The Connecting Businesses and Community (CBC) Handbook

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UNIVERSITY OF MINNESOTA
EXTENSION

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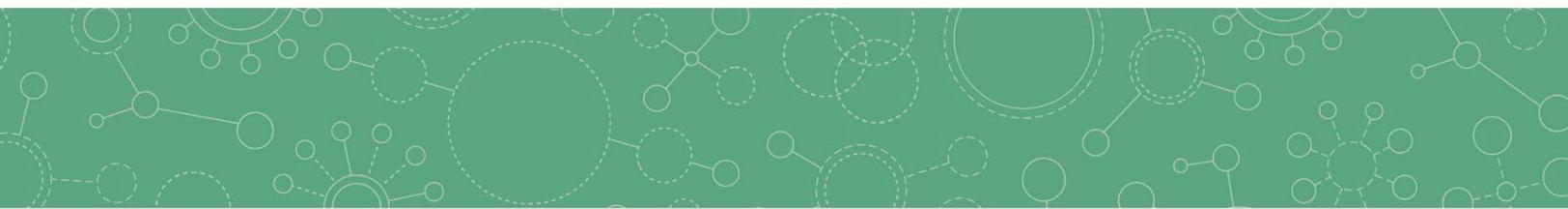
As requested by our Extension program participants,

modernized and revised from the Business Retention and Expansion Visitation Program manuals by Scott Loveridge and George Morse (1997).

(See reference section)

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Chapter One

Why do a CBC project in your community?

Is a Connecting Business and Community project for you and your community?

If you are interested in encouraging economic development in your community, this book is for you. Whether you are a professional economic developer, a chamber of commerce official or member, a local government official, an education official, or an interested community member who wants to see your area become more economically resilient, you will be interested in this approach to economic development. It's called the Connecting Businesses and Community (CBC) program (formerly in Minnesota it was named the BR&E Strategies Program until 2017). CBC is a specific and highly developed approach to business retention and expansion (BRE) programming. University of Minnesota Extension has delivered this program method in communities since 1990. This deep program experience has allowed it to further develop and improve.

This book will help you understand this local development strategy, its benefits and costs, and what you and others need to do to successfully implement this program locally. This chapter will help you decide whether or not to adopt this strategy, and how to do it. This book and the accompanying video can help you see the possibilities for your own community. The actual results depend upon **you and your community.** The book is designed to support you in DIY (Do It Yourself) efforts so that you can implement the program based on your locally available people and resources. It also is used in the University of Minnesota Extension's BRE course and the CBC project that it offers to Minnesota communities.

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

- Why are existing businesses important in local economic development?
- What is the Connecting Businesses and Community (CBC) program?
- What are the program objectives and process?
- What roles do local community members and leaders play in the program?
- What are the benefits to a community and to the volunteers in the program?
- What are the costs of the program?
- What assistance is provided by universities, state agencies, and others?
- How can you learn more about this program?

Why are existing businesses important to economic development?

Existing businesses are an engine of economic growth. Research has traditionally indicated that the majority of American jobs are attributable to existing businesses. In fact, 63% to 80% of Minnesota job gains came from business expansions in the years 2002 through 2022 (Minnesota Department of Employment and Economic Development). When a community commits to working with its existing businesses, it commits to working with a group of

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businesses that are important to the future of the local economy, and to those who have already invested in the community.

Many communities have pursued policies designed to attract outside businesses to move into the area. However, such a strategy is not likely to be effective if existing businesses are not happy with the local business climate. Sometimes communities that are successful at attracting new businesses do not see much growth. While new businesses come in the front door, their existing businesses downsize or exit through the back door. Economic development professionals have a consensus that paying attention to the survival and growth of their existing businesses is very important. The International Economic Development Council, Business Retention Expansion International, and University of Minnesota Extension all validate this consensus with the BRE professional development courses they have each offered for decades.

What is the Connecting Business and Community (CBC) program?

Business Retention and Expansion International defines BRE as follows*: In economic development, business retention and expansion is a program designed to strengthen the connection between companies and the community while encouraging each business to continue to grow in the community. Through direct interactions, events, and research, the program seeks to gain insight into business practices, planned future actions, as well as the challenges of targeted companies. Then, to turn this "business intelligence" into value added services, programs, and/or*

products that address individual and shared company opportunities and problems.

Examples of the hundreds of BRE possibilities include:

- Developing the community's ability to welcome and attract new community members.
- Providing technical training and skills for new employees.
- Collaborating on regional workforce development.
- Providing management seminars for employers.
- Helping businesses identify local sources of input supplies and materials.
- Encouraging better labor/management relations.
- Reducing the cost and upgrading the quality of local government services.
- Establishing better school-workplace relations and fit.

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

The Connecting Businesses and Community (CBC) program at University of Minnesota Extension is a BRE planning process for setting priorities for community sponsored initiatives and resources that best fit the needs of local businesses. The CBC project model recognizes that communities cannot do everything that they would like to do to help their existing businesses. Your community probably does not have the funds or the leadership time to do it all. Therefore, you have to decide what types of projects could do the most for your local businesses. Your priority projects depend on the types of businesses in your

community, the competitive pressures they are facing, the nature of your local public services, the qualities of your labor force, and many other factors.

What are the CBC program objectives and process?

These are the standard objectives for University of Minnesota Extension's CBC project:

- To demonstrate to local businesses that the community appreciates their contribution to the local economy.
- To help solve immediate business concerns.
- To increase local businesses' ability to compete in the global economy.
- To implement a strategic plan for economic development.
- To build community capacity to sustain growth and development.

Often, local communities will adopt additional objectives for their CBC projects.

The following flowchart shows the CBC project process encapsulated in a 3-step diagram.

1. **Research step 1** shows the organizing tasks for mobilizing the business visitation.
2. **Prioritize step 2** shows the tasks for a) responding to individual business issues and b) analyzing the aggregate results and prioritizing action projects.
3. **Implement step 3** shows the tasks for acting on and sustaining priority project action.
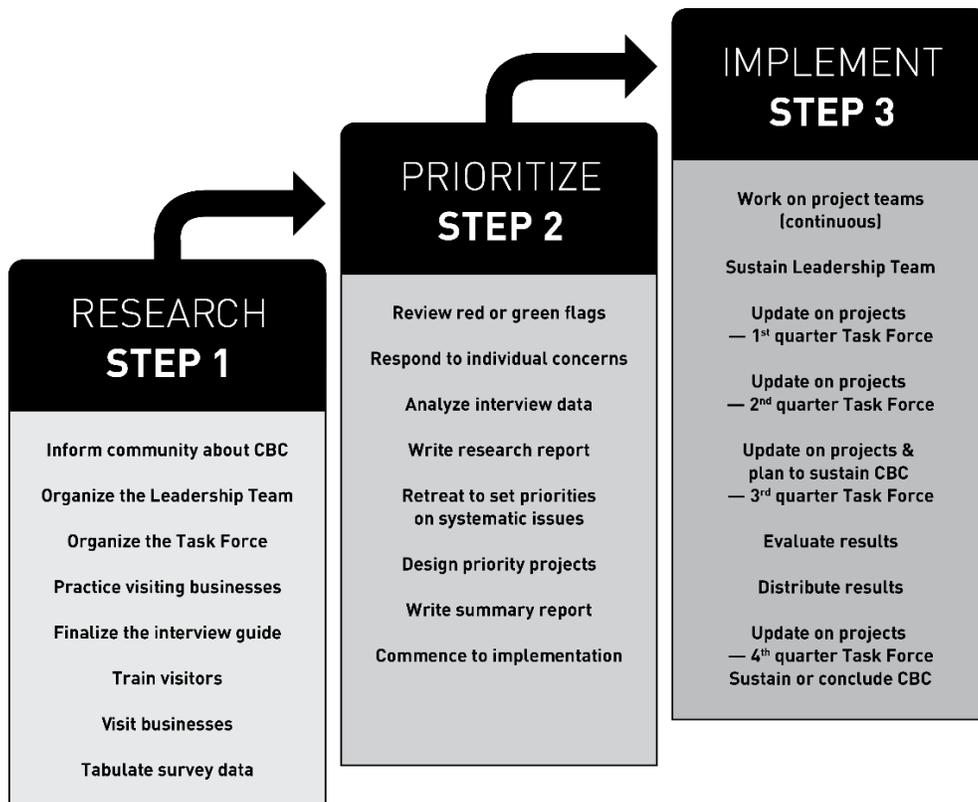
Figure 1: CBC 3-step process flow chart

What roles do local community members and leaders play in the program?

Overall coordinator's role

As with any successful team endeavor, someone needs to be the spark plug for it. The spark plug for the CBC project is the **Overall Coordinator** (or chair of the leadership team). Their formal duties include convening the leadership team and serving as meeting chair.

Leadership team's Role

Three or four other local community members need to share leadership duties with the Overall Coordinator: Communications Coordinator, Visitation Coordinator, Business Response Coordinator, and Milestone Meeting Coordinator.

The **Communications Coordinator** helps coordinate communications via media coverage, social media, and other channels.

The **Visitation Coordinator** helps organize the task force and visitation teams to prepare for the business visits.

The **Business Response Coordinator** helps organize the team to respond to the businesses' urgent and immediate concerns.

The **Milestone Meeting Coordinator** helps organize the task force retreat, the red and green flags meeting, and the community commencement meeting.

All members of the leadership team participate in all stages, with *each* Coordinator serving as the quarterback (aka the team leader) at different stages of the project. Chapter 2 of this handbook gives more details on the roles and responsibilities of each coordinator role.

Task force's role

The CBC task force's main responsibilities are to:

- Set the overall policies for the project (e.g., number of businesses to visit, types of industries to include, number of visits per team).
- Recruit sufficient volunteers to conduct the project (each task force member usually recruits one or two volunteer visitors).
- Assist in securing written endorsements from local organizations.
- Attend the business visitation orientation and visit at least two to four businesses each.
- Participate in two meetings to handle the immediate concerns of local businesses, to assist in the follow-up work, and to learn about business needs and issues.
- Review the research results and set priorities for long-term projects for CBC (done in a four-hour mini retreat).
- Assist in planning the community commencement meeting.
- Assist, as appropriate, in the implementation of the projects.
- Attend quarterly progress reporting sessions for a year or more after adopting the priority projects.

Each task force member will need to contribute about 20 hours prior to the community commencement meeting. This is spread over several months for an average of less than one hour per week. Naturally, some task force members will spend more time because they become very involved in helping businesses with immediate concerns, but almost always this is part of

their "day job" responsibilities. Each task force member's specific responsibilities for ongoing implementation are arranged after the projects are identified.

Diversity of task force membership

As illustrated, your CBC visitation task force should consist of five different groups of community leaders: (1) business leaders, (2) economic development professionals, (3) local government officials, (4) education officials, and (5) other key community leaders. Your task force needs this diversity because each of these categories can contribute to the solution of local business development problems. For example, business owners can help the task force better understand the problems expressed in the business interviews. School officials have been able to help start school/business partnerships and to reform educational programs to address business needs. Local elected officials need to learn about concerns with public services. And professional developers often have information on programs, such as regional, state and federal programs, that are needed by businesses. Earlier BRE research has shown that groups that have a broad-based task force are more likely to implement their priority projects than those that don't.

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

Eligibility for task force

What skills do you need to be an effective task force member? The task force needs recognized community leaders because an

influential group is needed at various times during the process. It also needs emerging community leaders and others who do not necessarily see themselves as leaders, however they are willing to help their community (they often are fine with being called followers). The following are characteristics of successful task force members:

- Able to handle the immediate concerns of the businesses, including nudging and persuading those who can assist.
- Helping select and assist with the CBC priority projects.
- Attracting the attention of the public to priority projects.
- Possess a basic understanding of the local economy.
- Work easily with others.

Whom should we invite to be on the task force?

Business leaders:

- Chamber of commerce officers
- Bankers or other financial institution members
- Local utility managers
- Business owners or managers
- Representatives from other development groups

Economic development professionals:

- Chamber of commerce staff
- Regional utility professionals
- Regional development organization staff
- Staff from other development groups

Local government officials (elected or appointed):

- City government officials
- County commissioners or officials

Education officials:

- Superintendents of elementary, secondary schools
- Vocational, alternative, and charter school leaders
- Community college presidents
- Cooperative Extension educator

Other community leaders, emerging leaders, and reliable followers

- Religious leaders
- Nonprofits leaders
- Other community leaders

Volunteer visitors' role

Volunteer visitors must attend a two-hour orientation. During orientation, the leadership team will help the volunteers identify their partner for visiting businesses and learn how to interview business managers or owners. They also will be assigned to the businesses they will visit (two to four). This requires between six to eight hours of total time. These visits are usually expected to be completed within a reasonable time period.

Volunteer visitors typically represent a cross-section of professions and organizations. In addition to businesspersons and economic development professionals, ministers, plumbers, stay-at-home parents, and school superintendents have been volunteer visitors. No matter their background, all volunteers should be enthusiastic about the CBC project and understand the confidentiality of the information they will be gathering.

Local influential leaders who are active in the community are often valuable volunteers because they recognize the importance of helping to improve the community's economy and well-being. However, the most

important qualification for volunteer visitors is reliably performing high quality visits.

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

Visited business operator's role

Typically, 30-50 businesses are visited, and sometimes as many as 100 businesses. Generally, volunteer visitors are instructed to interview the business owner or operator, but if this person will be unavailable for a long period of time, then volunteers are instructed to interview the highest-ranking management official possible.

How Much Time Does It Take?

A CBC project requires some time to accomplish. The range is typically from 2-4 years depending on the time the community needs to work through each of the three big steps. The time required for each step is shown below.

Research - Step 1

RESEARCH
STEP 1

Inform community about BRE

Organize the Leadership Team

Organize the Task Force

Practice visiting businesses

Finalize the interview guide

Train visitors

Visit businesses

Tabulate survey data

Step 1 takes 5-9 months

Usually, 1-2 meetings will suffice
~1-2 months

Depending on how many meetings and how motivated, ~1-3 months to organize the leadership team and task force

~1 month to do these. Can overlap with the team organizing

Typically, there are 2-3 training sessions over a few days or a week

Business visitation ranges from 2 to 3 months

Tabulating data can be done very quickly as batches of surveys are sent to tabulator. 1-2 weeks per batch.

Prioritize - Step 2

PRIORITIZE
STEP 2

Review red or green flags

Respond to individual concerns

Analyze interview data

Write research report

Retreat to set priorities
on systematic issues

Design priority projects

Write summary report

Commence to implementation
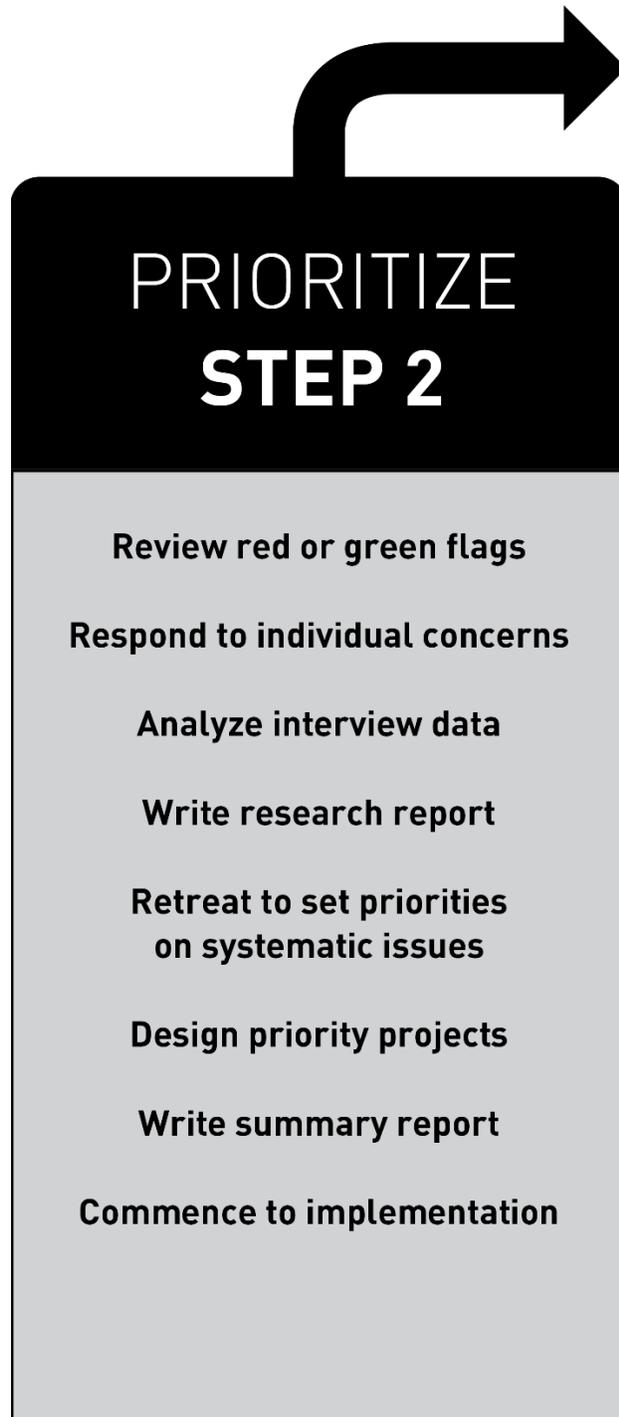
Step 2 takes 4-7 months

Done in batches over a few meetings ~1-2 months. Time for responding varies with number of people and responses needed and is independent from the items below.

Campus research review meeting, analysis and report writing ~2 months

Retreat takes place in the community

After the retreat, the community's priority project teams make plans and UMN includes these plans in a report summarizing the entire project

1-3 months total from retreat to the community commencement

Implement - Step 3

IMPLEMENT
STEP 3

**Work on project teams
(continuous)**

Sustain Leadership Team

**Update on projects
— 1st quarter Task Force**

**Update on projects
— 2nd quarter Task Force**

**Update on projects &
plan to sustain CBC
— 3rd quarter Task Force**

Evaluate results

Distribute results

**Update on projects
— 4th quarter Task Force
Sustain or conclude CBC**

Step 3 takes 1-5 years

This step is the most variable. The timeline is affected by these factors:

1. The relative difficulty and mix of the priority projects
2. The capacity of the task force members and staff
3. The resolve and persistence toward goals

Convening the task force quarterly is key to maintaining forward momentum, even though the project work is done by individuals or small teams.

