C. **Committee name:**

D. **Committee type:** ________ **Standing (on-going)** ________ **Temporary**

E. **Chairperson's name:**

F. **Members (people with special interests, talents/skills or knowledge):**

G. **Reporting times (for evaluation and adjustments):**

H. **Budget — resources needed/available:**

I. **Coordination with other committees:**

J. **Other:**

SPONSORING AGENCY LETTERHEAD] **RELEASE #1**

FOR IMMEDIATE RELEASE
[Date]

FOR MORE INFORMATION:
[Project coordinator's name]

Community Economic Development Program Formed

[County or community name] will implement a Business Retention and Expansion (BRE) economic development program [date], according to [project coordinator's name], project coordinator for the program.

The BRE program will help existing businesses within [county/community name] become more competitive and will identify any impediments that discourage local expansion. [Project coordinator's last name] said, existing businesses account for about 40 to 70 percent of all new jobs. Helping established companies increase their competitiveness helps ensure that those firms will stay and expand in the community, thus providing more opportunities to [county or community name].

[Sponsor company's name] is sponsoring the BRE program in [county or community name]. In addition to the support of [name of sponsoring agency], [number] recruited volunteers will help carry out the program. The volunteers will visit about [number] local manufacturers and service businesses to gather information. The questionnaire the volunteers will use was prepared by the [county or community name] and state sponsors to identify individual business needs, concerns, and suggestions about the local climate for business.

[Project coordinator's last name] emphasized the confidentiality of the information gained from these visits. The results will be reviewed to find solutions to the problems. Their findings will be presented at a public meeting. Assisting [project coordinator's last name] with the analysis of these problems is [outside facilitator's name if applicable], who will act as the facilitator and [number] task force members. These members, comprised of civic, business and educational leaders, will work in partnership with the project coordinator and facilitator. They include [list the task force members].

Their findings will be presented at a public meeting. "[Quote from project coordinator describing the cooperative nature of the program or his expectations,]" said [project coordinator's last name].

XXX

RELEASE #2

[SPONSORING AGENCY LETTERHEAD]

FOR IMMEDIATE RELEASE
[Date]

FOR MORE INFORMATION:
[Project coordinator's name]

Volunteers Complete Economic Development Program Training

Two training sessions for participants in an economic development program that begins this week were held [date] at the [place], according to [project coordinator's name], project coordinator for the program.

[Project coordinator's last name] said, "Volunteer interviewers attended one of the two two-hour training sessions to become familiar with the [county or community name] Business Retention and Expansion (BRE) Program.

The BRE program will help existing businesses within [county/community name] become more competitive and will identify any impediments that discourage local expansion, according to [project coordinator's last name].

"Quote from the project coordinator emphasizing the importance of the volunteer interviewers to the program," said [project coordinator's last name].

The program is designed to stimulate economic development by helping existing industry, according to [project coordinator's last name]. [Project coordinator's last name] pointed out that to help industry, a community must first identify industry's needs and problems and then address those concerns to improve the local business climate.

The two-member volunteer teams will visit [number] local firms between now and [date]. During each visit, the volunteers will use a questionnaire to gather information about each business. The two training sessions last night were held to help prepare the volunteer's for their interviews.

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

During the training, the volunteers were able to ask questions of [Facilitator's name, title] who has helped many communities throughout Nebraska with similar Business Retention and Expansion programs. They also reviewed the questionnaire and the background material on the businesses they will be visiting.

[Project coordinator's last name] emphasized that the information gathered through the surveys will be strictly confidential. The information will be reviewed by the project coordinator, facilitator, and task force members. They will address the problems, concerns, and needs mentioned by the businesses, with the intention of improving the local business climate.

"[Quote from project coordinator about his/her expectations of the program or the results ad recommendations at the end]," [project coordinator's last name] said.

XXX

[SPONSORING AGENCY LETTERHEAD]

FOR IMMEDIATE RELEASE:
[Date]

FOR MORE INFORMATION:
[Project coordinator's name]

Community Economic Development Survey Completed

The [county/community] Business Retention and Expansion (BRE) program completed a [city-wide or county-wide] survey of [number] businesses. The program's task force will present its findings and offer its recommendations for economic development at [time], [date] in the [name of the room] of the [place]. All those interested are encouraged to attend.

