



COLUMBIA BASIN
RDI
RURAL DEVELOPMENT INSTITUTE

BUSINESS RETENTION & EXPANSION

Business Name: _____

NAICS Code: _____ Date: _____

Name of Person Interviewed: _____

Business Title: _____

Address: _____

Phone: _____ Mobile: _____ Fax: _____

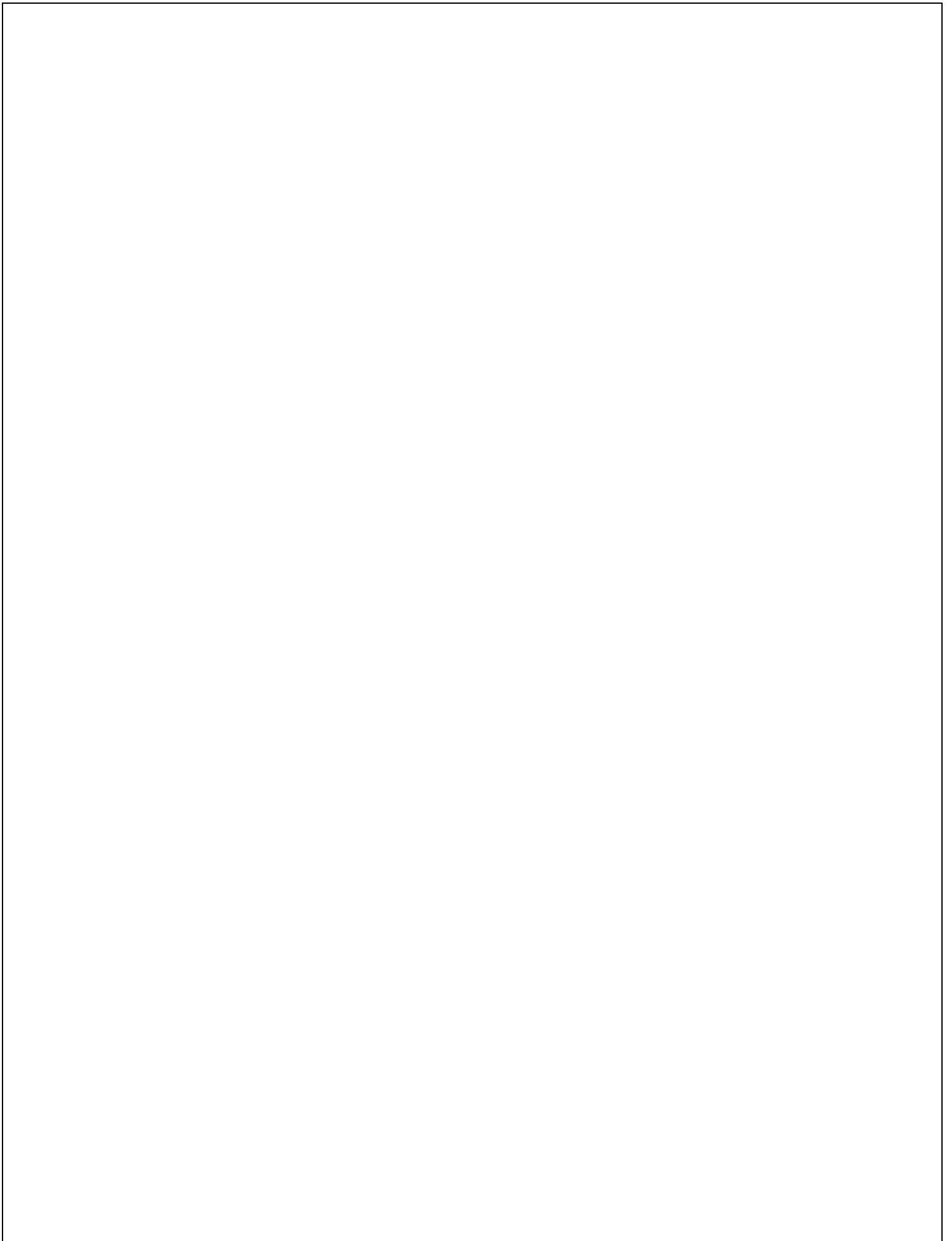
Email: _____

Website: _____

Preferred Contact: _____

Name of Researcher: _____

Confidentiality Reviewed and Consent Form Signed: yes no



COMPANY INFORMATION

1. What are the main products / services provided at this location?

2. Who are your main competitors (indicate if local, regional, national, international)?

3. a) What are the factors that make your company successful here?

b) Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify 'other'. (Q7)

'Competitive' Factors	Very important	Somewhat important	Not very important	Not important at all	Not applicable
New product research and development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
New market development locally	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
New market development outside of region	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to exporting and international markets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Add or change in business, products or services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Strategic alliances (joining with other businesses to provide products / services)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improving worker productivity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Expansion of workforce employees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Workplace health and safety	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Workforce skill development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Energy costs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Water/sewer availability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

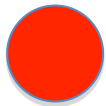
Water/sewer costs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reliable air transportation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Affordable shipping / freight	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improvement of customer services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Available telecommunications infrastructure & services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Exchange rate for Canadian dollar	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accessing capital	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improve business management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

4. At what stage in the business lifecycle is this company?
 Emerging Growing Maturing (status quo) Declining

5. What is the company's ownership status?