If invited, UMN Extension does a ripple effect mapping evaluation with the Task Force ~2 years into the Implement Step. Then the community distributes results.

Reasons volunteers participate

Many volunteers participate because they care about the economic development of their community. Some volunteers (public officials, Extension educators, economic developers) participate because the project is essentially an extension of their current job. Some volunteers participate because they want to learn more about local business and industry, while others participate because they want to learn more about their community in general. Still others (public officials, new community members, business owners and managers) participate because they want to meet new people and develop more personal and professional relationships, while others (retirees, homemakers) participate because they want to become more active in their community. And still others participate because of peer pressure. These are just some of the reasons that volunteers have been motivated to participate in the several decades of the CBC project's existence. A final note—whether you call them volunteers or something else (e.g., CBC visitors), they are extremely valuable contributors to your CBC success.

How the CBC program benefits volunteers and communities

Benefits to volunteers

Residents and local leaders who have worked with the CBC program cite the following reasons why they have been active participants:

1. CBC visits are fun

You will have fun! People say, "This is fun" after completing their first business visit. You'll enjoy socializing with other key community leaders and participating in important community decisions.

2. CBC program builds networks

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

3. CBC program is a learning experience

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

4. CBC program brings the community together

In many communities, residents and local leaders are thinking about their future, but they're not working together to have an impact on the future. The CBC program can bring your community together. Businesspersons, local government officials, education officials, economic developers, and interested residents all work together for the benefit of existing local businesses and their community.

5. CBC program is doable, and it gets results

Residents just like you and your neighbors have done this program in all sizes and types of communities. Excellent CBC programs have been completed in rural,

suburban, and urban areas and are getting results. Naturally, it's more rewarding to work on projects that are both feasible and achieve results.

6. CBC program demonstrates that the community cares about business

Just visiting businesses demonstrates that your community cares about its local businesses and appreciates their economic contributions to the area. It's surprising how many business leaders feel unappreciated and have not been personally told that the community values them. Note: this does not mean that you have to agree with everything a business does or vice versa.

7. CBC program is low risk, but it pays to carefully plan and implement your program

If you follow the guidelines in this CBC Handbook, the CBC program is safe.

Benefits to communities

1. Improved public relations with existing businesses

Most CBC programs send two community leaders to visit each business; this results in improved public relations with them. Many business owners have said, "This is the first time anyone has come to visit us and really listen to our opinion."

2. Help businesses solve problems

Businesses often have concerns that require immediate attention. The CBC approach outlined in this handbook is an effective means of quickly addressing many of these concerns. For example, the Portage County, Ohio CBC program provided business incentive information to 22 of the 69 businesses visited. Four of these businesses planned investments of

over $20 million and the addition of 117 jobs.

In St. Paul, Minnesota, a business owner mentioned during a CBC visit that the business might be forced to close due to a fire code problem. The CBC program contacted the St. Paul Port Authority who worked with the business and the fire department to develop a solution, saving 124 jobs. While reviewing the survey results, task force members in Harrisville, West Virginia learned that local businesses were losing business and missing shipments because the road into town was poorly marked. The task force worked with the state government to correct the problem.

3. Help businesses become more competitive

Profits are essential for the retention and expansion of businesses. For a business to survive, it must make a profit—at least over the long run. If your local businesses can make more profit in your community than in others, you won't have any trouble retaining them. Since profits increase with higher prices per unit and lower costs per unit, other things being equal, CBC programs that help businesses reduce costs or increase values add to the businesses' competitiveness. For example, when the Becker Otter Tail Dairy CBC project in Minnesota found financing was a bottleneck for expansion of many local dairy farmers, the task force set up a dairy financing conference, which attracted 90 local bankers. Over $3 million in new dairy facilities were in development. In Taylor County, West Virginia, the local CBC task force found that workers lacked math skills, so they worked to establish a business and education partnership. This resulted in the

development of a new program, which provides math training to workers. To give incentives to workers, a local greenhouse gave raises to workers who completed the math program. With their new math skills, workers make fewer mistakes when they mix chemicals, which saves the company money, and underscores concern for environmental issues.

4. Develop action-based strategic plans for CBC visitation

Few communities can tackle all of the BRE projects that could benefit local businesses. The CBC process outlined here helps the task force use the data to reach a consensus on high priority projects. A former study found that one hundred percent of the most successful CBC programs had written action-based strategic plans. For example, the Anaconda, Montana CBC program developed an action-based strategic plan, which resulted in the following projects:

- The development of a golf course where an ugly hazardous waste site had been located at the entrance to the community.
- The retention of a state hospital, saving five hundred jobs.
- The development of business startup educational programs resulted in the forming of eleven new businesses and the expanding of seventeen home-based businesses.

5. Build community capacity for business retention and expansion

The most important long-term benefit of this action-based approach to BRE is that it builds the capacity of the community to do business retention and expansion. Four important aspects of this improved capacity are:

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

A study of an Ohio CBC program found stronger collaboration among a wide variety of local leaders—due largely to the process used by the task force to deal with immediate individual concerns. If you want to attract new businesses, you must understand your community's strengths and weaknesses—from the perspective of the business world. No group is in a better position to tell you what these are than your existing businesses. Prospective businesses considering your area as a location will send a team to visit them.

What are the costs of a CBC project?

Aside from the benefits, what are the costs of doing a CBC project? Let's take a look at these. The original time estimates were developed by George Morse and Scott Loveridge in the 1990s. The estimates shown here have not changed much from the originals.

What is the value of volunteer time?

How should you consider the value of time contributed to the CBC project? And who should you consider as a volunteer for the

project? Some people have suggested to us that public staff or chamber staff may be expected to do business visits as part of their jobs. It has also been suggested by some that "volunteers" may be perceived as lower quality than "professionals". The authors believe, for the purposes of a CBC project, that we can impute the time of any participating community member as a contribution to the CBC. Also, we believe everyone can be trained to make quality contributions to the CBC, even if they are not economic development professionals (more on that later in this book).

Earlier, we mentioned that most people consider it fun to visit businesses. So, CBC visits are self-rewarding to volunteers and not likely something they are going to think of as a cost. Nevertheless, volunteer work can be recognized in dollar terms. If you decide to consider it this way, community members, local leaders and business owners collectively contribute a minimum of ~$46,000 in time (~1,370 hours) to an average CBC project (based on the Independent Sector's estimated value of a volunteer hour in 2024 at $33.49).

How long does It take?

A CBC project takes two to three+ years to complete. Organizing the local leadership team and task force can take one to three months. The task force training and business visits take from four to six months. Responding to individual business issues and action-based strategic planning efforts take four to seven months. The rest of the time is devoted to implementing the plans. Local economic development takes time and effort. It would be a mistake to recruit the leadership team and task force members on the promise that the project commitments would be completed in six to 12 months. That promise would forecast a project that develops a strategic plan that sits on the shelf and never gets implemented. Or even that the leaders and volunteers would get burned out before they even get to the strategic plan.

How many hours are required per person?

Naturally, this varies considerably with the community, its problems, and the local leaders, but on average, the greatest individual time is spent by the leadership team, followed by the task force, and then the volunteer visitors. All three groups typically visit businesses. In addition, the task force meets to decide on CBC directions and goals and to consider the survey results and future actions. Often, the leadership team convenes between task force meetings to set the stage for effective future meetings.

Table 2: Summary of estimated time commitments of CBC participants *

Participants	Number participants per CBC project	During research and prioritize steps (9 to 16 months)	During Implement Step (1 to 5 years)
Community members & leaders	*Total Hours Per Person*		
Overall coordinator	1	70	40
Other leadership team members	3-4	45	30
Task force members	20-30	20	20
Volunteer visitors	15-30	10-20	0
Business owner/operators	30-100	1.5	0
Technical assistance	*Total hours per person*		
CBC consultant**	1	100	30
Data entry person	1	24-45	0
Analyst/report writer	1	100-120	0
Professional review team	15	5	0

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

**The CBC consultant is an optional role. This time estimate assumes the CBC consultant provides the assistance outlined in the Assistance from a CBC Consultant section (Chapter 2). If not, this estimate should be assigned to the overall coordinator or another leadership team member. Sometimes University of Minnesota Extension educators play this role for Minnesota communities.

Cost of doing applied research and consulting for a CBC project

On the research side, estimating the costs is easier. There are costs for entering the data, doing the spreadsheet work, analyzing the results and writing the reports, printing the reports, and traveling to the community to present the results. Together with the time and travel of the CBC consultant, there are an average of 285 hours of services required in each community CBC project. If the University of Minnesota Extension provides these services, this is ~$18,000 to $20,000 of costs for the staff work.

Other local costs

In addition to project fees, you need to plan for expenses associated with mailings and meeting expenses. Plan on postage and photocopy expenses of about $15 per business targeted for a visit. Effective volunteer participation requires organizational meetings. Volunteer participation is usually enhanced if a small amount of money is available for light refreshments at meetings. Recruiting a strong local leadership team is critical to obtaining sufficient financial support for an effective CBC project.

What assistance is provided by universities, state agencies, and others?

The most successful CBC projects have written reports. The written CBC research report is important because it summarizes the data from your surveys and presents it in a strategic problem-solving framework. In addition, a separate written summary report is used to describe the implementation projects that are adopted by the CBC task force as priorities for action. The research report should list the problems (as reported by the businesses visited) and the possible solutions. These are outlined in strategic themes with suggested projects within each theme to address the problems. A CBC group research review process helps identify themes using a SWOT (strengths, weaknesses, opportunities, and threats) to develop a quality research report that responds to what the businesses said.

The summary report is prepared after task force and leadership team members make commitments to act. The report summarizes the key research report findings and lists the selected priority projects. The names of task force and leadership team members who agree to help with specific projects are listed in the project descriptions.

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

- They can be objective on causes of local problems.
- They can bring new perspectives on potential solutions.
- They have access to a range of expert opinions and resources.
- They provide professionalism in the content and presentation of the report.

A few states have a state-level organization that analyzes the data and prepares the research reports. For instance, University of Minnesota Extension provides this service for Minnesota communities. Check with your state or provincial economic development agency, or state association, for information on who does this in your state. Alternatively, you can obtain a list of BRE consultants from the Business Retention and Expansion International web page (http://brei.org/consultant-directory/). Some of them do applied research whereas others provide other BRE-related services.

How can I learn more about this program before I decide?

Visit other communities

Your best bet is to talk with local leaders in a community that has done a CBC project. If you have the time and funds available, travel to one of these communities to visit with their leadership team and members of their task force.

Virtual visit

If you don't have either time or funds available, an excellent alternative is to watch the video that comes with these materials and then interview one or more local leaders from another community via Zoom or Google Meet or a speaker phone.

Chapter Two

Initiating a CBC project in your community

Introduction to initiating a CBC project in your community

While CBC projects offer tremendous benefits to communities, they also are a lot of work. As earlier projects have discovered, there are many opportunities for delays, pitfalls, and embarrassment. Yet, over the past three+ decades, community CBC leaders and researchers have accumulated a lot of experience and evidence on ways to reduce the risks of failure and embarrassment and ways to improve the odds of success.

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

This chapter is a study guide to help small groups wishing to start a new CBC project. After a group of three or four local people complete this self-study chapter, they will be able to:

1. Decide if the CBC project fits their community's needs.
2. Determine if their community can do this project successfully.
3. Recruit a local team to coordinate a CBC project.
4. Explain the project to other local leaders.
5. Recruit leaders and community members to participate.
6. Select the businesses to be visited.
7. Organize the volunteer visitor training.
8. Facilitate media coverage.
9. Organize follow-up efforts.

Self-study or CBC consultants?

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

Just like learning to swim, there are different philosophies on the best way to learn about CBC projects. An "old school" approach might suggest the quickest way for a person to learn to swim is for them to be tossed into the deep end of the pool and let them figure out how to swim. The modern approach states that a little coaching will improve the percentage who actually learn to swim.

"Luck" happens when preparation meets opportunity. To increase your team's luck with this program, you will need to prepare well. Studying this CBC Handbook and taking the University of Minnesota Extension's BRE course are excellent resources for preparing for a successful CBC project. Another optional resource is using a CBC consultant.

Assistance from a CBC consultant

This section outlines the role of CBC consultants and describes the functions that they play during the typical trips to the community. In Minnesota, Extension

educators typically play this role; however, anyone who has taken University of Minnesota Extension's BRE course could potentially serve as a CBC consultant, or potentially a BREI affiliate (see below). Again, this is an optional role. Whether the consultant knows more about CBC than the leadership team is not nearly as important as whether the consultant can inspire the local CBC team to get things done well and on time along the way.

Role of CBC consultants

CBC consultants coach local leaders and community members who work on this project. The consultants facilitate the learning process for the local team. Initially, (often before a group has decided whether they want to do the program) the consultants will provide the names and contact information for experienced participants in other areas that have been through the program. This allows a group to visit with their peers in other locales to evaluate whether the program really fits their community. If the group decides to proceed, the consultant can help the local team explore the various roles that community members must play and the other aspects of the program.

While this handbook covers these topics, it is impossible to cover every circumstance. The CBC consultant can often provide this additional detail and context. To give some picture of how the consultants assist communities, we outline the trips they take to communities.

Trips to community by consultants

Generally, CBC consultants take between eight and 12 trips to your community over the two years that it takes to implement a CBC project.

Here are the typical trips and the type of assistance provided to a community. Details on each of the first four trips follow later in this chapter. Details on trips five through eight are covered elsewhere in this handbook. If your CBC consultant lives far away from your area, many of these meetings can connect the consultant in virtually.

Trip 1: Meeting with leadership team
This introductory meeting is often held with a small group of four to six persons to introduce the project. The consultant will assist in providing the names of community members in other communities that have done the program. This makes it easier for the team to check out the program.

Trip 2: Meeting with leadership team
This session explores the roles of community members and ways to recruit them.

Trip 3: Meeting with leadership team
At this session, the leadership team completes its plan of work in preparation for the volunteer visitor training.

Trip 4: Task force meeting and practice visits
The consultant goes on two practice visits with the leadership team and then meets with the task force to explain the program. Generally, the consultant provides the basic interview guide (aka survey), with the community able to add three or four local questions.

Trip 5: Volunteer visitor training
The consultant provides the primary leadership for this session to train the volunteers. However, they will want to have two or more members of the leadership team to lead parts of the training.

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Trip 6: "Red and green flags" meetings

The consultant goes to at least one of the two or three meetings held to deal with the warning flag issues (those with immediate urgent concerns). At this meeting, the consultant will coach the group on the process for dealing with red and green flag issues. The role of the consultant is to explain the process and answer questions. The task force members make all the decisions on what to do about local red or green flags.

Trip 7: Task force retreat

Together with the researcher who has analyzed the data from the business visits, the consultant and the leadership team lead this meeting. Again, the task force makes all the decisions on priority projects.

Trip 8: Community commencement meeting

The consultant shows the leadership team formats that other communities have used and plays a minor role in the presentations.

Trips 9 - 12: Quarterly meetings of task force

After the completion of the planning phase of the CBC project, the task force should plan to meet at least quarterly over the next year. Experience has shown that groups that no longer meet once the plan is developed seldom implement their plans. The consultants attend these meetings, although their role is much more open-ended. Sometimes they can provide connections and ideas that can help the local implementation teams. However, at this point, their role is essentially to encourage the task force to live up to their own aspirations.

Business Retention and Expansion International (BREI) certification and consultants

Business Retention and Expansion International (BREI) is a nonprofit, professional association of economic development professionals who are working for the advancement of business retention and expansion. BREI includes members from state and provincial development agencies, local city/county ED professionals, universities, utilities, and private consultants. Any individual interested in BRE is welcome to join.

BREI offers a certification program for professional development in the BRE space. Their course covers a broad spectrum of topics and models for BRE work in communities. They have a directory of BRE consultants that can be consulted to find assistance that you desire. https://brei.org/consultant-directory/ Note that few of these individuals may be experienced with the CBC model itself.

Is our community ready to do a CBC project?

CBC projects require a lot of work. The rest of this CBC handbook is dedicated to preparing you for what it takes to be successful, so that you can be successful in connecting your community to your businesses and moving economic development forward. So, what is required for success with CBC? You can use the following questions to understand what is required before you decide to start preparing. Later, you can use them to see if you are truly ready. If you cannot say yes to each of these questions*, you probably need to do some more preparation or modify your expectations for your CBC

project. Or perhaps think about another approach to business retention and expansion.

Does our CBC project have:

1. A visitation coordinator who has completed the orientation?
2. An overall coordinator who has completed the orientation?
3. A business response coordinator who has completed the orientation?
4. A milestone meeting coordinator who has completed the orientation?
5. A communications coordinator who has completed the orientation?
6. A task force of 20 to 40 local community members who have been individually contacted? And with the following groups represented:
   a. Business leaders?
   b. Economic development professionals?
   c. Local government officials?
   d. Educational professionals?
   e. Other community leaders and people willing to help their community?

7. A task force that met as a group for orientation and decided to proceed with the project?
8. Written pledges from the task force members who agree to participate for at least two years?
9. Written endorsements from other local groups within the community to support the CBC process?
10. A clear understanding of the guidelines for the project, including the role and costs, if any, of outside assistance providers?
11. A plan to get the data analyzed and the report(s) written?

12. A detailed work plan that lists the task to be done, the person handling it, and the target date? (Some dates can only be estimates beyond the volunteer visitor training.)

If the answer to any of these is "no," your project is probably not quite ready for publicly announcing that you are ready for training volunteers for the business visits.