The survey, sponsored by the [sponsor company], is the basis of a comprehensive profile of the [city's or county's] business community. The participants represent over [number] percent of local businesses.

Looking at the progress of the program, which began last [month], Project Coordinator [name] expressed [his or her] satisfaction with the results. Said [project coordinator's last name] "[Quote about the cooperation received from the business community.]"

People interested in attending the results presentation should contact [project coordinator's last name] at [phone number and/or address] by [deadline date] for a reservation.

XXX

[SPONSORING AGENCY LETTERHEAD]

FOR IMMEDIATE RELEASE
[Date]

FOR MORE INFORMATION:
[Project coordinator's name]

[City/County name] Business Profile Presented

The [City/County name] Business Retention and Expansion (BRE) program task force presented the findings of the recently completed [city-wide or county-wide] business survey. The goal of the survey, sponsored by [sponsor's name], was to build a data base that will help the community establish communication links with local businesses and provide adequate services as those businesses grow.

The final report highlighted several aspects of the survey and outlined the recommendations for action. The recommendations included: [list several recommendations].

"[Quote about the follow-up planned for the recommendations]," said [project coordinator's name], project coordinator of the program.

Over [number] businesses were represented at the event. Also attending were [names of local or state dignitaries present].

XXX

Letter # 1

(Sponsoring Agency Letterhead)

[Date]

[Inside address]

Dear [Name]:

Thank you for agreeing to participate in the [county or community name] Business Retention and Expansion (BRE) Program. As a volunteer interviewer you are a critical element in this project, sponsored by the [Sponsor company's name].

The general purpose of the BRE program is to help our existing industry. To do this, we have asked local leaders, like yourself, to visit several firms to gather information about their needs, concerns, and opinions of [county or community name] as a place to do business. This information will help us improve our local business climate to 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 of the volunteers. You need to attend only <u>one</u> of these sessions that lasts two and one-half hours. These sessions are:

1. [Date, time, and place of session 1]
2. [Date, time, and place of session 2]

Please complete the enclosed response card and send it to me at your earliest convenience. If you are at all unsure about participating, <u>please</u> attend one of these sessions anyway. After the meeting you can make your decision. <u>You cannot be an interviewer unless you attend one of the training sessions</u>.

We greatly appreciate your cooperation in this community-wide effort. Your participation as a volunteer is critical to the success of the program because we would be unable to carry out this program without the help of our local leaders.

If you have questions about the program, please call me at [phone number].

Sincerely,

[Project coordinator's name]
BRE Project Coordinator

Enc.

(Sponsoring Agency Letterhead)

[Date]

[Inside address]

Dear [Name]:

I am writing to invite you to take part in the [county or community name] Business Retention and Expansion (BRE) Program. Our community's overall well-being depends on the present health and future growth of local businesses. To help firms stay and expand in [county or community name] positive steps must be taken to identify and meet the needs of these firms.

An in-depth survey of [county or community name] businesses is currently being conducted under the sponsorship of [sponsor company's name]. The interviews are conducted by volunteers from the business community, civic groups, and the sponsoring organization(s). The interviewers have been carefully selected and trained for this task. <u>All information will be kept confidential</u>.

The survey has several objectives, among them are to:

- Establish ongoing communication between local government and local business;
- Develop a clear understanding of your view of [county or community name] economy; and
- Determine if there are any obstacles that might discourage you from expanding in [county or community name].

One of our interviewers will contact you soon for an appointment. Once you have accepted, you will be sent Part A and Part B of the questionnaire. You are encouraged to review the questions and complete those that call for a number, a rank or a yes/no response. During the interview, the team will check these responses but will spend most of the time discussing ways to strengthen the business climate.

Your candid responses to the survey questions will provide a vital benefit to your company and the community. You will be provided with a summary report when an analysis of the study results is completed.