 Privately owned Publically owned

6. What is this company's legal status?
 Sole Proprietorship
 Partnership
 Corporation
 Limited Liability Partnership (LLP)
 Non-Profit
 Other (specify, i.e. cooperative) _____

7. How long has your business been in operation? (Q8 in Business Counts survey)
 less than 1 yr. 1-4 yrs. 5-9 yrs. 10-19 yrs. more than 20 yrs.



QUESTIONS 8-12 ONLY FOR BUSINESSES WITH A PARENT COMPANY – SKIP TO Q13 IF NOT APPLICABLE

8. Where are the business headquarters located? (formerly Q7 in Business Counts survey)
 British Columbia
 Elsewhere in Canada
 Outside of Canada

9. What is the name of the parent company, if different? _____

10. What functions are located at this facility?
 distribution engineering/RD headquarters manufacturing

services warehousing other _____

11. Does this company have another Canadian location that provides a similar product/service as the local operation?

Yes No

If yes, please explain.

12. Does this company have another location elsewhere in the world that provides a similar project/service as the local operation?

Yes No If yes, please explain.

13. Has the owner changed at this business / at this location in the past 5 years?

Yes No



IF NO → GO TO Q15

14. If yes, please describe the local impact of the change in ownership.

Positive Neutral Negative

15. Has the management changed at this business / at this location in the past 5 years?

Yes No



IF NO → GO TO Q17

16. If yes, please describe the local impact of the change in management.

Positive Neutral Negative

17. Is an ownership change pending for this business / location?

Yes No



IF NO → GO TO Q20

18. If yes, what is the anticipated time frame?

1 yr. or less 2 yrs. 3-5 yrs. 5-10 yrs. more than 10 yrs.


19. If yes, how do you intend to exit the business?

sell/transfer to family member sell/transfer to non-family member
 sell to another company close the business other _____

20. Estimate age of respondent.
 over 65yrs 60-65 yrs. 54-59 yrs. 50-54 yrs. 45-49 yrs. 44 & under

21. a) Have you identified a successor for your business?
 Yes No

22. Is there a formal succession plan in place?
 Yes No Not applicable

23. If yes, have you been assisted in the preparation of a succession plan?
 Yes No  **IF NO → GO TO Q25**

24. If yes, by whom?
 accountant banker business partner
 lawyer online resources financial planner
 spouse other _____

25. Does this business have a current business plan (within the last 5 years)?
 Yes No

26. Additional Comments related to 'Company Information'.

LOCAL WORKFORCE

27. a) Please indicate the total number of employees (at this location).
Full-time: _____ Part-time: _____ Temporary: _____ Total: _____

b) In general terms, what percent of your workforce lives in the: (Q4)