*For Minnesota communities that seek outside assistance, University of Minnesota Extension has a formal application process for its Connecting Businesses and Community program to ensure mutual success for the community and itself in launching a community CBC project together.

What's needed for our community to become ready for CBC?

Communities that have never heard of this approach to doing business retention and expansion will want to evaluate whether it fits their needs. In economic development practice today, most BRE work is done by economic development professionals. Thus, the CBC approach stands out because of its emphasis on broad-based community engagement beyond the ED professional(s) (i.e., with business leaders *and* community volunteers *and* other stakeholders).

The following tips are aimed at helping community leaders really understand the program. Communities adopt the CBC model with enthusiasm once they understand it. Groups who are thoroughly introduced to it can decide for themselves whether it fits and whether they are ready to launch a CBC project.

Tip 1: Be sure you understand the CBC approach

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

Tip 2: Use the self-assessment guide

Often you will hear, "We have already done BRE." If the community has recently done BRE visits in the same fashion as described here, as well as the other activities described in Steps 2 and 3 of CBC, then probably they should not do it again. To evaluate how earlier efforts compare to CBC, complete the self-assessment guide" found in Appendix A.

Tip 3: Use the video training materials

A video can say a lot of things you can't. Check the section of this book "Using videos to introduce the program and train volunteers" for hints on how to use it effectively. University of Minnesota Extension's CBC/BRE video collection is curated on YouTube: z.umn.edu/BREVideos.

Tip 4: Share BRE research report and summary

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

CBC (aka BRE) summary reports can be found in the University of Minnesota's Digital Conservancy: https://z.umn.edu/BREexamples (search for "summary").

Tip 5: Give examples of CBC benefits

To get good examples of program benefits, read Chapter 1 of this book. Also, look for examples or for the names of people in other communities that you can call.

Tip 6: Contact experienced leaders in other communities

While a personal visit to another community by a group is best, these contacts can be made in many ways. Some groups do it virtually. (See the section "Using videos to introduce the program and train volunteers for tips on this.) Others split up a list of names and make individual phone contacts. Regardless of the method, talking to experienced CBC leaders in other communities that have done CBC is the best means of understanding both the benefits and the costs of the program.

Leadership team and task force orientation

The five basic steps of the leadership team orientation are:

> Meeting 1: Is it for our community?
> Meeting 2: Volunteer roles in CBC projects
> Meeting 3: Plan of work
> Meeting 4a: Practice visits to two businesses
> Meeting 4b: Task force orientation

Meeting 1: Is it for Our community?

Participants

- Four to 40 community members interested in learning about the program.
- CBC consultant: as a resource person.*

Purpose

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

- Decide if they wish to do the program or identify additional questions that need exploration.
- Identify persons who might serve on the leadership team.

Distribute in advance

CBC brochures or information sheets, paper or online versions.

Handouts at meeting

- Self-assessment guide in Appendix A (used only if there has been a prior BRE program in the area).
- Discussion questions for Meeting #1: Is this CBC project for our community? (Appendix B)

Suggested agenda (about two hours)

Introductions .... 10 min.

Community example (video segment 19:06 on z.umn.edu/BREvideos) .... 19 min.

Discuss and prepare questions .... 10 min.

Virtual visit or speakerphone with experienced CBC leader .... 20 min.

Local discussion .... 30 min.

Identify persons for leadership team .... 20 min.

Set next meeting (if proceeding) .... 5 min.

Handouts for next meeting

- Chapter 1 – Why CBC in your community?
- Discussion questions for Meeting #2: Objectives and roles of leaders? (Appendix B)

Details on the meeting

See Chapter 4: Using videos to introduce the CBC project and train volunteers

Participants in Meeting 1:

Some local initiators prefer to keep the attendance small at this first meeting until a group of four to six local leaders has a chance to carefully study the program and be prepared to answer questions on how it might work when the larger group meets. In other cases, the local initiators prefer to have the larger group attend this meeting and give their blessing to exploring the

program further. There are pros and cons to both approaches. Those using the first will be able to answer more questions about how this differs from past attempts at BRE and what the benefits and costs would be. Those using the second will know if the group is behind them from the start.

*The CBC consultant is an optional role (see p. 22 for a description)

Meeting 2: Volunteer roles in CBC projects

Participants
- Four to six local leaders or community members willing to provide leadership to project
- CBC consultant - as a resource person*

Purpose
By the end of the meeting, participants will:

- Be able to describe the role of volunteer visitors and task force members.
- Understand the quarterback analogy for coordinators.
- Be able to describe the major responsibilities of each of the coordinators.
- Have decided who will serve as coordinators.
- Have selected some of the task force members.

Distribute in advance
- Chapter 1 – Why CBC in your community?
- Discussion questions for Meeting #2: Objectives and roles of leaders? (Appendix B; see p. 72)

Suggested agenda

Program benefits...20 min.

      Discussion of question 1*

Role of volunteer visitors and task force...10 min.

      Discussion of question 2*

Leadership team roles...60 min.

      Discussion of questions 3 to 5*

Selection of task force members ....30 min.

      Discussion of question 6*

Handouts for next meeting
- Chapter 3: CBC coordinator roles
- Chapter 4: Setting up the business visitation
- Discussion questions for Meeting #3: Plan of work in Appendix B (see p. 73)

Discussion of the agenda

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

The key point on the roles of volunteer visitors versus task force members is that the volunteer visitors only visit businesses, while the task force members visit businesses and fill additional roles.

If there is a CBC consultant, they will outline the details on the roles of the different coordinators. Alternatively, each person can read the sections in Chapter 3: CBC coordinator roles and Chapter 4: Setting up the business visitation.

Finally, the leadership team needs time to start selecting the task force. Each member of the leadership team should agree to make a few personal contacts prior to the next meeting.

Meeting 3: Plan of work

Participants

- Leadership team (four to six persons)
- CBC consultant - as a resource person*

Purpose

By the end of the meeting, participants will have:

- Finalized the task force membership
- Finalized the plan of work in Appendix B (see p. 73)
- Developed recommendations on type and number of businesses
- Prepared an agenda for a task force meeting

Distribute in advance

- Chapter 3: CBC coordinator roles
- Chapter 4: Setting up the business visitation
- Discussion Questions for Meeting #3: Plan of work in Appendix B (see p. 74)

Suggested agenda (about two hours):

Finalize task force membership..30 min.

        Discuss question 1*

Finalize the plan of work ....40 min.

        Discuss questions 2 - 4*

Develop recommendations on businesses...20 min.

        Discuss questions 5 & 6*

Prepare agenda for task force meeting ....30 min.

        Discuss questions 7 - 9*

Discussion of the agenda

There probably isn't a more important task that the leadership team does than select/recruit the task force. If you pick a strong task force that represents a broad cross section of the community and that is willing to work hard, the project will be successful. If you review Chapters 3-4 of this handbook, it will be relatively easy for you to finalize the plan of work. At this meeting, it is a question of coordinating schedules and dates and each coordinator asking for assistance from the rest of the team as appropriate.

Holding a task force meeting before the volunteer trainings is ideal. The task force then can fully understand the program and agree to become the CBC group (even if each person has individually agreed to do it). They also will get to decide on the number of businesses and how to recruit volunteer visitors. See the next section for an agenda. You can look for ideas on how to get good attendance in Chapter 3 (see p. 43 and 46).

Meeting 4a: Practice visits to two businesses

Participants

- Leadership team

Purpose

By the end of the practice visits, the leadership team will have:

- Visited one or two businesses
- Completed: Report on practice visits in Appendix K (see p. 90)

Distribute in advance

- A current interview guide (aka survey) from University of Minnesota Extension, or other
- Report on practice visits in Appendix K (see p. 90)

If you are a member of the local leadership team guiding a community through a CBC project, you don't want to be embarrassed at a volunteer training session. So don't skip this step. Occasionally, participants will insist that visitors should memorize the survey or take an unscripted conversational approach to the business interview. **This should be discouraged for several reasons** that are outlined later in the training section of this handbook (see pp. 61). When you conduct these practice visits, you can report on how well the businesses received you. You also can avoid attempts to make major revisions to the survey. And finally, you can discover any rough spots in the interview guide prior to having ~100 or more copies printed. See *Chapter 3: Practice business visits in the community* for details on doing these practice visits.

Note: for CBC consultants, often meetings 4a and 4b can be done on the same trip to the community.

Meeting 4b: Task force orientation

Participants

- Leadership team and task force members
- CBC consultant - as a resource person

Purpose

By the end of the meeting, the task force members will be able to:

- Explain the goal of the program and how it works.
- Determine the number and type of businesses to be visited.
- Suggest several additional local questions for the survey.
- Recruit another person as a firm visitor.
- Select a date for the volunteer visitor training.
- Distribute in advance:
- CBC task force brochure. This goes with a letter announcing the date, time, location, agenda, and list of those invited to the meeting. All those invited are personally contacted prior to mailing the letter.

Suggested agenda (two hours):

First Hour: Part 1. Introduce the program

Opening remarks (coordinator) .... 10 min.

Review purpose of meeting and CBC (coordinator) .... 5 min.

3-community example (video segment 19:06 at z.umn.edu/BREvideos) .... 19 min.

Explain the role and expectations of the task force .... 5 min.

Small groups develop questions .... 5 min.

Resource person (often virtually) .... 15 min.

Second Hour: Part 2. Task force decisions

Determine number and type of businesses to visit .... 20 min.

Discuss addition of two or three local questions .... 20 min.

Discuss other issues and goals for the CBC .... 10 min.

Ask task force members to recruit volunteers .... 5 min.

Select dates for training .... 5 min.

Discussion of agenda

Details on Part I are given in Chapter 5: Using videos to introduce the CBC project and train volunteers.

Generally, the leadership team will recommend the type and number of businesses to be visited. For example, is this CBC project aimed at mixed-sector businesses, manufacturing, downtown/retail, tourism, or another sector? Likewise, the leadership team will recommend the number of businesses to visit. Typically, this is between 30 - 60 visits. Sometimes, communities achieve even more business visits, but this takes a great deal of effort. Chapter 4: Setting up the business visitation has more details on this item.

CBC task forces are encouraged to develop a few (i.e., two to four) questions on pressing local issues. Here are some examples:

- Do you have any comments for the city that you are in or nearest to? Please circle the city here. (For a county-wide project.)
- Which of the following energy topics would you like to know more about?
- Does the current transit system in the city serve as a barrier or benefit to your business during the hiring process?
- Should the chamber continue activity X?

At this stage, the exact wording for these is not critical, but it is important to develop a consensus on the top issues. Use Appendix B: Task force meeting minutes as a worksheet for keeping track of who attended and what decisions were made.

To maximize attendance at the training, the task force should pick the best date together.

Chapter Three

The CBC leadership team

Introduction

Coordinators' roles as members of a CBC leadership team

If you think you might want to become a member of the local team that helps organize the program, you are in the right place. This chapter will help you better understand what the CBC leadership team can expect to do, and how each role relates to the other members of the team.

Before diving into team roles, let's first discuss the mindset that drives this whole mission. The Connecting Businesses and Communities (CBC) program is not an individual mission—it is a team effort. While one person might be able to push things forward for a while, long-term impact only happens when leadership is shared and responsibilities are divided between these members. When everything depends on a single individual, burnout or stepping away from the CBC project can stall or even unravel progress already gained. As part of the leadership team, it's important that you stay connected to the bigger picture. You don't need to know every detail, but understanding the overall flow and offering support at key moments will make the whole team more effective. Your job will be to help out at these times, or ask for help when *you* are responsible for coordinating a particular aspect of the program.

Each coordinator serves as the quarterback
To understand your role a little better, think of a football team. A quarterback can't do the whole job—other players are needed.

When it is your turn to organize part of the local CBC effort, it is like you are serving in the role of team quarterback. You're not the whole team.

As a member of the leadership team, you will help provide overall direction to the local CBC project. Every member of the team coordinates a different part of the CBC project. Your job is to help keep that piece of the process organized and progressing, and not to do all of the work individually. Strong coordination means making sure no steps or details are missed and that others know how to support one another when needed. This is a team effort, and spreading out responsibilities makes it much easier for participants to lead when called upon.

This handbook will provide guidance on:

- What makes an effective leadership team
- The key roles within the team and how they contribute to the success of the project
- Tips for organizing the work that fits the needs of the community and leadership team (see page 56 for overview of different functions of the leadership team)

You may be tempted to have one person be the "everything" coordinator, as this was the model used in the early days of the development of CBC efforts. However, splitting these functions among several people makes it much more feasible for volunteers to manage this type of CBC project.

Benefits of serving on leadership team

The benefits of serving on the leadership team are real and significant. They are the reason that an overwhelming majority of former coordinators recommend that other communities do the program. The following paragraphs describe some of the potential benefits. It's up to you to decide which of these might be the most important for you.

High visibility in successful projects

Being part of a highly visible, effective effort can help you build credibility for other initiatives. Few economic development programs provide as much opportunity for visibility and yet are highly likely to be as successful as the CBC program. While some other economic development programs can be successful, few have the high success rate of the CBC program. There are seven or eight opportunities for the program to get news media coverage, giving it high visibility (See Appendix L, p. 92, for sample press releases).

Identification of major issues

If you have been in the community for a number of years, the survey results probably won't surprise you. However, the results of the survey are still likely to help you. As one former coordinator put it: "I don't expect to learn anything new from this. But having the numbers will help me show other community leaders what is happening here in our town. That will make my job a lot easier." Since few public-private partnerships in community economic development ventures can be done without the broad consent of community leaders, the CBC program can be helpful in this fashion.

If you are new to the community or to economic development, the CBC program is a good way to become familiar with the major issues. In addition, the data from local businesses provides facts for drawing conclusions on these issues rather than just hunches or information from one or two local leaders.

Improved efficiency in contacting businesses

Each business visit takes a total of two to three hours, counting travel and preparation time. If you tried to visit all these businesses by yourself, it would take between 60 to 200 hours just to visit them, and you wouldn't have time for following up on individual business problems! And if partnering with UMN Extension, they will supply an interview guide for you to use during the business visits, which means you don't have to spend time reinventing this part of the visitation process.

Opportunity to learn about local economic development

Every project does some analysis of the data collected during the business visits. UMN Extension will also provide information on local trends and the economic structure of the area. This can give you a chance to assess the local economy and its best strategies for successful development.

Chance to understand local leadership

No matter whether you are new or experienced in a leadership role, this program will help you identify good partners for the future. If you are new, you may identify a good mentor as part of this process. If you are experienced, you may identify someone to carry on and support what you have been doing. Strong programs in economic development depend on more than one person. A broad-based

team of local leaders must be involved in developing a vision of future development and reaching consensus on the steps necessary to reach this vision.

While this section has presented the benefits of serving on the leadership team, you will get a better picture of this if you talk with an experienced member of a CBC leadership team. UMN Extension, or possibly BREI.org, can provide you with a list of these individuals and tell you a little bit about their background and CBC project so that you can pick ones that are most directly relate to your circumstances.

Eligibility requirements for coordinators

If you are wondering if you're eligible to serve on the leadership team, ask yourself the following questions: Are you well respected in the community? Can you systematically organize parts of the effort? Do you have some experience in community economic development or in leading volunteer groups? If you answered yes to any of these questions, then you're eligible. It is best if some of the members of the leadership team have some experience in community economic development and in leading volunteer groups. You may work in a job where you can count your work with the local CBC project as a job assignment. If you are a retired executive, a dedicated local business person, or a community leader able to devote your time to this effort, you also are well qualified to serve on the leadership team.[3]

Comment on leadership team organization

The leadership team does not necessarily have to have four or five members, but there are some real advantages to using a team of four or five. Without a team, there is a risk of major disruptions if a single individual serving as coordinator becomes seriously ill or unexpectedly must resign due to changes at work. Without a business response coordinator, this aspect often gets short-changed, even though most CBC projects claim that it is an extremely important aspect to achieving success. Similarly, there is a need for careful attention to the logistics of the mini-retreat and community commencement ceremony. When there is no communications coordinator, the media aspects seem to be left for last and often are not done. This is a big mistake because the media can be effective in drawing the community's attention and support to the process and the plans developed for improving the local business climate.

Where to meet?

If possible, it's best to pick one relatively central location and meet there consistently throughout the CBC process. Some communities prefer to rotate the meeting place, reasoning that the leadership team and the task force can spread out the commuting costs. While this may be a nice gesture, it also can create problems. First, it makes it difficult to know whether meeting equipment (projectors, flip charts, photocopiers) are available on-site. Second, rotating the meetings means that someone must make sure everyone knows where you are meeting each time. Choose a room that is appropriate for the size of the group. If your 20-person task force meets in a room built for 100 people, task force members may conclude you wanted more people but couldn't get enough interest. If you try to squeeze your 20-person task force into the 10-person room that you use for leadership team meetings, claustrophobia is likely to

crowd out creative thinking about local business problems.

Virtual meetings (using popular options such as Zoom or Microsoft Teams) are another option, especially after relationships and working norms have been established (for example, meetings to discuss logistics or coordinate the next meeting for the leadership team). Meeting virtually can provide many benefits when arranging to meet in person is challenging or becoming difficult to coordinate, such as improving attendance, documentation of meetings through transcripts, and efficient use of time for working professionals and community members. In our experience, we have found having initial meetings in person and ensuring periodic face-to-face meetings and interaction is essential for team-building and coordinating efforts, particularly during the implementation stage.

Visitation coordinator

Details in Chapter 4: Setting up the business visitation

If you are considering serving as the visitation coordinator and are wondering if you are qualified, you will need to be able to: introduce the program to local businesses, organize volunteer training, oversee mailing of information, and track the progress of volunteers in completing their visits. If you are interested in this role, you get your own chapter dedicated to helping you be more effective. It is done separately because of the detail under the section on training volunteers. Don't panic, however. If you are working with UMN Extension, they will help you with several aspects of your role. A detailed guide to visitation and discussion of how to train the volunteer visitors are detailed in that

chapter. We provide details here on only one aspect of your responsibilities—coordinating the practice visits. This is included in this chapter because each of the other coordinators will also visit businesses and should be aware of what it involves.

