

## Introduction to BR&E Models

There are several different ways in which a BR&E visitation program can be implemented in a community or region, but they basically start the same way. As seen in the BR&E Community Based Visitation Models Schematic, the first step in any of these programs is to identify the need for this type of program in the community and to identify the local champion or leader for the program. Once this is accomplished, the type of visitation program that will ultimately be used can be decided.

While the visitation model schematic demonstrates four basic types of programs, these programs are delineated primarily by their leadership. In the examples shown here, the program labeled as the Volunteer Visitor process is led by a local champion who is not a professional economic developer. The other programs, while similar in many respects to the Volunteer Visitor process, are typically led by a local economic developer with some professional credentials. Each of these program processes has strengths and none can be described as being the best for all situations. What follows are brief descriptions of each program process and the way it is implemented in the community.

### **Volunteer Visitor Process**

The Volunteer Visitor Process is one of three processes that truly involves the community in the BRE effort. In this program, a champion (who is not associated with being a professional economic developer of any type) for the program's concept emerges. This person will organize a community information meeting (see the manual at the end of this notebook) to describe the program's concept and to generate program support from the community at large.

One of the goals of the community information meeting should be to begin the process of recruiting a task force or steering committee to guide the process of the program and to provide a link from the community to the businesses. While the formation of the task force should certainly begin at the community information meeting, the task force's membership will likely be fluid throughout the program's duration. This will be especially true if the task force identifies and undertakes a number of projects related to the findings from the business visits and background preparation works.

The next step in this process is to conduct an orientation session for the task force in which the scope and goals of the program are fully defined and an outline/timeline is developed. The task force orientation meeting and follow-up work will result in a BR&E survey instrument being chosen or developed, a plan for recruiting volunteers to visit the firms being targeted and developing/implementing training sessions for the volunteer visitors.

The next steps are similar between all visitation programs, although the order might vary a bit. In the volunteer visitor program, the volunteers visit the firms and have a true conversation with the firms while completing the survey and capturing any additional issues that the firm might share. These materials are then returned to the task force where the process of

identifying and addressing the red and yellow flag issues takes place and a report and analysis of the survey results is prepared.

Once the issues/concerns/needs of the targeted businesses have been identified, the task force can begin to draft the strategic plan which can be the hallmark of the visitation process. This plan utilizes the survey analysis to develop a set of goals, objectives and strategies that the community and its various public and private components can utilize to strengthen the targeted business sector. However, to obtain community input and buy-in, at least one additional community wide meeting is needed to present the results of the report, share the initial draft of the strategic plan and to allow the community an opportunity to provide valuable input and buy-in to the plan. The task force should utilize this information to develop the final plan and have a formal presentation of the plan to the community and celebrate the program's achievements.

After the celebration is held and the strategic plan's content is publicized to the community, the implementation of the plan begins. The actual implementation of the plan's strategies can take many forms and the program's champion and task force will have to examine each strategy to determine the most effective means of implementation including partners, implementation methods, resource allocations, etc. Above all, it is vital to not allow the conversations with the community's businesses to die, but to remain ongoing and vibrant so that additional issues can be identified and addressed.

The Volunteer Visitor Process and the Developer Led Process (discussed next) are very much community based programs and the New Age Continuous Process follows close on their heels. In the Volunteer Visitor Process, a local champion who is not associated with a formal economic development process provides leadership for the initiative. In the other visitation-based programs, this role is held by an economic development professional of some type.

### **Developer Led Process**

The Developer Led Process is exactly the same as the Volunteer Visitor Process, except that the role of the local champion is filled by an economic development professional of some type. This person could be the local industrial recruiter, chamber of commerce director or full- or part-time

Business Retention and Expansion Director.

This type of process is fairly unique, but demonstrates a partnership between the economic development process and the community. If this type of process is utilized, tremendous sustainable partnerships can be formed; however, the process takes a considerable amount of effort and organization on the part of the economic development entity.

### **Segregated**

A variation on the Volunteer Visitor and Developer Led Processes is the Segregated Process. As seen in the third column of the schematic, this process is led by an economic development

professional who assumes the responsibility for the logistical and operational aspects of the program.

In this process, the economic development professional takes the lead for the overall BR&E program and typically does not involve the community through the creation of a taskforce that would act as a steering committee to guide the process.

The BR&E coordinator assumes a very large level of responsibility with this type of process. In this scenario, the coordinator assumes the task of choosing or developing an appropriate survey instrument and may or may not host an introductory meeting to inform the community about the BR&E program.

The process itself is also somewhat different from the two previously discussed. In this process, the coordinator will distribute the survey instrument to the firms and the firms are asked to complete and return the instrument before the business visits take place. This allows the program coordinator to gain as much knowledge as possible so that important issues can be explored in depth when the firm visits do occur. The completed surveys will yield a tremendous amount of information and will also allow the program coordinator to identify red and yellow flag issues that may exist, discuss these with business owners in the firm visits, and to begin the process of identifying partner organizations that can address these issues.

Once the firm visits are completed by the program coordinator (there are no “outside” or volunteer visitors involved in the process), the remainder of the program closely follows the two processes previously discussed. The survey and firm conversation analysis are used to develop a draft strategic plan that, as in other cases, will be presented to the community for their input and buyin. Once the community has had a chance to review the plan, the program coordinator will complete it and present the final version at a community celebration of the BR&E effort. After this celebration, the coordinator can begin the process of implementing the plan (it is vital to remember that while the coordinator is primarily responsible for implementing the plan, that person must be adept at building partnerships and facilitating the cooperation of other agencies to accomplish the plan’s goals and objectives.) Finally, as with all the processes presented here, it is imperative that the coordinator continue conversations with the firm to continue building the relationships and sense of appreciation for the community that this type of process can yield.

### **Continuous Process**

The final process presented here is the Continuous Process. This process is the most different of the four and, as such, has unique strengths and weaknesses. It is the most simple process of the four; the person that coordinates this process is known in the community as an economic development professional. This coordinator chooses or develops the survey instrument, visits the firms to complete the survey and discuss any potential issues that may be present, and then identifies and works with partnering organizations to address red and yellow flag issues.

Throughout the process, including the continued firm conversations, the coordinator is continually performing analysis on the conversations held with businesses. This approach does not utilize the community in any way except for the public (perhaps) support of the coordinator's home organization. However, this type of process naturally provides insights into isolated trends that are emerging in the community where the other types of processes (the Volunteer Visitor and the Developer Led processes, in particular) provide a comprehensive snapshot of the entire business community's thoughts at a relatively single point in time.

### **Summary**

While these processes represent four distinct methods of implementing a Business Retention and Expansion Visitation Program, the truth is that a community will most likely use a combination of the features of two or more of these models to initiate its own program. The process used in a particular community needs to be "fitted" for that community; there is no "cookie cutter" or "one size fits all" approach that works equally well for all communities. Furthermore, there are many resource allocations that will limit the type of process that can be used. For example, are there enough people in town who would be willing to assume the role of a volunteer visitor **and** adhere to the confidentiality rules of the program? Or, does the program's leadership have the capacity to analyze the survey data and prepare a meaningful report? Solutions to these questions will be contained in the succeeding sections of the certification course.