_____ community (%)
_____ region (%) – includes entire Columbia Basin-Boundary region
_____ outside of region (%)

28. Over the last 10 years has the total number of employees:
 Increased Stayed the same Declined

29. How many employees do you expect to have in 1 year? Total: _____

30. How many employees do you expect to have in 3 years? Total: _____

31. How did the number of staff change, if at all over the **last 3 years**?

Full Time: Increased Stayed the same Decreased

Part Time: Increased Stayed the same Decreased

Temporary: Increased Stayed the same Decreased

32. How did you expect the number of staff change, if at all over the **next 3 years**?

Full Time: Increase Stay the same Decrease

Part Time: Increase Stay the same Decrease

Temporary: Increase Stay the same Decrease

33. Is the number of unfilled positions:

Increasing Staying the same Decreasing

34. Does the company provide a training budget in order to upgrade employee's skills?

Yes No

35. a) Where does this business attract the majority of its workforce from?

Locally Regionally Nationally Internationally

b) If applicable, please describe any recruitment activities or strategies you have undertaken to attract employees. (Q1)

36. Please indicate the skill level of your workforce.

Skilled: _____% Semi-Skilled _____% Entry-Level _____%

37. Please indicate the average hourly wage for each skill level.

Skilled: \$ _____ Semi-Skilled: \$ _____ Entry-Level: \$ _____

38. Do you pay more, the same or less than other businesses within the region?

Greater than Same as Lower than

39. How old are the majority of your essential employees?

Less than 25 yrs. 26-34 yrs. 35-49 yrs. 50 yrs. or older

40. a) Do you have challenges retaining employees?

Yes No

b) If yes, please explain why?

c) Please indicate which issues you believe are critical to your employees? (Q2)

housing transportation child care cost of living other (list)

d) If applicable, please describe any efforts you have undertaken to retain employees. (Q3)

41. Is your business experiencing recruitment challenges with any employees positions or skills?

Yes No

b) If yes, please indicate in which areas?



DON'T READ OUT CATEGORIES

- | | | |
|---|---|---|
| <input type="checkbox"/> admin/clerical | <input type="checkbox"/> graphics arts/printing | <input type="checkbox"/> mechanics |
| <input type="checkbox"/> advanced mfg workers | <input type="checkbox"/> healthcare professionals | <input type="checkbox"/> plant managers/operators |
| <input type="checkbox"/> agriculture/ farming | <input type="checkbox"/> hospitality service | <input type="checkbox"/> prof/info tech/programming |
| <input type="checkbox"/> assembler/line workers | <input type="checkbox"/> machine operators | <input type="checkbox"/> professional other |
| <input type="checkbox"/> CDL drivers | <input type="checkbox"/> machinists | <input type="checkbox"/> professional technical |
| <input type="checkbox"/> construction/contractors | <input type="checkbox"/> maintenance | <input type="checkbox"/> sales/retail |
| <input type="checkbox"/> electrical/electronics | <input type="checkbox"/> manufacturing other | <input type="checkbox"/> sales service |
| <input type="checkbox"/> food/beverage service | <input type="checkbox"/> marketing | <input type="checkbox"/> other _____ |
| <input type="checkbox"/> general labourer | <input type="checkbox"/> material/fabricators | <input type="checkbox"/> other _____ |