Practice business visits in the community

The local CBC leadership team should participate in two practice business visits prior to the volunteer visitor training. Participating in these practice visits will help the leadership team to answer questions volunteers may ask about businesses during their visitation training. These practice visits double as real visits. Thus, the concerns of the businesses should be addressed, and the completed interview guides should be copied and sent in with the others. Below are some tips on doing the practice visits:

- Choose any business but go to two different ones.

- **Participate! All members of the leadership team need to visit at least one business.**

It's important for all team members to participate in the volunteer training and practice visits, regardless of their past experience. Even those with a background in economic development may encounter new approaches or updated techniques by attending these training sessions. Attending the visits will help to ensure consistency across the team and can also establish a shared framework and approach. This common understanding will help to avoid confusion and establish a set of effective working norms and agreements amongst leadership.

- Send businesses a copy of the letter and the interview guide before the visits. Mail or even hand deliver the cover letter and interview guide to the business. Be sure that you have the most current interview guide before doing this.
- Handle immediate follow up from visits. The practice visits are the official visits to these businesses. The leadership team needs to handle the follow up in the same fashion as the task force would later. Every business is important!
- To provide feedback for the volunteer visitors, list your reactions to the practice visits on the worksheet in Appendix K, p. 91.

Business response coordinator

What do you need to be a good business response coordinator? People skills are important. Knowledge of local, regional or state/provincial resources to help business also can be an asset. If you become the business response coordinator, your job will be to organize immediate follow up to individual business concerns. The long-term success of a CBC project depends largely on the effectiveness of handling this follow up, because tangible early successes help keep the team energized for carrying out the long-range plans for community action. The individual business concerns are often called "red or green flag issues" because of their important or urgent nature. The role and responsibilities of the business response coordinator, leadership team, and task force to follow up on these immediate concerns are outlined in this section. Immediate follow up work can be very tedious and time-consuming if you tackle it

alone. The best follow up work is accomplished in a cooperative fashion. If you are the business response coordinator, you have the following responsibilities:

- Help other members of the leadership team.
- Visit businesses.
- Establish contacts with local and state organizations that can help local businesses.
- Prepare a localized fact sheet on development opportunities and resources.
- Organize the "red and green flag review of interview guides" by the task force.
- Mail thank you notes and the localized fact sheets to businesses after the visits.
- Assign a task force member to handle each immediate business concern.

What is needed for each of the above items? What follows is more detail.

Help other members of the leadership team

As a member of the leadership team, you must attend leadership team meetings regularly and familiarize yourself with the roles of other leadership team members. Naturally, as part of the leadership team, you also serve on the task force. This chapter will provide that information, so you can help others when they need it.

Visit businesses

All leadership team members visit between one to three businesses along with the volunteer visitors.

Contacts with state/provincial or federal organizations

Effective CBC visitation follow up often requires help from outside organizations, such as Minnesota's Department of Employment and Economic Development (DEED). It really helps if some project staff are familiar with the local CBC project. You can split up the names and ask task force members to contact the development program staff and briefly explain the local CBC process. Just how you split up the names is unimportant. Completing the calls is extremely important.

Localized fact sheets on available resources

Many CBC projects have prepared short (one page) fact sheets with the names and telephone numbers of organizations with applicable resources or programs. Some fact sheets also give a very short description of the project. Don't let this aspect become overwhelming so that nothing is available. UMN Extension can suggest state and federal programs that can meet some of the needs identified by individual businesses. In some regions/states, this information is provided in a format that volunteer visitors can use during business visits.

Mailing thank you notes and localized fact sheets

The need to mail thank you notes to businesses is obvious, and it provides an opportunity to send the factsheets to them. The visitation coordinator should be able to give you a list of names and addresses of businesses visited. It is best to do this mailing within one or two weeks of the business visits. This means the fact sheet must be prepared before the volunteer training.

Organizing "red and green flag" review of interview guides

After 10 to 15 surveys have been returned to the visitation coordinator, the entire task force should meet and review each of the surveys for red or green flags. A "red flag" is something that might limit the business or lead to it closing, downsizing, selling or leaving. A "green flag" is something that might lead to business expansion/investment in their location(s). As the business response coordinator, you will organize these meetings. The purpose of this review is to identify specific ways that the CBC project can provide assistance to each business and to assign the responsibility to one or more of the task force members for working with each business. Typically, it takes two, three, or more meetings to complete the survey review process, depending on the number of interviews completed.

If you want tangible results from your project, this is probably the most important step in the process. It is at this stage that you address the individual concerns of the businesses. Also, you will gain a much better understanding of your task force members and local government officials.

The process used for review is as follows:

1. The business response coordinator photocopies the surveys, but omits the cover sheets with the businesses' names and the first page(s), which includes the employment and products produced. **If this information is not removed, the review process violates the confidentiality promised to each**

of the businesses during the visits.

2. At the meeting, divide the task force into small groups of three each. Have each group review three surveys and be sure that each person in the group reads all three surveys. Next, have the small groups complete the "follow-up worksheets," which outline the nature of the problems, suggested follow up, and the resource person who might be able to handle this. An example of a "red flag and green follow-up worksheet" is included in Appendix A.

3. The next step is to reconvene the entire task force, and have the small groups report their suggestions to it. The task force then either accepts or modifies the ideas suggested for follow up.

The review process helps address the immediate concerns of local businesses, and it also helps task force members understand the long-term major concerns of businesses. These long-term concerns are addressed formally after the data are fully tabulated. By reviewing the individual surveys, the task force gains a stronger grasp of the nature of these concerns. This makes it easier for them to use the CBC research report of results later in the process (it is typically 80 pages or so for the UMN Extension CBC program). It also gives them time to think about various options for handling the problems that businesses mention.

In early programs, the business response coordinator summarized the surveys and then shared the summarized comments with task force members. You should avoid this. This approach is not as good as the direct

review. First, it takes more time for the coordinator to complete. Second, the coordinator could be blamed for a message that other members of the task force do not agree with. Third, task force members can claim that the message reflects the biases and interpretation of the coordinator. Fourth, understanding a response to a particular question often is easier if the reviewer can examine the entire interview guide.

Groups that have used the full survey review process have been very satisfied with it. A primary benefit is the complete ownership of the results of the survey by the task force. The task force also learns to work together.

Assign task force members or others to follow up

In some groups, the business response coordinator makes these decisions and asks people to respond. In other groups, the leadership team collectively decides. For accountability and clarity, the business response coordinator keeps track of who is doing what and holds them accountable to the extent possible.

Milestone meeting coordinator

If you become the milestone meeting coordinator, you will help the community organize itself to decide which long-range issues raised in the CBC interview guide can be changed by community action. You will help facilitate the process for the task force to make these priority decisions. Once these priorities are set, you will help facilitate accomplishing the goals. What does it take to be an effective milestone meeting coordinator? If you have some experience in planning large events, that can be helpful. It also is good if you can help groups of people come to a consensus

on what needs to be done. The specific things that need to be organized are as follows:

- Help other members of the task force.
- Visit businesses.
- Arrange (including written invitations) for the task force retreat.
- Arrange for the implementation resources meeting (optional).
- Arrange (including invitations) for the community commencement meeting.

Help other members of the leadership team

As a member of the leadership team, you must attend leadership team meetings regularly and familiarize yourself with the roles of other leadership team members. Naturally, as part of the leadership team, you also serve on the task force. Reading this chapter will provide that information, so you can help others when they need it.

Visit businesses

All leadership team members visit two businesses as part of the practice visits and often visit another one to three businesses during the visitation phase.

Arrange the task force retreat

One of the goals of the project is to develop a strategic action plan, which outlines the major strategies and projects that the community will use to encourage the survival and growth of their existing businesses. In the "red and green flag" stage, your task force looked at the problems and opportunities of individual businesses. Here, you are trying to set priorities for four to six major projects that can address the concerns of a large number of businesses.

Retreat agenda

This retreat meeting is held after tabulation of the survey results has been completed. Generally, the survey results are arranged into three or four common themes or strategies (e.g., concerns with workforce recruitment and quality, ways to remain cost competitive, community service issues). Discussion of each theme uses the following format:

1. Review the business survey results.
2. Small groups discuss potential projects to respond to business concerns.
3. Present suggested projects from the analyst/report writer.
4. Discuss suggestions offered by the analyst/report writer and small groups.
5. Nominate and discuss priority projects.
6. Vote for priority projects.
7. Select one to three people to head up projects.

This format provides an opportunity for the group to both learn about the research results and to discuss them in detail.

For each potential strategy, the analyst/report writer gives a short presentation of the research results which relate to that strategy, first describing the nature of the strategy. Then the task force will be split into small groups (three to five people each) to discuss the suggested projects and also to invent new ones. Then each small group will nominate one project for the final report. At this stage, all nominations will be recorded on flip charts, but no decisions will be made.

After all strategies are covered in this fashion, the group must decide whether to vote on their final choices at this meeting or

to wait until another meeting. There are advantages and disadvantages of either choice. Waiting gives you time to get more people on board, but it also can cause you to lose momentum. After some discussion, it's best to take a secret ballot on the approach to use. If the group decides to vote now, each person gets three sticky dots (little round self-adhesive dots available from office supply stores). Each person then chooses their top three priority projects by placing a dot next to them. The four to six projects with the greatest number of votes are adopted as priorities.

Who will take charge of each project?
In setting priorities for future projects, it is important to consider who will do the work. Research has shown that written plans from CBC projects that include not only those who helped develop the project but also **who will work on each specific project** are more likely to experience success. This is because people will agree that many things ought to be done, if someone else is willing to do it! An important ingredient to success is to choose only those projects that a critical mass of community leaders/members have agreed to help implement.

None of the priority projects will happen if someone from the CBC task force isn't able to provide leadership to make it happen. At least two or three people should be on a subcommittee to organize the project over

the next four to six months (or more). **An easy way to accomplish this is as follows: each task force member is given a sticky dot in a different color. They put their name on the dot and affix it to the priority project that they wish to assist in implementing.** The committee will often invite another three to six people from outside the CBC effort to help them, and that committee may invite others to become involved at some stage. It depends on the project. However, someone has to call the first meeting. You can't expect people who aren't at this retreat to do it. If no one from the task force agrees to call the first meeting, you might want to remove this as a priority item.

Many groups set the date for a task force meeting after the community commencement meeting as a time when these small groups will give a progress report and seek additional help from the task force.

It generally takes about four hours (plus any mealtime) to complete this task force retreat, if you do it in one meeting. See below for a suggested agenda. You may want to take extra copies of the section "Who will take charge of each project?" with you to the meeting. It's important that people take charge of the various projects that are adopted.

Suggested agenda for CBC task force retreat (relaxed 5-hour version)

9:30 a.m. .... Registration and coffee

10:00 .... Welcome task force and introduce program (coordinator)

10:15 .... Review of research results and presentation of strategy one (researcher)

10:30 .... In small groups, discuss suggested projects

10:45 .... Nominate projects related to this strategy

11:00 .... Review research results for strategy two (researcher)

11:15 .... Small group discussion of suggested projects

11:30 .... Nomination of projects related to this strategy

11:45 .... Lunch break

12:30 p.m. .... Review of research results for strategy three (researcher)

12:45 .... In small groups, discuss suggested projects

1:00 .... Nominate projects related to this strategy

1:30 .... Review research results for strategy four (researcher)

1:45 .... In small groups, discuss suggested projects

2:00 .... Nominate projects related to this strategy

2:15 .... Final discussion and voting

2:45 .... Set date for community commencement meeting

3:00 .... Adjourn

Good attendance at the retreat

CBC task forces don't generally have legislative authority or large budgets. Their power comes from the members of the task force, which includes people who have influence in many organizations that do have budgets and legal authority to impact economic development. Yet, this power can only be realized if the group reaches a consensus on what ought to be done in economic development. If the attendance at the retreat is low, it is not possible to credibly claim that the projects represent a consensus of influential community leaders and members.

One day retreat vs. series of short meetings

While it may seem efficient to split discussions into a few shorter meetings, experience shows this is not the case:

- Inconsistent attendance across meetings (often 30-50% change in the people participating) disrupts shared understanding.
- Weaker implementation when different participants have different interpretations of community concerns and leadership priorities.
- Scheduling issues can lead to delays, frustration, reduced

enthusiasm, and most importantly reduced attendance.

Ensuring a successful retreat with high attendance

1. Choose the date strategically
   a. Avoid major community or religious events.
   b. Involve the task force in selecting the date to increase ownership and effectiveness.
   c. Confirm that the CBC analysis and research report will be completed in advance
2. Send reminders
   a. Confirm in writing (email or letter).
   b. Send a follow-up message one week before the retreat.
   c. Send a text reminder and/or direct phone call two to three days beforehand. It will take effort but can significantly boost turnout.
3. Build momentum with regular meetings
   a. Hold monthly task force meetings between volunteer training and the retreat.
   b. Use these meetings to address "red and green flag" issues and share other local economic insights.
   c. Keep meetings purposeful, avoid having meetings just to meet.

Tips and cautions

Low survey response rates can lead to disengagement and feelings of guilt by those involved in the effort. While you want to put pressure on the task force and volunteers to accomplish their visits, don't overdo the pressure. If you get a low spirit

among the busy volunteers, this could inadvertently harm the rest of the CBC project. Also, do not list anyone as a contributor to developing recommendations and priority projects if they were not at the retreat.

What kinds of priority projects work?

As the person organizing the task force retreat, you may be asked, "What kinds of projects work?" What follows gives you some guidelines for answering the question. A 1993 survey of local BR&E visitation program leadership team members in four states asked for information on what projects had been adopted and about the overall impacts of the program. Using statistical tests on the survey results, Chris Allanach identified five broad types of projects that are strongly associated with positive program outcomes. Projects that are associated with strong programs are listed below:

Projects associated with successful local CBC projects:

- Inform politicians of business concerns
- Start a business/education partnership
- Create a group to work on local development issues
- Inform businesses about development programs
- Continue CBC project

It should be emphasized that the above list is not a recipe, only an indicator of what has tended to be successful for other communities. It is not necessarily the case that something that tends to work for other communities will work for your community. Each community has unique strengths and needs. It is the job of the task force to

consider the unique aspects of the community's situation together with the above information in developing an action plan. It also is quite likely that your community will develop strategies that do not fall under any of the broad categories listed above.

Note that the current authors would like to provide more current examples, which they intend to provide in a future edition of this CBC Handbook. Meanwhile, here are two sources of information on the effectiveness of the CBC method. They refer to the program with the previous names, the BRE visitation program, or the BR&E strategies program, but they are essentially referring to the CBC model of BRE.

1. This article talks about how the CBC program was improved at the University of Minnesota Extension: https://z.umn.edu/BRELessonsLearned.

2. Here are several case studies about successes stemming from CBC style projects across North America: https://z.umn.edu/BRE_CaseStudies

Arrange the implementation alignment meeting (optional)

Most CBC task forces don't have the time or resources to start from scratch, especially when other organizations in the community may already be addressing similar issues. However, just because there is an existing program doesn't mean it may fully meet the needs or issues identified as part of the CBC efforts. To avoid possible duplication of efforts and to encourage collaboration instead of "protecting turf," consider holding an **implementation alignment meeting** after the retreat.

At the end of your retreat, or if it occurs to them afterward:

- Ask task force members to identify organizations or leaders already working on priority projects.
- Invite representatives from those organizations to a follow-up meeting to share insights and explore alignment opportunities.
- Continue seeking new opportunities to build partnerships between attendees.

Set up a panel of these outside resource people for each of the priority projects and ask each person **ahead of time** to address the following three questions:

1. What is already being done on this project/topic?
2. To what extent are current programs reaching the businesses visited?
3. How could your organization and our group collaborate on expanding or starting this type of project to better reach our businesses?

Ask each group to prepare a brief (no more than four minutes for all three questions) summary on these questions. Each panel might be given about 20 minutes to address the above questions. If you have more than three or four priority projects, you might need to meet more than once.

Invite all your task force members to this meeting—use a telephone call or text tree to assign leadership team members to call and invite community members. Then follow this call with a written invitation.

At the end of the session, identify at least two task force members to be on the implementation team for each project. Note: hopefully you already identified task force members for each project team at the

retreat—and identify the organizations or groups that might wish to be on them also.

If you live in a small town, you might think that this idea will only work in more urbanized areas. Wrong! While you might not have a lot of organizations directly in your community, there are many organizations that have multi-county, regional areas for which they are responsible. It pays to identify these organizations and invite them to this meeting.

While this step slows you down in getting to the community commencement meeting where you announce your plans, it speeds up implementation and achievement of long-term goals.

Arrange the community commencement meeting

During the community commencement meeting, the survey findings and projects are presented. This meeting provides the opportunity for the community to recognize the "end" of Steps 1 – research and Step 2 – prioritize and the "beginning" of Step 3 – Implement the CBC project. This is where new economic development priority projects commence. Even though the visitation stage of your CBC project has concluded, you have just gathered a detailed database about your businesses and have just announced future priority projects for economic development. The community commencement meeting, therefore, should signify the *start* of local initiatives to improve your business climate, not the end of your business retention and expansion efforts. As such, this **commencement** meeting marks the success of the CBC business visitation, which made a very large effort. It's the beginning of the things-will-change phase.

Suggested agenda for the community commencement meeting

The suggested agenda described below seems most effective. It was developed after considerable trial and error, and it reflects the best elements of several CBC projects.

1. Introduce the program (coordinator - 10 minutes)
2. Review the program's purpose and history (leadership team - 5 minutes)
3. Give testimonials (business representatives) and/or program accomplishments (coordinator - 10 minutes)
4. Present strategy one* (task force member A - 10 minutes)
   a. Review concept of strategy
   b. Present highlights of survey results
   c. Summarize the task force priority projects
5. Present strategy two (task force member B - 10 minutes)
   a. Review concept of strategy
   b. Present highlights of survey results
   c. Summarize the task force priority projects
6. Present strategy three (task force member C - 10 minutes)
   a. Review concept of strategy
   b. Present highlights of survey results
   c. Summarize the task force priority projects
7. Closing remarks (overall or milestone meeting coordinator)

Strategy can be replaced by *priority project* if desired. Sometimes, even though there are several identified strategies in the CBC research report, the selected projects do not all align with those strategies. That's OK;

the local CBC task force is in charge and they should present their implementation projects in a way that works for them.