Your cooperation is very much appreciated.

Sincerely,

[Project Coordinator's Name]
BRE Project Coordinator

Enc.

(Sponsoring Agency Letterhead)

[Date]

[Inside address]

Dear [Name]:

Thank you for agreeing to take part in the [county or community name] Business Retention and Expansion (BRE) Program sponsored by the [sponsoring company's name]. This letter confirms your appointment with [business leader(s) name(s)] at [time and date]. You are encouraged to review these questions and complete those that call for a number, a rank, or a yes/no response.

During their visit, the volunteer interviewers will check these responses. But most of the time will be spent describing business concerns, opportunities and improvements that would strengthen our climate for business. It is important that all of the survey be completed so we can produce an accurate profile of local businesses.

All of your answers to the questionnaire will be kept confidential. Only aggregate data from all the participating businesses will be used in the final report and recommendations.

Sincerely,

[Project coordinator's name]
BRE Project Coordinator

You are invited to attend the presentation of the final report of Anytown's Business Retention and Expansion Program

Tuesday
October, 20, 1994
4:30 p.m.
Squire Room - Anytown Inn
250 Third Street
Anytown, Nebraska

The program will be followed by complementary hors d'oeuvres.
Printed copies of the survey findings and recommendations will be distributed at this meeting.

R.S.V.P. 555-2670 by Friday, October 16, 1994

Evaluation of
Retention and Expansion Business Visits

_______________ County/Community

1. What was your role in the local business retention and expansion program? (Circle all that apply.)

   a. Coordinator
   b. Task force member
   c. Volunteer interviewer
   d. Individual interviewed during firm visit
   e. Facilitator(s) ________________________________
   Agency/Institution

2. What is your employment affiliation? (Circle all that apply.)

   a. Elected public official
   b. Appointed public official
   c. Education official
   d. Economic development professional
   e. Private employer
   f. Private employee
   g. Retired
   h. Other (please specify)____

3. How successful was this program in demonstrating a pro-business attitude? (Circle one.)

   Not Very Successful **Very Successful**

   1 2 3 4 5

4. How successful was this program in helping business firms learn about state development programs? (Circle one.)

   Not Very Successful **Very Successful**

   1 2 3 4 5

5. How successful was this program in helping local leaders understand the strengths and weaknesses of the community from the perspective of local businesses? (Circle one.)

   Not Very Successful **Very Successful**

   1 2 3 4 5

6. How important was it that University economists analyzed the data collected on the firm visits? (Circle one.)

   Not Very Successful **Very Successful**

   1 2 3 4 5

7. Overall, in your judgment, how effective have the recommendations and the implementations (BRE plans) *been* for improving local business competitiveness?

   a. Very effective
   b. Effective
   c. Uncertain
   d. Not effective
   e. Harmful

8. What has been the most important accomplishment?

____

____

9. Overall, in your judgment, how effective, *will* the BRE plan be in improving local business competitiveness in the next two to five years?

a. Very effective
b. Effective
c. Uncertain
d. Not effective
e. Harmful

10. What is the most important recommendation that needs to be accomplished?

____

____

11. Please rate the following factors of the BRE program.

	Excellent	**Good**	**Fair**	**Poor**	**Don't Know/ Not Applicable**
1. Content of the questionnaire	a	b	c	d	e
2. Length of the questionnaire	a	b	c	d	e
3. Maintenance of confidentiality	a	b	c	d	e
4. Resolution of local problems	a	b	c	d	e
5. Support from state staff	a	b	c	d	e
6. Development of plan	a	b	c	d	e
7. Implementation of strategic plan	a	b	c	d	e

12. If you were asked by a business or government in a neighboring community whether or not that community should establish a BRE program, would you recommend it?

a. Yes, definitely
b. Yes
c. Uncertain
d. No
e. Definitely not

Issued in furtherance of Cooperative Extension work, Acts of May 8 and June 30, 1914, in cooperation with the U.S. Department of Agriculture. Kenneth R. Bolen, Director of Cooperative Extension, University of Nebraska, Institute of Agriculture and Natural Resources.