'Other' notes _____

42. Do you anticipate future recruiting difficulties (i.e. in 3-5 years)?

- | | | |
|---|---|---|
| <input type="checkbox"/> admin/clerical | <input type="checkbox"/> graphics arts/printing | <input type="checkbox"/> mechanics |
| <input type="checkbox"/> advanced mfg workers | <input type="checkbox"/> healthcare professionals | <input type="checkbox"/> plant managers/operators |
| <input type="checkbox"/> agriculture/ farming | <input type="checkbox"/> hospitality service | <input type="checkbox"/> prof/info tech/programming |
| <input type="checkbox"/> assembler/line workers | <input type="checkbox"/> machine operators | <input type="checkbox"/> professional other |
| <input type="checkbox"/> CDL drivers | <input type="checkbox"/> machinists | <input type="checkbox"/> professional technical |
| <input type="checkbox"/> construction/contractors | <input type="checkbox"/> maintenance | <input type="checkbox"/> sales/retail |
| <input type="checkbox"/> electrical/electronics | <input type="checkbox"/> manufacturing other | <input type="checkbox"/> sales service |
| <input type="checkbox"/> food/beverage service | <input type="checkbox"/> marketing | <input type="checkbox"/> other _____ |
| <input type="checkbox"/> general labourer | <input type="checkbox"/> material/fabricators | <input type="checkbox"/> other _____ |

'Other' notes _____

43. Does this business have union status?

- Yes No Not applicable

44. If yes, what is the status of labour-market relations?

- Excellent Good Fair Poor

45. a) Is there any areas of training or professional development that would be of benefit to you or your employees?

- Yes No

b) If yes, please explain why?

46. When you do attend training / certification, where do you usually access the training?

- Local Regional British Columbia Rest of Canada United States

47. What modes of education / training work best for you?

- classroom individual coaching online/webinar training other _____

48. a) Are you aware of any anticipated trends, technologies, significant changes that will be occurring in your industry that will require new skills?

- Yes No

b) If yes, please identify. (for data entry - add to additional notes below)

49. Additional Comments related to 'Local Workforce'.

SALES

50. Please indicate your annual sales. \$ _____ annual sales are private

51. Is the market for your product? increasing stable decreasing

52. Compared to your competitors, is your market share?

increasing stable decreasing

53. What is your business' projected sales growth in the next year?

greater/ equal to 100% 50-99% 25-49% 10-24%
 1-9% 0% declining

54. Please indicate your sales trend over the last 10 years.

This location: Increasing the same Decreasing N/A
Parent company: Increasing the same Decreasing N/A
This industry: Increasing the same Decreasing N/A

55. Additional notes related to sales trends.

56. What percentage of total sales is generated by your top 3 customers?

76-100% 51-75% 26-50% 10-25% 1-9%

57. Do you engage in government procurement?

Yes No

58. Please identify the source of your sales by percentage and location.

Regional ___% Provincial ___% National ___% U.S. ___% International ___%

59. a) Please identify the source of your supplies by percentage and location.

Regional ___% Provincial ___% National ___% U.S. ___% International ___%

b) What products or services, if any, are you purchasing from outside the area for which you would like to have a local supplier? (Q5)

c) If majority of products / services are being purchased from outside of the area, why are they NOT being purchased from within the area? (Q6)

- Product not available here
- Unaware of local vendors
- Higher costs locally
- No control, head office decision
- Quality of available products
- Long term contract with outside supplier
- Loyalty to current supplier
- Not applicable to this business
- Other? (specify) _____