Method for presenting CBC strategies (or priority projects)

This is the most important part of the meeting—the main reason for it. The approach has been used in many, many CBC projects and has proven very successful and popular.

Select a different task force member (or leadership team member) to present each of the strategies/priority projects in your report. Have the task force member present (five to 10 minutes) the summary report, closely covering three topics:

a. The overall concept of the strategy
b. The survey results related to that strategy
c. The projects recommended by the task force related to that strategy

Prepare one to three slides on the above points. Be sure the text is large enough for everyone to see!

Make sure the individuals selected to present each strategy have good public speaking skills, and they are willing to report the projects selected by the group rather than their own personal agendas. It's a bonus if they are influential in the community. Now and then a person doing this gets original, giving his/her own personal recommendations rather than, or in addition to, those of the task force. This is to be discouraged, since it's confusing and distracting from the projects selected by consensus during the task force retreat.

By using this approach, you will demonstrate to the audience that the projects belong to the task force and not one individual or outside organization involved. In fact, the process of preparing and giving this presentation increases the capacity of local leaders to promote their projects. It is also an opportunity to recognize key community leaders and members in the program.

Improving community commencement attendance Some communities may not be able to follow all these suggestions because they may have fewer resources than others; nonetheless, the following are strongly recommended:

- **Organize and plan the commencement collectively**. The leadership team and task force members must decide *as a group* the specifics for the community commencement meeting (date, time, place, format, and audience).

- **Make the commencement meeting social**. Have the commencement meeting in the community at a place accessible for all. Send out invitations with RSVPs. Serve refreshments or a meal. Some groups have hosted dinners, but this is not essential. One community held their commencement on a river "sternwheeler" boat on the backwaters of the Mississippi River in Minnesota. While that was fun, it doesn't need to be that extravagant. Allow time for networking and socializing. Although it may seem that the social aspect of the occasion is being emphasized more than the content, it really isn't. It has been an observation that if you want good attendance and attentive guests, you need to make the meeting more than just a meeting to review results—you need to make it

a social event. Check with local community partners for opportunities to promote local businesses during this stage of the process.

- **Get media coverage**. Newspaper articles, radio spots, social media, and television coverage before the meeting will help increase your attendance because the media coverage gives the event more credibility and importance than it would receive otherwise. Media coverage after the event, however, is probably more likely since there will be more "news" to report. Encourage prior coverage by promoting the commencement meeting to community members in a timely manner.

- **Do not invite a guest speaker or include an unrelated controversial topic that will overshadow the purpose of the ceremony, which is reporting the project's findings.** One group invited a well-known U.S. senatorial candidate to speak at their ceremony as a means of drawing a crowd and media attention. They got a crowd, the media, and a campaign speech. Oh, yes, he did congratulate them on doing CBC, but no one heard about the results of the survey or their recommendations.

- **Hold a separate community commencement meeting just for the summary report of the CBC project, thereby emphasizing it—if this is not practical, it may work to hold the CBC presentation in conjunction with another organization's meeting**. This arrangement guarantees an audience, but it may also present some difficulties because of time

limits for guest speakers, other items on the agenda, or attendance restrictions. Therefore, it is important to obtain adequate time for the CBC presentation (about an hour) and to make certain that the meeting will be open to all interested persons. If these two adjustments cannot be made, don't hold it with another group.

- **Even though the businesses will receive an invitation, have the volunteers call the businesses they visited to make a more personalized invitation**. This adds a personal touch to the meeting and increases attendance.

- **Do not present the findings and recommendations prematurely**. It takes at least one month, and sometimes more, between the task force retreat and the community commencement meeting to finalize and print the summary with the recommendations. During this month, some communities have wanted to simply share the findings and recommendations before the reports are ready. This approach weakens the purpose of the community meeting.

If guests attend a similar presentation but do not receive a report, most of the information they hear will not be retained, and their enthusiasm for the projects recommended will wane. Providing them with a summary during the ceremony will convey the message of community development more effectively.

Communications coordinator

What is needed to be a good communications coordinator? If you have

good people skills, you can do this job. You don't need to be a good writer, work for a news organization, or have thousands of social media followers if you can explain the CBC project enthusiastically and communicate effectively with the community. To be effective, the communications coordinator must be a full participant in leadership team activities so media coverage accurately reflects the program's progress. News media coverage is often most effective if you and other members of the task force take time to establish personal relationships with the news organizations that are targeted to provide coverage of the local CBC events. Inviting news organizations to participate in the various events can help you get more effective coverage than "after the fact" notification. That is, if you have local news media outlets in your community. Local news media is a diminished landscape, especially in traditional print media, from the 1990s when the CBC program was first being done. And now there is social media as well. If you are the communications coordinator, you have the following responsibilities:

- Help other members of the leadership team.
- Visit businesses.
- Clearly communicate with the community.
- Provide copy to news media.

What is needed for each of the above items? What follows is more detail.

Help other members of the leadership team

As a member of the leadership team, you must attend leadership team meetings regularly and familiarize yourself with the roles of other leadership team members.

This chapter will provide that information, so you can help others when they need it. Naturally, each coordinator also serves on the task force.

Visit businesses

All coordinators do at least two practice visits and usually do two or three additional business visits during the visitation stage.

Clearly communicate with the community

Develop social media and other digital communication strategies with clear goals and a timeline. Consider using traditional media methods as well, such as local newspaper, radio coverage, cable access TV, and partnering with other organizations to more broadly spread the news. Examples that might be used are included in Appendix L.

It is important to maintain a clear and effective communication strategy. This means providing updates and news on the progress of the project to the community at key points, such as announcing the start of the project, recruiting volunteers, visiting businesses, announcement of commencement meeting, updates on key findings, and release of deliverables, as applicable. It is important to use the strategy that works best for you and your community and consider all stakeholders' communication styles.

If applicable, the communications coordinator makes personal contacts with the local news media to explain the project. Or, as with other coordinators, they might arrange for someone else to make these contacts. In either case, the media is kept up to date on the progress of the program and invited to attend any local CBC events. Often the communications coordinator

arranges media interviews for the rest of the leadership team.

Provide copy to media and leads to radio and TV

There are at least eight stages in the CBC process when the media might be interested in the program.

At these stages, news releases can be written. If you wish, you can prepare your own news release. Examples of press releases the media coordinator might prepare and distribute are included in Appendix L. Newspaper coverage is not the only source of publicity. Radio interviews, television coverage, newsletters, and information bulletins also are excellent methods of informing the community and state about your community's work with local businesses and efforts to promote economic development.

Overall coordinator

Selection of overall coordinator

The overall coordinator is elected by the other four coordinators at the end of the orientation program. In many cases, the overall coordinator also will serve as one of the other coordinators. However, in some projects, the coordinators will wish to invite another person for this role.

Help other members of the leadership team

As a member of the leadership team, you must attend leadership team meetings regularly and familiarize yourself with the roles of other leadership team members. This chapter will provide that information so you can help others when they need it. Naturally, each coordinator also serves on the task force.

Visit businesses

As a member of the leadership team, you also go on practice visits, as well as visit businesses after the volunteer training.

Convene leadership team meetings

This person is responsible for convening the leadership team for their meetings and for announcing the task force meetings.

Spokesperson for the leadership team

The overall coordinator sometimes serves as the project spokesman and often is the primary contact for engagement with UMN Extension or other outside organizations involved.

Tips on getting projects implemented

What is the point of doing all this work and setting priorities on projects to improve the local business climate if few of them are implemented? If this happened, it would have been better to have gone fishing or something else enjoyable. This isn't to say that every project must be fully implemented for a CBC project to be successful. Many very successful people (and programs) set goals that are very high. Yet, if few or none of the projects are implemented, then clearly the CBC project is not a success. Here are some tips from both experience and a research project on how to ensure greater success in implementation.

Follow sound strategic planning processes
A study of 91 CBC projects in four states found that those projects that used basic strategic planning guidelines had more success in their implementation than those that did not. If your project follows the approaches outlined in this handbook, your

Plan each quarterly meeting well.
Community leaders don't need more useless meetings. If the first one is poorly planned, it will hurt attendance at the rest. If it is well done and the committees have been given enough notice so they are prepared, enthusiasm and results will follow.

Contact committee between quarterly meetings of task force.
If the committees don't meet periodically between the quarterly meetings, little will happen at these quarterly meetings. Often the lack of progress between meetings results in the group feeling powerless to change things and attendance will drop off, but who will make the contacts between meetings? The leadership team.

Elect a new leadership team at the first quarterly meeting.
While you and the others on the leadership team might wish to continue in this role for three years, you also might not. It is suggested that only half of the leadership team be replaced at the first quarterly meeting (i.e., add two new members). It is better not to shift the entire team since this will lead to problems in continuity.

Keep in touch with your CBC consultant and/or state/provincial agency.
As your implementation plans go forward, you will likely come across some unexpected hurdles. Use your CBC consultant and/or state/provincial agency (e.g., UMN Extension for Minnesotans) as a kind of help line to identify other groups in the state that have successfully overcome similar problems. **When in doubt, however, convene the task force because encouragement from fellow team members, and their wisdom, goes a long way in sustaining creative energy.**

Invite regional and state organizations to your quarterly meetings.
Communities with strong track records in economic development engage and take advantage of the various resources available through local, state, and federal organizations and programs. Consider possibly inviting representatives from these different organizations to your quarterly meetings to learn about CBC project priorities and identify ways to potentially collaborate on these projects. Ask them to share one or two of their current programs to discover possible connections to your projects or other ways to potentially partner in the future.

Distribute one-page outline of projects often.
Minnesota CBC projects with UMN Extension have an 80-page research report and a 10–12-page summary. Few people read either of these often. Some of the most effective projects condense it to a one pager that outlines the priority projects and people on the committees. This one-page summary can be distributed early and often. It serves both as a reminder of the projects and who to contact if you can help or have an idea.

Keep publicizing your project.
As you implement a project, let the world know about it. This rewards the volunteers who put in time and often helps establish your community as a place "on the go."

Summary of volunteer roles

Leadership team and task force

The leadership team is the executive committee of the task force and provides overall leadership to the initiative. The task force is the broad-based group of community members that collaborate through Step 1 Research, Step 2 Prioritize, and Step 3 Implement the Connecting Businesses and Community program.

All leadership team members are expected to help other members of the leadership team and visit businesses.

Visitation coordinator (leadership team)

- Useful skills: organized, works well with others
- Identify and recruit task force
- Identify businesses to be visited
- Coordinate practice visits and visitor training
- Mail completed surveys to report writer, keep copies in secure file
- Time required averages 45 hours during research and prioritize steps. Varies in implement step. *

Milestone meeting coordinator (leadership team)

- Useful skills: large meeting planning, consensus building
- Arrange (including invitations) the task force retreat
- Arrange (including invitations) the community commencement meeting
- Time required averages 45 hours during the research and prioritize steps. Varies in implement step. *

Business response coordinator (AKA "red/green flag" coordinator) (leadership team)

- Useful skills: people skills, organized, persistent, familiar with state/regional/local ED resources
- Establish contacts with local, state, or federal agencies that can help local businesses
- Prepare localized resource guide on development programs
- Mail thank you notes and localized resource guide to businesses after the visits
- Organize the red and green flag review of surveys by the task force
- Assign a reliable task force member or resource person to handle each immediate business concern
- Time required 45 hours during research and prioritize steps. Varies in implement step. *

Communications coordinator (leadership team)

- Useful skills: enthusiastic, people skills, familiar with social media and traditional media

- Establish contacts with the media
- Provide copy, photos, video to media
- Time required averages 45 hours during research and prioritize steps. Varies in implement step. *

Overall coordinator (sometimes serves as one of the above) (leadership team)

- Useful skills: convening and leading a team, willing to be the spokesperson
- Coordinate/chair leadership team
- Inspire/motivate others to make the initiative a success
- Time required averages 45 hours during the research and prioritize steps. Varies in implement step. *

Task force members

- Useful skills: people skills, understanding of local economy. Need at least some members of task force who are recognized community leaders.**
- The task force sets the overall policies for the program throughout
- Visit businesses
- Recruits volunteer business visitors to help do the business visits
- Participate in task force meetings
- Get involved in follow-up activities based on their interests and skills
- Contribute their credibility and enthusiasm; take away knowledge and sense of accomplishment
- Time required averages 20 hours during research and prioritize steps. Varies in implement step. *

Volunteer visitors

Additional volunteer visitors are crucial to the success of the Connecting Businesses and Community Program. Useful skills: willing to learn, organized, persistent.**

- Attend an orientation session or business visitation techniques
- Team with a partner to visit two or more businesses assigned by the visitation coordinator
  - Demonstrate the community's appreciation to the business owner
  - Make a good impression by carefully listening and following the interview guidelines
  - Collect quality data to contribute to a quality research report
- Be persistent in getting business interviews scheduled (even if it takes multiple attempts)
- Get completed surveys back to the appropriate official on a timely basis
- Possibly get involved with the task force
- An average volunteer visitor might spend a total of six hours or so on two visits, plus training other people needed: business owners (1 to 1.5 hours each)

*These time estimates stem from research on business retention and expansion (BRE) in the 1990s. Your experience will vary based on goals and the particulars in your community's situation. Each of the roles is described fully in program materials available from Extension. **Ideally, the task force and volunteer visitors include representatives from both the private and public sectors, government, business, nonprofit and other groups to be a broad community enterprise.

Chapter Four

Setting up the business visitation

Introduction

If you are the visitation coordinator for a local CBC project, this chapter was written especially for you. This chapter will help you organize the business visits, show you how to select businesses, provide tips on training volunteer visitors, and instruct you on how to notify businesses that they will be receiving a visit.[1]

Visitation coordinator as quarterback

Recall the discussion of the coordinators being quarterbacks of the leadership team and not the full team. If any of the coordinators need to operate as a quarterback and not the entire team, it is you—the visitation coordinator. You should look at your team as including both the leadership team and the full task force. The rest of your leadership team will become backup quarterbacks in helping you tap into the rest of the group.

Details on visitation coordinator's role

As the visitation coordinator, you have the following roles and responsibilities:

1. Help other members of the leadership team.
2. Visit businesses.
3. Identify a researcher to analyze the survey results.*
4. Select a CBC survey.*
5. Identify and recruit task force members.
6. Identify businesses to be visited.*
7. Coordinate the two "practice visits." *

8. Coordinate volunteer visitor training.*
9. Mail copies of the survey to the researcher.

* UMN Extension will provide major assistance during these steps of the process.

Help other members of the leadership team

While the day will come for helping them on their tasks, generally, they will be helping you. If you want a successful project, you will use them. Naturally, as part of the leadership team, you also serve on the task force.

Visit businesses

Everybody in the project visits businesses. As visitation coordinator, you will do two "practice visits" before the volunteer visitor training. You might wish to visit a couple of additional businesses also, but it is best to save some time for visiting businesses that other volunteers find they cannot make.

Identify a researcher to analyze results

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

Select a CBC survey

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

An interview guide (survey) is a must

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

Pros and cons of developing your own survey

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

We recommend that you don't develop a new survey

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

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

Where can we get examples of good surveys?

You can find names and addresses of consultants throughout the nation by connecting with the Business Retention and Expansion International website: http://www.brei.org

Identify and recruit task force

The entire leadership team decides who will be on the task force. Participants should cover a wide range of community leaders and members as shown in Chapter 1: Eligibility for task force section of this handbook. Once the group has been identified, each member of the leadership team needs to personally contact five or six prospects for the task force.

Often individuals are invited to the first task force meeting without any obligation until after the meeting. The meeting can be used to introduce the project and to answer the questions of potential task force members.

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

A key step here is to get a complete list of names, mailing addresses or email addresses, and phone numbers of those that agree to be on the task force. It is best to put the addresses on mailing labels or a

computer program (possibly a CRM or contact database) for repeat use.

After the full task force has been identified and personally contacted, a letter should be sent to them inviting them to a meeting at which the project is explained. Show the 19-minute version of the 3-community example video as an introduction.

Task force recruits the volunteer visitors

Your job is to help them understand the number of visitors needed. (For example, for 50 visits, you need 33 visitors if each team goes on three visits, and 50 visitors if each team goes on two visits.)

See Chapter 1, p. 15 for reasons volunteers participate in the project and benefits to them.

Identify businesses to be visited

Obtaining a reasonably complete list of businesses in your community is the first step in the selection process. Most people in smaller communities are surprised at how many businesses are located within the community. They tend to forget about some of the smaller businesses. A few potential resources for developing your business list include:

- Your state's department of commerce or development (licensed businesses)
- Chamber of commerce membership
- Commercial business directory, such as Data Axle or Dun and Bradstreet
- Secondary data sources online, such as ESRI

Whichever source you consult, it will likely be incomplete and slightly out of date. You will need to verify and supplement any list that you use to start your database of local business addresses. Try to distinguish between manufacturing, retail, and service industries when you are establishing your list.

Past research has shown that communities with more successful programs focus on one type of business at a time, such as retail, agriculture, or manufacturing.

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

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

Number of businesses to visit

How many businesses should you visit? Probably between 30 and 60. If you visit less than 30, your future projects are based on a very small sample and the "signal to

noise" ratio may be too low. If you try to visit over 60, your group may burn out on the visits and not have time to respond to the businesses' needs.

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

Statistical note

The CBC program is neither designed nor scaled to provide inferences on the general population of businesses in the community. That's because you generally cannot get to statistical significance with CBC's method of in-person interviews with business owners/managers. To project findings of a survey to the general population, it generally is required to collect hundreds of observations (200 or more completed surveys, depending on the size and the characteristics of the population). And it requires scientific random sampling. Instead, the CBC program approach focuses on practical sampling that encourages the community to understand and respond to the needs of the businesses that are visited. You will know what the visited businesses think and this will give at least some clues as to what other businesses think.

Coordinate the practice visits to two businesses

This is described in detail in Chapter 3: Practice business visits in the community (pp. 36-37). Be sure that all leadership team members read it.

Coordinate volunteer visitor training

To prepare for the volunteer visitor training session, a considerable amount of advance preparation is essential to ensure the success of community members involved in the project. If you are working with UMN Extension, they will conduct this training for you and help in coordinating the training. It is outlined next.

Prepare prior to volunteer training

The following steps need to be taken by the leadership team, **before the volunteer visitor training sessions**:

- Send the task force and volunteer visitors a reminder letter about the training session; see Appendix F: Sample letter for recruiting volunteers (p. 81).
- Prior to the business visits, send a letter (Appendix G: Sample letter to business, p. 82) and a copy of the survey to the businesses.
- Arrange for an experienced CBC leader to be available (in person or virtually).
- Have the communications coordinator write several early news releases about the program.
- Match the visitors into teams but do not assign the teams to business visits. Experience has shown that it's best to let the visitors select the businesses they want to visit.
- Prepare individualized packets for each person.
- Ensure proper equipment for the session is available.
- Work on the agenda and assign tasks as a team (Remember, you are the coach, not the entire team!).

Prepare individual volunteer packets

You must prepare an individual visitation packet for each volunteer. Be sure to include the following items:

- Interview guides (one for each business being visited, plus a few extras).
- Pre-addressed stamped envelopes (enough for one per survey).
- A copy of the letter sent to businesses.
- A list of selected businesses, complete with the names, addresses and phone numbers of the person to be interviewed.
- A list of the volunteer visitor teams, or at least the volunteer visitors, if visits are not assigned before the training sessions.
- Scheduling postcard addressed to the visitation coordinator.
- "Guidelines for volunteer visitors" instructions (see Appendix H: Guidelines for volunteer visitors, p. 83).

Rationale for volunteer packet contents

It's handy to have extra interview guides in the packets in the event the contact person at the business has lost their copy.

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

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

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

It is very important that businesses be contacted soon after they receive the letter. Otherwise, they will forget about it, assume that the project is disorganized, or that the volunteers don't really care about their business. Because of this, some visitation coordinators use a scheduling postcard to track whether the volunteers are moving ahead. A sample copy is shown below. If the card is not returned within 10 days, the visitation coordinator calls to nudge the volunteers or to see if something has come up that requires a reassignment of the visit.

To: Sam Smith, CBC visitation coordinator Re: CBC visitation visits

Our team has planned to visit the following businesses on the following dates:

Business names   Visitation dates

1._____   _____

2._____   _____

3._____   _____

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

Team member names:_____

We have found that <u>few</u> volunteer visitors drop out of the project after they attend the volunteer training session. Since some of your volunteers will be unable to attend the session (illness, conflict in meetings, etc.), you should recruit about 10% more volunteers than you need.

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

Some CBC projects in recent years have used email, Google forms (online surveys), Google sheets or docs, or other electronic tools, etc., to manage the notifications, scheduling, and monitoring of business visitations. We encourage you to use the channels that work for you and your volunteers. We know that the U.S. Postal Service is still a solid option, and computer-based methods can be more vulnerable to user error (e.g., emails being off by one character can keep messages from getting through). Postal carriers are usually more forgiving of sender error. However, no system is foolproof. It may be that your best bet is to plan on using more than one communications channel, especially when you find out that your volunteers like certain channels more than others.

Create volunteer teams

Generally, the easiest way to pair visitor teams is to ask the task force members to recruit a person to go with them. You might encourage them not to pick a person from their company or organization. It is better if public employees go with private sector businesspersons and vice versa. It not only builds understanding between the visitors but suggests better collaboration to the businesses.

This combination gives the business manager or owner the impression that the project is indeed community-wide, adding credibility to your effort. Also, the private sector volunteer may be more sympathetic to business owner opinions or concerns than the public official. Additionally, the public official may have more knowledge of local organizations and state programs that can address the businesses' concerns.

Match businesses and visitation teams

If you have access to experienced economic development professionals as part of your visitation teams, we suggest that you match them with some of the larger businesses, since this is their area of expertise. The rest of the group can be matched during volunteer training. One method frequently used is to prepare a list (in large letters) of the names of the businesses and post it on the wall. During a 10-minute break after the first hour, ask each visitation team to sign up to visit two to four businesses. If they have a list of all the businesses in their packets, they can scan through it and decide very quickly the businesses they would like to visit. A similar methodology can be used digitally using Google Sheets.

Mail letters to businesses

A few days before the training sessions, mail letters with interview guides to all of the businesses you have selected. The timing of this step is crucial to the success of your project. Sending these letters and interview guides to the businesses just before the training sessions allows volunteers to schedule their visits immediately. Having received a letter, the businesses will be expecting the volunteers' calls. The longer

the delay between the business letters, the training sessions, and the volunteers' calls, the lower the participation rate of the businesses, the lower the volunteers' enthusiasm, and the weaker your project. **We cannot emphasize enough the importance of sending your letters with interview guides to the businesses a few days before the volunteer training.** A sample letter asking the business to participate is provided in (Appendix G: Sample letter to business, p. 82).

Mail surveys to analyst/report writer – but keep quality copies

Ever lost anything in the mail? Or had someone claim that a package never got to them when it's probably lost in their office? What if this happened with some of your business interview guides and you had not copied them before mailing? What would you tell the businesses, the volunteers, and the task force? **ALWAYS run a photocopy of the complete survey before mailing it to the researcher**. Besides, your project will also need it for the red and green flag review meetings.

Volunteer visitor training program agenda

As visitation coordinator, you are responsible for making sure the volunteer visitor training is done well. You help the leadership team organize this training. (But remember, you are the quarterback—not the whole team.)

Importance of volunteer training

If you want a successful CBC project, you must have well-trained volunteer visitors and a high completion rate for the business

interviews. A high completion rate demonstrates to businesses that your community really cares, and it also provides validation that the CBC is taking a high-quality approach. For these outcomes to occur the volunteers need to feel comfortable and confident in their assignments. The training workshop is aimed at helping the volunteers be well enough prepared so that they have fun on the visits and collect solid information on the businesses' concerns. We will now discuss these training sessions in further detail. The premise in this agenda design is to address the "why and what" in the first hour and the "how, who, and when" in the second hour.

A typical training session agenda (total time: roughly 2 hours)

First hour: Introducing the CBC project

Self-introductions by participants ....5 min.

Introduce project ....10 min.

Show 3-community video about CBC...20 min.

(or the 5-minute clip)

Facilitate small group discussion...5 min.

Facilitate question and answer period ....<u>10 min.</u>

 ....50 min.

Break for coffee..10 min.

Second hour: Preparation for business visits

Distribute visitor packets ....5 min.

Review visitor packets..5 min.

Show video on interview role playing ....20 min.

Discuss interview methods...10 min.

Teams select businesses to visit ....15 min.

Discuss deadline for visits...<u>5 min.</u>

 ....60 min.

First hour: Introduce the CBC project

The visitation coordinator starts the session by briefly describing the objectives of the CBC project and the importance of the volunteers to the project. Then key leaders (the leadership team, CBC consultant, and task force members) also are introduced. Allow some time for the rest of the attendees to give a brief introduction (name, city, business and/or public office).

Say why the project is being done, talk about your impressions of the practice visits, and answer any questions about your project goals.

Then show the 3-community example video segment (~20 minutes) See Chapter 5, p. 66 for tips on using this effectively. If you have an outside guest at the session, then you could choose to play the abbreviated six-minute version of the video.

Following the video, a Q&A period can be held with an experienced CBC coordinator from another community. This discussion is very valuable during the training, as it allows the volunteers an opportunity to ask questions about the project. If someone with CBC leadership experience is in attendance, this is a time for them to help address any further concerns or questions.

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

After the training, some community members sometimes comment that they wish the Q&A period with the experienced CBC leader had come after hour two of the training when they have additional questions. We discourage you from making this shift for two reasons. First, unless you deal with questions about the general goals and procedures of the project before you go over the interviewing details, you will get those questions then. This bogs down the discussion and the tone could turn defensive. This hurts the volunteers' understanding and results in poorer quality of data and a lower response rate. While you might be able to counter it immediately, often that is not possible without setting off a debate between the two "experts." Second, if the experienced CBC leader is attending the workshop during hour one,

this gives you time to counter any "bad" advice before the end of the workshop.

Second hour: prepare for business visits

After the break, distribute the volunteer packets. It pays to spend five minutes going over their contents. Pay special attention to the "Guidelines for business visitors," Appendix H of this handbook. It outlines the specific steps and approaches each team is to take. Then have the volunteers view the role-playing section of the video that accompanies this series to demonstrate these guidelines or develop your own role playing exercises with the questionnaire provided in this handbook. As a final item, be sure to stress to the volunteers the procedure for submitting the completed interview guides (aka questionnaires) when they are due.

Keep volunteers motivated

Get high attendance at volunteer training sessions

If you get low attendance at the volunteer training, the quality of the project will suffer. There are several steps that the leadership team can take to ensure high attendance. Some successful techniques used by other communities included:

- Using lots of media coverage of the CBC project prior to holding the volunteer training.
- Sending personal letters to the task force and volunteer visitors.
- Holding at least two training sessions to make it easier for volunteers to attend.
- Scheduling the meetings from 7:00-9:00 a.m. and 4:00- 6:00 p.m.

Implementing a telephone calling tree on the day of the workshop (leadership team calls task force members, who call volunteers). Note that texting, emailing, or other ways of doing the reminders may be used. As previously noted, it may be useful to use a couple methods.

Importance of high completion rates

In the early years (i.e., the 1990s), CBC projects that have used this approach enjoyed average completion rates of 85%. In more recent decades, the experience has been typically in the 60 - 85% range. This is very high compared to most survey efforts. For the business owners who did not complete the interviews, it tends to be a split between refusals by the businesses and volunteers being tardy and disorganized.

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

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

If there appear to be response problems, the leadership team needs to look into the reasons why immediately. They should seek support from CBC experts to discuss these challenges.

Encourage high business participation rates

Here are the steps you can follow to get high business interview participation rates!

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

Chapter Five

Using videos to introduce the CBC program and train volunteers

Introduction

The material covered in this chapter provides pointers for effective use of the videos that accompany these materials. There are two video topics: 1) an overview of the CBC program approach featuring three Minnesota communities and 2) tips and role play about successful business interviews. After an overview of each of these videos, this chapter suggests when to use each video. Then there are tips on how to use each video most effectively and supplemental materials to use with small groups watching the videos. These videos and a few others can be found at z.umn.edu/BREvideos, a YouTube channel hosted by UMN Extension.

Overview of two CBC videos

Video 1: 3-community example of CBC

This video resource (created in 2009) is an educational documentary about three CBC projects in Minnesota: Faribault in Greater Minnesota (2002), Blaine in the Minneapolis suburbs (2003), and several ethnic chambers of commerce collaborating on a joint CBC (2009). Faribault visited a mixed sample of 91 businesses and had a BREI award-winning project. Blaine interviewed 50 manufacturers that led to interesting priority projects in its implementation phase. The Ethnic Chambers CBC visited about 61 of their business members throughout the Minneapolis-St. Paul region. This video outlines the major steps in the CBC

process, the role of local leaders, the importance of the research component, and the outcomes of their strategic action planning efforts. Local leaders from each of the three CBC projects tell the story of how their project developed.

Both Faribault and Blaine had completed the three steps of their CBC timelines when the video was made. Ethnic Chambers was in Step 2 and anticipating implementation. Note that these communities described their projects as BRE strategies programs, which was the program name that the University of Minnesota used before renaming it to the Connecting Businesses and Community (CBC) program. The 19-minute video is the recommended version. However, the five-minute version will do when you are trying to squeeze things into a training agenda.

Video 2: Tips for successful CBC business visits

The full 18-minute segment (created in 2021) outlines tips for doing the business visits, as well as a role-play skit with some UMN Extension BRE actors. A good CBC project plan requires both high participation rates and high-quality data from each of the businesses visited. When the volunteer visitors are comfortable with their roles and have fun on the visits, the participation rates are high. In CBC projects using this approach, the average completion rate is 60-85%. Volunteer visitors must follow guidelines to ensure consistency among all the business visits and to ensure that the data reflects the opinions of the businesses

visited—not those of the visitors. This video shows volunteer visitors how to have fun on business visits and how to get high-quality data. After an initial review of guidelines, three individuals role play an abbreviated visit (two role-play as volunteer visitors and one role-plays a business owner). The role play differs from a typical visit in two ways. First, the role-playing segment runs only 10 minutes while a typical visit is usually about an hour to 1.5 hours (depending on the interview guide and context).

Second, the video focuses on points where volunteer visitors might make mistakes—in fact, a few mistakes are made intentionally to aid discussion and learning. As you watch the video, look for these mistakes and discuss them after the video. Handout "Notes to accompany volunteer visitor role play" in Appendix I (see p. 85) allows viewers to take notes on the role-playing video.

Note that there are three available configurations of this video:

1. The full tips plus role play (18 minutes)
2. The role play with an abbreviated set of tips (11 minutes)
3. The full tips without the role play (8 minutes)

Tips for using video 1: 3-community example of CBC (Faribault, Blaine, Ethnic Chambers Communities)

Video recordings are like books, fact sheets, slide sets, or other teaching aids. They can help a group understand the program, but they are not sufficient to do the job all by themselves. After all, every group has

unique concerns and questions that need to be addressed. Here are a few tips on using the first video more effectively.

Why show the 3-community video?

There are four reasons for showing this video. If you use this video, the video will:

1. Demonstrate that the program has been done by people like the viewers.
2. Show the importance of involving people from a wide variety of organizations (private businesses, city government, county government, regional development organizations, economic development professionals, Extension educators, and individual community members).
3. Give a picture of both the organization and their CBC goals.
4. Provide testimonials as to the project's effectiveness. The leadership team can say these things, but the message is much more effective if given by third parties in the video.

Introducing the 3-community video

Three points must be covered to introduce the 3-community video effectively:

1. Has your community done a BRE visitation before? If so, when and how?
2. Is your community similar or dissimilar to the 3-community examples?
3. Identify the key points the group should look for in the video.

Communities with prior BRE visitation projects

If your community completed a BRE visitation project before, some people might be skeptical of redoing it. If the earlier project was identical to this one and done recently, they would be right! But was it the same?

The self-assessment guide found in Appendix A (see p. 70) can help your local group decide whether or not prior BRE visitation projects were the same as this one. In most cases, earlier projects were probably much different than this one. After this 10-minute exercise, your community leaders and members will realize the differences and be more likely to watch the video carefully.

Areas dissimilar to the Faribault, Blaine, or Ethnic Chamber examples

We consider the 3-community video as representative of much of Minnesota and the different scopes that a CBC project can take. However, if your area seems different than the 3-community examples, or you're not in Minnesota, there are a couple options:

First, see if your state or province has a video or other resource that covers the basic structure of a CBC project. Second, consider doing what North Dakota did when they first started their program. They used Ohio's video. When they introduced it, they would say, "This video is for Ohio, which of course, is much different than North Dakota. Much of this video probably fits our situation, while some of it probably doesn't. Rather than spending $20,000 to develop our own video, we decided to use this and then after we watch it, we can talk about what parts fit and what parts don't."

The 3-community video cost the University of Minnesota Extension $25,000 (2009) and lots of effort, so we're going to use it for a few more years. Feel free to use it wherever you are and just stress that it's Minnesota folks.

Suggest key issues in video

The adage, "Tell them what you are going to tell them, tell them, and then tell them what you told them" fits here. Ask the viewers to look for the answers to the following questions as they watch the video:

- Does the project focus on concerns of the area's existing businesses?
- Is the project action-oriented?
- Are local leaders from business, education, local government, and economic or workforce development agencies actively involved as task force members and visitation volunteers?
- Are the interview results analyzed by an independent outside researcher?
- Do local leaders make all the decisions on priority projects after the visitation and analysis is complete?
- Is implementation of the business interview findings a key part of the process?

Does your equipment work?

Test your equipment before the meeting!! Testing the equipment will help you identify any bugs, make sure the video is properly cued to the right segment, and avoid potential embarrassment if you aren't familiar with the equipment.

Use small groups to generate questions

After showing the video, break into small groups of three to four people. Ask each group to take time to prepare three or four questions on the CBC project. Point out that any question on the CBC project is okay.

If you skip this small group discussion step, your group's questions will not be as penetrating, tough, or as beneficial to the task force. Consequently, your group won't learn as much about the project and whether it fits your community. This means you are less likely to successfully sell the project. And if the group's questions result in them deciding the project doesn't fit, it's better for everyone to decide this now, rather than after you have put more resources into the project. This step might be even more important for Minnesota audiences, where "Minnesota Nice" can be an issue (ask a Minnesotan if you need a perspective on that).

Allow about five to eight minutes for small group discussion. It will go faster if you designate who is in each small group.

Question and answer session with experienced local leader

For the Q&A session, have your group interview an experienced leader from a community that has already participated in a CBC project. This will make the responses much more tangible than if you or a project sponsor answers these. Encourage each group to ask questions. No questions related to the CBC project should be out of bounds. To give every group a chance to participate, the moderator should solicit one question per group until all groups have been able to ask a question. Repeat this procedure as long as time permits.

If you're outside Minnesota, you might wonder how to find an experienced CBC leader. Potentially, you may be able to find someone from the Business Retention and Expansion International website at: (http://www.brei.org).

Tips for finding an experienced CBC leader

What follows are some answers to commonly asked questions about finding a resource person to help you introduce the program to your community.

Question: If we have a CBC project that we're launching, what type of outside guest should we select to speak?