60. Please indicate your business' international trade status:


Import Export None N/A

61. Please indicate your business' export sales trend over the last 10 years.

Increasing the same Decreasing N/A

62. Additional Comments related to 'Sales'.

FACILITY / EQUIPMENT

63. What is the square footage of your facility? _____ sq/ft
64. a) Is your facility owned or leased?
- Leased Owned  **IF OWNED → GO TO Q66**
- b) If **leased**, what is the length of the term remaining?
- less than 1 yr. 1-2 yrs. 3-5 yrs. more than 5 yrs.
65. a) Are you planning on renewing your current lease?
- Yes No
- b) If no, why not? _____
66. Please rate the condition of your facility and equipment.
- FACILITY: Excellent Good Fair Poor N/A
- EQUIPMENT: Excellent Good Fair Poor N/A
67. Please describe the operations at this location.
- One shift Two shifts 24 hours
68. Please indicate your investment trends over the last 18 months.
- FACILITY: Increasing the same Declining N/A
- LOCATION: Increasing the same Declining N/A
69. Is there room for expansion at this site?
- Yes No Maybe
70. Are you aware of energy efficiency resources that are available to you? (i.e. Fortis, BC Hydro)
- Yes No
71. Does the company plan to expand in the next 3 years? Yes No
- Will it be in this community? Yes No
- Is your current site adequate for the proposed expansion? Yes No
- \$ _____ Estimated Total Investment
- _____ Approximate Percentage equipment/technology
- _____ Approximate percentage real estate
- _____ Estimated facility size increase (sq/ft)
- Estimated time frame for expansion? < 1 yr. 1-3 yrs. > 3yrs.

Disposal of waste material	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Recycling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Inspections (e.g. licensing)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Development approval process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Telecommunications (tel, Internet, cell)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Availability of buildings for lease or purchase	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Availability of appropriately zoned land	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Water and sewerage supply	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

78. Do you have any suggestions on how to improve any of the services and infrastructure listed above?
 Yes No

If yes, how? _____

79. Additional Comments related to 'Government Services'.

BUSINESS CLIMATE

80. a) Please rate the following factors related to the business climate of the area.
 1=Excellent; 2=Good, 3=Fair; 4=Poor; 5=No Opinion

Business Climate Factors	1	2	3	4	5
Workforce quality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Workforce availability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Workforce stability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local government	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local tax structure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provincial tax structure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other _____ ○ ○ ○ ○ ○ ○

Other _____ ○ ○ ○ ○ ○ ○

Other _____ ○ ○ ○ ○ ○ ○

d) Please indicate which economic drivers have the greatest potential for growth in the region over the next 5 to 10 years (please pick top 3). (Q8)

- Forestry
- Manufacturing
- Education
- Tourism
- Technology-based businesses
- Arts, culture and creative businesses
- Health & wellness
- Relocation of people from urban centres
- Government
- Green or environmental businesses
- Finance
- Construction
- Other niche service businesses (e.g. services to seniors)
- Agriculture
- Other (specify) _____

81. Notes on business climate rankings:

82. Please rate the local business climate: ○ Excellent ○ Good ○ Fair ○ Poor

83. What are the community's strengths as a place to do business?

84. What are the community's weaknesses as a place to do business?

85. Are there any barriers to growth in this community?

Yes No

If yes, what are they?

86. Are there suppliers you think could locate in this region?

Yes No

If yes, please list. _____

87. Are there customers that we should attract to this region?

Yes No

If yes, please list.

88. Please compare the local business climate today versus 5 years ago?

Better today No change Worse today No opinion

If worse today, why? _____

89. Please forecast the condition of the local business climate 5 years from today:

Will be better No change Will be worse No opinion

90. Additional Comments related to 'Business Climate'.

ASSESSMENT

91. a) Please rate the following:
1=Excellent; 2=Good, 3=Fair; 4=Poor, 5=Not Applicable

	1	2	3	4	5
Business' overall health	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall health of the parent company	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local management's attitude toward community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Parent company's attitude toward community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

- b) Please rate the following productivity drivers as they relate to your businesses. (Q9)**
1=Excellent; 2=Good, 3=Fair; 4=Poor, 5=N/A

	1	2	3	4	5
Leadership and management capacity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Productive workplace culture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Innovation & the use of technology	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Investing in people and skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Organizing work (structures & processes)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Networking and collaboration with other businesses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Measuring impact of productivity efforts/ investments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

92. Please rate the risk:
1=Low; 2=Moderate, 3=High

	1	2	3
Business closing in next 1-3 years	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Business downsizing in next 1-3 years	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Business relocating in next 1-3 years	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

93. Are there any local expansion plans in the next 12-18 months?
 Yes No

94. Additional Comments related to 'Assessment'.