Answer: If your group is primarily businesspeople, select a businessperson. If they are farmers, select a farmer. Groups prefer to talk directly to their peers. Avoid Extension educators or state agency personnel that work directly with the CBC program. They are expected to be enthusiastic about the project and thus are not as credible as someone who is a peer of the audience.

Question: If the resource person must travel a long way, and we can't afford to cover his/her travel; is there another option?

Answer: You bet. Even before the COVID-19 pandemic, many groups have used various virtual methods successfully for the Q&A session. Through virtual participation, the experienced CBC visitation leader can be heard and seen by the entire group with proper technology.

Question: How will you know if the outside speaker will do a good job?

Answer: Only by calling the person in advance and asking lots of questions yourself. If the person does a good job, then

invite that person to be interviewed by your group.

Question: Would you use the above approach (introduction, show video, small groups, and virtual Q&A) all four times (i.e., general awareness, leadership team orientation, first task force meeting, and training volunteer visitors) when the 3-community video is used?

Answer: You bet!!! We have used it in all four cases. People have questions in all of these situations. If you don't encourage them to ask their questions in the meeting, they will ask them later when no one with direct experience is available to answer them.

Video 2: tips for successful CBC business visits

This video is used only for training the leadership team for its practice visits, and during volunteer visitor training. This video has a more specific job, so it doesn't require as much introduction as video 1 with the 3-community CBC example. Consequently, we suggest the following:

Introduce the video

Introduce video 2 and emphasize the following:

- The reason for visiting businesses is to obtain their opinions.
- Obtaining high quality information is critical for helping businesses.
- Visiting businesses is fun.

Obtain business opinions

The reason for doing a CBC visitation project is to build an awareness of local business problems to help businesses address problems and help communities retain and expand their existing businesses.

Consequently, it's important to obtain managers' and owners' opinions on the local business climate. Volunteer visitors must not influence those opinions while gathering data during the business visits.

High quality data

Stress the importance of obtaining high quality data for the development of a good action plan. If there are a lot of missing items, or if the note taker writes sloppily or doesn't provide a clear description of the problems, your local task force won't be able to respond as well to the needs of the businesses visited.

Visits are fun

Also point out how much fun it is to visit businesses. Emphasize that the video will prepare volunteers so that they will have fun while visiting the businesses. And the relationships and networks developed during these engagements could be invaluable connections moving forward.

Give volunteers a copy of "Guidelines for volunteer visitors"

The guidelines are in Appendix H (see p.83). A copy of the survey used in the video is provided in Appendix I (see p. 85). You may wish to distribute this so people can follow the dialogue more easily. Make sure people realize that this survey was **shortened** for the video illustration.

Show video 2

Don't forget to check your equipment before the meeting starts!

Group discussion of role playing

- Ask the group to point out what the person *asking the questions* did correctly and incorrectly. (Answers are in Appendix J; see p. 88.)

- Ask the group to point out what the person *taking the notes* did correctly and incorrectly. (Answers are in Appendix J; see p.88.)
- Finally, did the businessperson do anything wrong? Hint: as a general rule, the CBC program philosophy has the mindset that whatever businesspersons say in the interview, the visitors are there to listen.

Appendices

Appendix A: self-assessment guide for communities with prior business retention and expansion (BRE) visitation programs

Many communities have done BRE visitation programs. Some communities have had more success with their BRE visitation programs than others have. This self-assessment guide will help you decide whether your community has already participated in a BRE visitation program that is identical or similar to the program outlined in this handbook, and it will help you decide whether you should revitalize your BRE efforts.

If this guide is used at a local meeting, give each person a copy of this page and ask the attendees to independently circle answers to the questions. Then ask the group members to compare answers, discuss whether the community needs to revitalize its BRE efforts, and whether it should participate in the CBC program. Answer the following questions for the most recent BRE Visitation program completed in your community.

In our earlier BRE visitation program, we: (circle one per line)

	Agree	Disagree	Not sure
1. Visited at least 30 businesses.	A	D	N
2. Organized a local task force of at least 20 leaders from government, education, business, and professional developers.	A	D	N
3. Had survey results analyzed by an independent outside analyst.	A	D	N
4. Had a research report with suggested potential project ideas to help existing businesses.	A	D	N
5. Relied on the local task force to decide on the priority projects for implementation.	A	D	N
6. Established an effective procedure for handling immediate business concerns.	A	D	N
7. Had a written summary report that listed the names of at least 2-3 local leaders responsible for leading implementation of each strategy.	A	D	N
8. The local task force met at least quarterly for a year after the community meeting as part of the implementation effort.	A	D	N

If your community does not answer "A" to each of the above questions, then the program in this handbook is different than your earlier program.

Appendix B: discussion questions (Chapter 2)

Discussion questions for meeting #1: Is this CBC project for our community?

1. If you did a BRE visitation program in this community, please complete Appendix A and then outline how your earlier BRE program might differ from this approach.

After viewing the 3-community example (video segment 19:06 on z.umn.edu/BREvideos), complete the following discussion questions:

2. The video lists three steps for local BRE programs. Which of these steps do you feel are likely to be most important in our community? Why?

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

4. Interview a person from another community who has completed this type of CBC program. (A virtual Zoom session or Google Meet connection may be the most economical way to do this.) Ask them the following questions:

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

Name_____   Phone _____

Address

_____

City   _____   State _____   Zip _____

Employer _____

b. Could you tell us a little bit about your CBC (or BRE) program?

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

d. What do you see as two or three primary benefits of the CBC program in your community (or communities you have worked with)?

e. Given the benefits to yourself and your community, as well as the costs of doing the program, would you recommend that a person like me/us invest in the orientation program?

Yes, definitely

Yes, probably

Maybe

No, probably not

No, definitely not

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

g. Why is it important to have community leaders actively involved in the CBC program?

h. What groups are typically included in the task force? What are the advantages of having these different groups?

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

Discussion questions for meeting #2: objectives and local leaders

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

2. What do you see as the primary difference in the roles someone on the task force would play versus someone who is a volunteer visitor? (See Chapter 1 sections on
task force and volunteer visitors.)

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

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

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

6. Whom should we recruit to serve on the task force?

Discussion questions for meeting #3: plan of work

1. Whom should we invite to be in the task force from each of the following groups?

- Business leaders
- Economic development professionals
- Local government
- Educational institutions
- Other community leaders and reliable followers

2. Which member of the leadership team will do each of the tasks shown in the plan of work? (Fill out the plan of work sheet in Appendix D.)

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

4. Are there other tasks that need to be done that are not shown on the plan of work in Appendix D? If so, what are they, who should do them, and when should they be done?

5. How many businesses should we recommend visiting? (Remember that you need two-thirds as many volunteers as businesses to be visited, assuming each team visits three businesses or an equal number of visitors if each team visits two businesses.)

6. What types of businesses should we recommend be visited (mixed sector businesses, manufacturing, downtown/retail, tourism, or another sector)?

7. What do you think of the suggested agenda for the first task force meeting? Any changes needed?

8. What date, time, and place should we hold the first task force meeting?

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

Appendix C: task force meeting minutes (Chapter 2)

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

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

What decisions were made?

Appendix D: plan of work for Connecting Businesses and Community (CBC) (Chapter 2)

Communities involved in the CBC _____

CBC consultant: _____ Phone:_____
Email:_____

Leadership team members:

Overall coordinator: _____Phone:_____
Email:_____

Communications coordinator: _____Phone: _____
Email:_____

Visitation coordinator: _____Phone: _____
Email:_____

Business response coordinator: _____Phone: _____
Email:_____

Milestone meeting coordinator: _____Phone: _____
Email:_____

Task force members:

Businesspersons:

Economic development professionals:

Local government officials:

Educational professionals:

Other community leaders and reliable followers:

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

Preparations for the volunteer visitor training

If these preparations are made, the visitation completion rate will be quite satisfactory. While the visitation coordinator oversees this aspect of the program, all leadership team members and some task force members will need to help to get the tasks done on time.

Before the business visits are done

The visitation coordinator coordinates this stage of the program but will need the help of all the other members of the leadership team.

> Target date/person responsible

Practice visits

Select date   _____

Select two businesses to visit   _____

Send businesses letter and copy of interview guide (aka surveys).

Handle immediate follow-up from visits.

Make copies of surveys from practice visits and mail to the CBC data entry and analyst/writer office.

Find local economic development studies and reports.

Task force organizational meeting

Arrange room with internet connection.

Who will personally contact whom?

Mail out or email notices to task force.

Telephone tree reminder on meeting day.

Preparation for visitation volunteer training

Secure written endorsement from sponsoring group.

Secure written endorsements from other local groups.

Prepare mailing labels needed for the CBC. Note: Email may be used with volunteers, yet U.S. mail is still recommended as the premier way to send out the letter and interview guide to businesses.

   a. Businesses to be visited
   b. Volunteer visitors
   c. Task force members

Mail/email out notice of volunteer training.

Organize telephone/text tree for contacting volunteers on day of training.

Mail letter and interview guide to businesses.

Arrange meeting room for training (with internet connection).

Get TV and overhead projector, as appropriate.

Write a news release on the CBC project.

Select date of first task force meeting after business visits are started.

Preparations for media coverage

The communications coordinator does social media, writes news releases for the local media, and encourages media staff to cover the program at the following stages:

Applying for the program (if applicable)

Being accepted in the program

Training the volunteers

Visiting local businesses

Following up on business'/industry's concerns

Special interest stories on unique products or services of local businesses

Community commencement meeting

Implementation of specific recommendations

Preparations for immediate concerns or "red/green flag" review

The business response coordinator organizes this aspect of the program. However, she or he often will call on other leadership team members or task force members for assistance.

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

Prepare a 1-2 page summary on programs to send to businesses after business visits.

Organize two or three task force meetings for red/green flag review, starting two weeks after business visits are started.

Coordinate red/green flag follow-up by task force.

Preparations for task force retreat

The leadership team organizes this retreat under the coordination of the milestone meeting coordinator. This is about six to eight weeks after completing the visits.

Make physical arrangements for retreat.

Send out written invitations for retreat.

Organize telephone network for retreat.

Preparations for community commencement meeting

The milestone meeting coordinator also organizes leadership team efforts on this meeting, which is held about four or more weeks after the retreat (depending on the readiness of the priority project teams).

Make physical arrangements for retreat.

Send out written invitations for retreat.

Organize telephone network for retreat.

Implementation of priority projects

Date of first task force meeting after community commencement meeting.

Appendix E: Questions for CBC research report writers (Chapter 4)

To find an analyst/report writer, you may want to reach out to your local University of Minnesota Extension educator or examine the BREI consultant directory for other possible candidates. You may also consider other data experts or technical writers in your network or the private sector who may be able to provide these services. DEED is another Minnesota agency that may be able to assist with components of the research process as well, particularly providing the workforce, economic, and demographic data from government sources.

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

What do we get in the research report?

1. What information is included in the report?
2. Are the survey results presented in a strategic planning framework or just summarized?
3. Are suggested action plans presented to the local Task Force? If so, who develops these?

Do you provide assistance in developing a local consensus?

4. After the research report is written, does the analyst/report writer come to our community to present it?
5. Are the CBC interview results interpreted and presented to allow task force discussion? See chapter 3 section on "Arrange the task force retreat."
6. Does the local task force make all the final decisions on the priorities for implementation projects?

Do we get a summary report and other outputs?

7. Is a summary report written by the analyst/report writer after our task force sets its priorities?
8. Do you provide presentation-quality presentation materials/slide deck of the results?
9. Do you provide a news release with the final report and summary?

Can you give us references?

10. Can you give us a sample of an earlier CBC report or another type of analysis of a local economy that you have written?
11. Are you willing to provide the names and phone numbers of one to two community leaders with whom you have worked?

Appendix F: Sample letter for recruiting volunteers (Chapter 4)

(Note: This letter/email is only sent to individuals who have already been contacted personally by a task force member and *have agreed to participate.)*

Volunteer organization address

City, state, zip

Dear volunteer:

Thank you for agreeing to participate in the *(name)* Connecting Businesses and Communities (CBC) project. As a Volunteer Visitor, you are a critical element in this project, sponsored by *(local sponsor)* , the   *(local or regional sponsor)*   , and the   *(local or state sponsor)*   . The CBC program has been used in numerous counties and cities and regions throughout Minnesota and nationally.

The overall purpose of the CBC project is to assist our existing businesses. To do this, we have asked local community members, like yourself, to visit a few businesses with an interview guide to gather information about their needs, concerns, and opinions of *(list community)* as a place to do business. This information will help us improve our local business climate to better meet the needs of our existing and future businesses.

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

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

Please complete the enclosed response card/form (coordinator or assistant coordinator, you'll have to design your own response card/form) 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.

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

Sincerely,

        (name)

CBC visitation coordinator

        (agency)

enclosure/attachment: CBC volunteer visitors information sheet

Appendix G: Sample letter to business (Chapter 4)

Connecting Businesses and Communities project

Serving the communities of Holland County

(NOTE: This letter is sent to the businesses, with a copy of the interview guide, a few days before the volunteer training. We still recommend using the U.S. Mail, first class instead of email.

April 4, 2025

Dear _____.

The economic well-being of the cities and towns of Holland County depends on the well-being of our existing businesses. The Holland County Connecting Businesses and Communities (CBC) task force believes that varied businesses are a vital part of our economic base. To assist existing businesses and improve the local business climate, we are sponsoring a Connecting Businesses and Communities (CBC) project.

The CBC project is a joint effort by community members living in Holland County communities. A few local organizations have joined in sponsoring the effort (name them here).

Economic development groups and city councils throughout the county have been informed of the project and endorse the collaborative effort. The project involves local leaders and members visiting businesses to identify business concerns and needs. The visits use interview guides to gather information. Specifically, the CBC objectives are:

1. To demonstrate support for local businesses
2. To help solve immediate business concerns
3. To increase local businesses' ability to compete in the global economy
4. To establish and implement a strategic plan for economic development
5. To build community capacity to sustain growth and development

Enclosed, please find the interview guide that the volunteers will be using during the interviews. Volunteers will be contacting you within 10 days to schedule an appointment to conduct the interview. The interviews usually last about 1 - 1.5 hours. Let me emphasize that all the information shared during the interviews is strictly <u>confidential</u>.

I would greatly appreciate your cooperation with this community effort. Please, if you have any questions regarding this project, call me at your convenience (phone number) or contact one of the other leadership team members listed on this stationery.

Sincerely,

Nancy Norton,

Holland County Extension agent

CBC visitation coordinator

Enclosure: CBC interview guide

Appendix H: Guidelines for volunteer visitors (Chapter 5)

Purpose of these guidelines:

To ensure that the visitors and businesses enjoy doing the interviews and that good quality data are collected, leading to the retention and expansion of local businesses, jobs, and the other benefits of having businesses in the community

1. Tips on scheduling the business visits

Who schedules the visits*?* You or your partner.

Suggested conversation when you telephone the businesses assigned to you:

> "Good morning, my name is _____.
>
> Recently, you received a letter about a Connecting Businesses and Community project from _____.
>
> This is an effort to see what can be done to improve the business climate for our local businesses and to help them improve their profitability.
>
> Part of the project involves volunteers like me visiting with business owners or managers to get their opinions on these questions and to review the interview guide that came with that letter.
>
> My partner, _____, and I would like to schedule a visit with you next week. What would be a convenient time for you?"

When? Call within a week. Visit within 2-4 weeks.

Who should be visited? Owner or operator of the business.

Where? At the business' office or home of the person you are interviewing.

How long does it take? 60-90 minutes.

2. Tips on introducing yourself during the business visit

Break the ice and express thanks for the business's economic and other contributions to the community. Give the business owner an extra copy of the interview guide, if the person doesn't have one.

Cover the two important ground rules for the interview (*confidentiality of results* and the *skip-it rule*—if they don't want to answer a particular question, they can just say, "I'd like to skip that one.")

3. Tips for person asking questions: Ask every question.

Ask the question exactly as worded. No matter how bad the question seems, don't change it. However, if you want to ask another question in addition to the one on the interview guide, one

with slightly different wording, that is okay. If you ask this new one, write down both the new question and the answer.

Listen carefully (count silently to 10). As a visitor, your job is to listen to the opinions of the business. They really like that. If necessary, count silently to 10 as a means of staying quiet.

Repeat the question if necessary.

Never suggest answers, even if you are positive you know the correct one.

Probe answers. This is okay. You can ask something like, "Could you tell us a little more about that?"

Do not take offense to opinions. If you start debating their points, some owners will stop sharing them with you.

Do not promise any solutions. The CBC task force has no formal authority and budget with which to solve problems. They often can help businesses look into these problems.

4. Tips for person taking the notes:

Always circle (never check) responses.

Notes must tell the full story. The local task force and coordinators can't read your minds. If the notes are incomplete, the businesses might not be helped.

List visitors' names on the cover. If there are questions about your visit, you can be contacted.

Write clearly. Use complete sentences as much as possible.

5. Tips for after the visit

With your partner, discuss if there are urgent "red or green flag" issues (e.g,. businesses considering moving, closing, or expanding).

Note urgent concerns or "red or green flags" on the back cover.

Return the interview guides as soon as possible.

6. Name of person to call if you have problems (typically the visitation coordinator):

Phone number:_____

Appendix I: Notes to accompany volunteer visitor role play (Chapter 5)

Survey used in video -- role playing for volunteer visitors

(Note: This survey was shortened for purposes of the video. Most projects use surveys that last about an hour to 1.5 hours.)

Minnesota Falls Connecting Businesses and Community program

Cover sheet:

Name of firm being visited: _____

Address of firm: _____

City: _____ State: _____ Zip: _____

Name of person being interviewed: _____

Date of interview: _____

Persons doing visit: _____

The program is sponsored locally by the Minnesota Falls Chamber of Commerce, the Minnesota Falls economic development authority, and North Star Community College. We are getting technical assistance from the University of Minnesota Extension and the Minnesota Department of Employment and Economic Development. We have over 40 local leaders who are doing these business visits and participating in different parts of the project.

Our project has three major objectives. The first one is to demonstrate the community's willingness to help our existing businesses. The second is to identify the needs and concerns of our existing businesses so we can help retain them and even expand their employment. The third is to develop long range economic development plans for helping existing businesses.

The **confidentiality rule**: Your individual answers to this survey are confidential and will not be released except as required by law. Your responses will be summarized with those of other businesses and reported as percentages or averages only.

The **skip-it rule**: If there is a question that you feel might be best to skip, we will do that; just let us know. There is no need to explain your reasons.

1. Is all the information on the cover sheet accurate?

Yes   No (if not, correct it)

2. When did your business begin its operation here?   _____ (year)

3. What are your business' major products?

_____

4. Do you expect the demand for your products to increase, stay the same, or decrease over the next three years?

A. Increase

B. Stay the same

C. Decrease

5. Could you explain why you expect this?

6. Does your company have problems recruiting employees in the following categories?

    A. Professional/managerial
    B. Information technology
    C. Engineers, scientists and technicians
    D. Arts, design and other creative occupations
    E. Healthcare related
    F. Office and administrative
    G. Unskilled service workers
    H. Agriculture
    I.   Construction
    J. Repair and skilled maintenance
    K. Unskilled manufacturing
    L. Skilled manufacturing
    M. Transportation

7. Based on the following factors, please rate your satisfaction with your current location as a place for your company to do business.

1) K-12 schools	1	2	3	4	DK
2) Broadband cost and reliability	1	2	3	4	DK
3) Police protection	1	2	3	4	DK
4) Snow plowing	1	2	3	4	DK
5) Street maintenance	1	2	3	4	DK

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8. Are you currently considering?

    A. Downsizing
    B. Selling
    C. Merging with or acquiring another business
    D. Moving
    E. Closing
    F. Expanding
    G. None of the above

9. Considering everything, how would you rate this community as a place to do business?

    A. Excellent
    B. Good
    C. Fair
    D. Poor
    E. Very poor

Appendix J: Evaluation of the volunteer visitors in the role-playing video segment

If you oversee training the volunteers, show them the video entitled: **Tips for successful CBC business visits** and then give the following introduction and ask them these questions.

<u>Introduction:</u> Brigid Tuck (the person asking the questions) and John Bennett (the person taking the notes) intentionally did some things correctly and incorrectly while role playing. Now we want you to discuss them. Get into small groups and discuss the following two questions. When you are finished, we'll talk about these as a group.

A. What did Brigid Tuck, the person asking the questions, do correctly and what did she do incorrectly during the role play?

Points done correctly:

1. Brigid reviewed background, objectives, sponsorship and ground rules for the survey. (Note that this only took one minute and avoids many problems).
2. Brigid covered all the questions on the survey. (If some interviewers skip questions, the quality of the survey data is diminished greatly, and you will not be able to help your businesses as well.)

Points done incorrectly:

1. On question six, she didn't read the question exactly as written. (If each visitor asks questions in a different way, the survey results will be impossible to understand. The results will be apples and oranges!)

B. What did John Bennett, the person taking the notes, do correctly and what did he do incorrectly?

Points done correctly:

1. John asked if the business owner received a copy of the interview guide. (All of the businesses should have received an interview guide in the mail. But some business owners misplace them.)
2. John asked the business owner to repeat the name when he didn't get it. (This happens fairly often where the notetaker needs time or clarification. Don't be afraid to ask for time to complete notes.)
3. John wrote notes clearly. (Have mercy on those who have to read your notes later. They can't help the business if they can't read your notes.)

Points done incorrectly:

1. John didn't wait for an answer on question four on why the business owner expected sales to increase but jumped in and offered his own answer. (Remember, this defeats

the purpose of going on the visits. You want the businessperson's opinions, not that of the volunteer visitors.)

2. When the business owner rates the quality of broadband poorly, John promises to get this fixed. (He doesn't have the authority to do this. He could promise to bring it to the attention of the city but not to get it fixed.)

3. John objected and became argumentative when Mr. Taylor said that he was very dissatisfied with snowplowing and street maintenance. (This could cause the business owner to stop offering opinions. If the owner stops offering opinions, this reduces the quality of the data and makes it harder to help the business.)

4. John checked some of the questions rather than circling them. (Sometimes checking answers makes it very hard for the computer coder to understand the response, leading to errors in the results.)

Appendix K: Report on practice visits

(1) What businesses did you visit during your practice visits?

    a. Business name_____ City_____ Date_____

    b. Business name_____ City_____ Date_____

(2) How long did the visit take?

    Business #1: _____minutes   Business #2: _____minutes

(3) How were you welcomed by the business? (circle)

	Very cool reception		Neutral		Very warm reception
Business #1:	1	2	3	4	5
Business #2:	1	2	3	4	5

(4) What do you see as the benefits of collecting the data through personal visits?

(5) Which three of the "Guidelines for volunteer visitors" do you feel should be stressed the most in the volunteer isitor training? Why?

(6) Attach the completed interview guides.

Appendix L: Modernized sample media templates (i.e., press releases) for CBC program

(Note: we used AI (i.e., Chat GPT 4.0) to assist with updating the six press releases from the 1997 program materials.

#1 Applying for the program

Headline: [Community Name] Applies for UMN Extension Connecting Businesses and Communities CBC) Program

[City], [State]—Sponsoring agency] has officially applied to participate in the UMN Extension Connecting Businesses and Community (CBC) program, a community economic development program focused on supporting local businesses and driving sustainable economic growth.

"Helping our existing businesses grow and thrive is at the heart of this program," said [coordinator name], local coordinator of the CBC effort. "This is more than just a checklist—it's a deep dive into what our business community needs and how we can help."

The CBC program provides technical support and research tools to help communities gather data directly from businesses and use it to take action.

If accepted, the project will begin in [month/year], with volunteers trained to conduct structured interviews with local businesses.

Other communities have seen strong results. For example, in [community name], CBC efforts led to [brief example]. Likewise, [another region] leveraged the program to [another success story].

Confidentiality is a top priority. "No individual business information will be published," added [Extension educator name]. "Our focus is on identifying community-wide trends to guide future decisions."

#2 Accepted into the program

Headline: [Community Name] Accepted into Connecting Businesses and Communities Program

[City], [State] — [Community or county name] is excited to announce its official acceptance into the University of Minnesota Extension Connecting Businesses and Communities (CBC) program, for a collaborative initiative focused on strengthening local businesses.

"We're thrilled to begin this journey with our local businesses," said [local leader], coordinator of the project. "The potential to learn directly from our local businesses, retain talent, and improve our business climate is tremendous."

The program is sponsored locally by [local sponsor] and supported at the state level by [state sponsor]. The program fee of [$ amount] is covered through community partnerships.

Through this effort, a team of trained volunteers will visit approximately [number] local businesses in [month/quarter] to listen, learn, and help address key concerns. The data collected will inform both immediate support and long-term planning.

According to research by the Minnesota Department of Employment and Economic Development existing businesses created the majority of new jobs over the last 20 years, making this work essential to economic resilience.

#3 Training volunteers

Headline: Community Volunteers Prepare to Support Local Businesses Through Connecting Businesses and Communities (CBC) Project

[City], [State] ---This week, [number] community volunteers gathered at [location] for training to kick off the local Connecting Businesses and Communities (CBC) initiative.

The orientation, led by [name, title] from [state or regional partner], equipped volunteers with tools to interview local business owners and identify areas for support.

"This is about listening—and acting," said [coordinator name]. "We're fortunate to have a passionate team committed to growing our economy from within."

Volunteers will visit [number] businesses between now and [date]. The insights they gather will shape targeted responses to strengthen the local business environment.

Volunteer [name] shared, "The training was eye-opening. I'm excited to be part of a community effort that really makes a difference."

All business responses will remain confidential. Results will be aggregated and shared with the public at a community meeting later this year.

#4 Visiting local businesses

Headline: Local Businesses Share Their Voice Through Connecting Businesses and Communities (CBC) Interviews

[City], [State] — Starting this week, trained volunteers will begin visiting local businesses as part of [community name]'s Connecting Businesses and Communities (CBC) project.

"We're here to listen and take action," said [local leader name]. "This is a show of appreciation and a way to better understand what businesses need to thrive."

The program has four goals:

1. Show appreciation for the role local businesses play

2. Understand local challenges and concerns

3. Connect businesses with resources

4. Prioritize future economic development strategies

The CBC project is sponsored locally by [local sponsor] and receives support from [state sponsor].

Businesses are encouraged to be open and honest during the visits. All feedback will remain confidential and contribute to a summary report shared later this year.

#5 Follow Up

Headline: Local Connecting Businesses and Communities (CBC) Project Follow-Ups are underway

Instructions: This news release is not fully developed because follow-up work or success stories can follow many different channels. A few leads are provided to give you ideas about an article.

[City], [State]---Just months after launching the Connecting Businesses and Communities (CBC) project, [community name] is already seeing momentum.

- [Business name] announced they will expand locally, retaining or creating [number] jobs.

- [Training partner] unveiled an updated workforce curriculum aligned with business needs.

- Infrastructure upgrades are being planned following feedback from the business community.

"This is exactly why we do CBC," said [coordinator name]. "These real-world changes show how community collaboration can lead to meaningful impact."

These early successes stem from more than [number] interviews conducted with local businesses over the past [duration]. The program was made possible by [local sponsor] and supported by [state sponsor or University Extension].

#6 Community commencement meeting

Instructions: This news release is not fully developed because the commencement meetings vary considerably in format and content. Two leads seem pretty straight-forward: either start with the number of people attending, or start with the most important or interesting finding or recommendation that is presented at the meeting (sample leads are provided). The remainder of the news release should describe the results and recommendations of the program and quotes from the principal leaders as to the success of the program.

Headline: CBC Community Meeting Highlights Strengths, Opportunities for [Community Name]

[City], [State] — More than [number] community members gathered at [location] for a public presentation of results from the Connecting Businesses and Communities (CBC) project in partnership with University of Minnesota Extension.

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According to the data:

- [80+%] of businesses rated [community name] as a good or excellent place to do business

- Top priorities identified include: [top 1–3 insights]

"The response from our businesses was overwhelmingly thoughtful and constructive," said [coordinator name]. "We now have a roadmap for strengthening our local economy."

The leadership team and task force shared short-term action plans and long-term recommendations based on the findings. The summary report will be made publicly available online and at [local institution or library].

For more information, contact [coordinator contact info] or visit [website if applicable].

Appendix M: Red/green flag analysis worksheet

Connecting Businesses and Community (CBC) program   Interview guide ID number: _____

Red/green flag follow-up worksheet (page 1)   Date of review:_____

Red flag = something that might limit the business or lead to it closing, selling or leaving. **Green flag** = something that might lead to business expansion/investment in their location(s), jobs, other.

MOVING/CLOSING? Is the business moving or closing? When? Why? Can anything be done to change this? See page __, questions _____	What is the problem? What is your suggestion for handling it? How urgent is it?	Which official or agency should look into it? Which CBC task force member or other person should take charge of this issue?*
EXPANSION? Can the community remove any local bottlenecks? See page __, questions _____		
PUBLIC/PRIVATE SERVICES Can the community help improve the important public services that have weaknesses? See page __, questions _____		

*While one CBC task force member needs to make the initial contacts and monitor the assistance provided by other agencies and officials, the CBC task force members do not need to do all the follow up on their own. The most successful groups take full advantage of those state and federal programs that can help local businesses.

(Special note: Before using this worksheet, you should fill in the page and question numbers that refer to each issue.)

Connecting Businesses and Community (CBC) program

Red/green flag follow-up worksheet (page 2)

INFORMATION REQUESTS Can the CBC task force steer the business to the relevant agency or official? See page __, questions _____	What is the problem? What is your suggestion for handling it? How urgent is it?	Which official or agency should look into it? Which CBC task force member or other person should take charge of this issue?*
WORKFORCE CONCERNS? Who can assist on workforce concerns? See page __, questions _____		
PROBLEMS WITH PUBLIC BUSINESS ASSISTANCE PROGRAMS Can the community help improve the important public programs that have weaknesses, or connect businesses to them? See page __, questions _____		
OTHER CONCERNS Review entire survey for "red or green flags" that need urgent attention.		

Appendix N: Example evening agenda – task force retreat

Connecting Businesses and Community program

Agenda - task force retreat

Date, 4:30-8:30 p.m.

Welcome and introductions – milestone meeting coordinator 4:30

Overview of retreat and research report – CBC consultant or analyst/report writer 4:40

> CBC findings from the business interviews
> Profile of the city and county economy and demographics

Strategy one: Review of research results from business visits 5:15

> Individually read project descriptions
> In small groups, discuss suggested projects
> Nominate projects related to this strategy
> **Stretch break and move to new table**

Dinner break 6:00

Strategy two: 6:30

> Repeat steps from previous round
> **move to new table**

Strategy three: 7:00

> Repeat steps from previous round
> **move to new table**

Strategy four: 7:30

> Repeat steps from previous round

Stretch break 7:45

Moving into Step 3 - Implement: What happens after this retreat? 7:50

> Look at the CBC flow chart
> Set date for community commencement meeting

Discuss the nominated projects and choose priority projects 8:00

Project teams meet very briefly to outline their action plans 8:20

> 1. Who is on the team? 2. Agenda items for first meeting 3. Anything else important?
> Each project team: **Determines a date, place and convener for their first meeting.**

The analyst/report writer will create a 10–12-page report summarizing the CBC program.

A 2-3 paragraph priority project description is needed from each team.
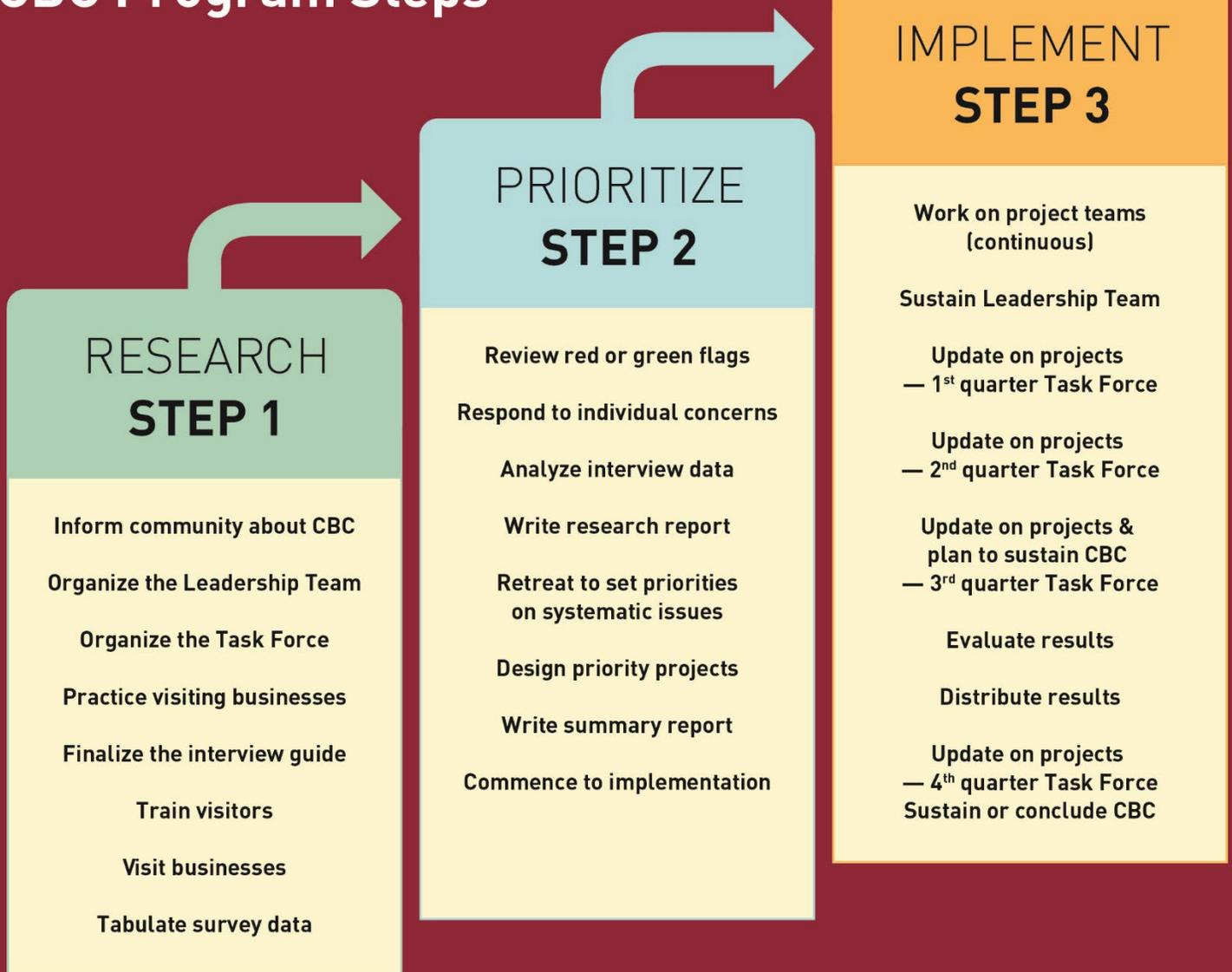
Please send your project summaries to _____ at email _____

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CBC Program Steps

RESEARCH
STEP 1

Inform community about CBC

Organize the Leadership Team

Organize the Task Force

Practice visiting businesses

Finalize the interview guide

Train visitors

Visit businesses

Tabulate survey data

PRIORITIZE
STEP 2

Review red or green flags

Respond to individual concerns

Analyze interview data

Write research report

Retreat to set priorities
on systematic issues

Design priority projects

Write summary report

Commence to implementation

IMPLEMENT
STEP 3

Work on project teams
(continuous)

Sustain Leadership Team

Update on projects
— 1st quarter Task Force

Update on projects
— 2nd quarter Task Force

Update on projects &
plan to sustain CBC
— 3rd quarter Task Force

Evaluate results

Distribute results

Update on projects
— 4th quarter Task Force
Sustain or conclude CBC

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