



COLUMBIA BASIN
RDI
RURAL DEVELOPMENT INSTITUTE

BASIN BOUNDARY BUSINESS RETENTION & EXPANSION PROJECT

Business Name: _____

NAICS Code: _____ Date: _____

Name of Person Interviewed: _____

Business Title: _____

Address: _____

Phone: _____ Mobile: _____ Fax: _____

Email: _____

Website: _____

Preferred Contact: _____

Confidentiality Reviewed and Consent Form Signed: yes no

COMPANY INFORMATION

1. What are the main products / services provided at this location? (Q1)

2. At what stage in the business lifecycle is this company? (Q4)
 Emerging Growing Maturing (status quo) Declining
3. What is this company's legal status? (Q6)
 Sole Proprietorship Partnership Corporation
 Limited Liability Partnership (LLP) Non-Profit
 Other (specify, i.e. cooperative) _____
4. How long has your business been in operation? (Q7)
 less than 1 yr. 1-4 yrs. 5-9 yrs. 10-19 yrs. more than 20 yrs.
5. a) Is an ownership change pending within the next 10 years for this business / location? (Q17)
 Yes No **IF NO → GO TO Q6**
- b) If yes, what is the anticipated time frame? (Q18)
 1 yr. or less 2 yrs. 3-5 yrs. 5-10 yrs. more than 10 yrs.
- c) If yes, how do you intend to exit the business? (Q19)
 sell/transfer to family member sell/transfer to non-family member
 sell to another company close the business other _____
- d) Have you identified a successor for your business? (Q21)
 Yes No
- e) Is there a formal succession plan in place? (Q22)
 Yes No Not applicable
- f) If you have been assisted in the development of a succession plan, who has assisted? (Q24)
 accountant banker business partner
 lawyer online resources financial planner
 spouse other _____

LOCAL WORKFORCE

6. a) Please indicate the total number of employees (at this location). (Q27)
Full-time: _____ Part-time: _____ Temporary: _____ Total: _____
- b) How many employees do you expect to have in 3 years?(Q30) Total: _____
- c) Over the last 10 years has the total number of employees: (Q28)
 Increased Stayed the same Declined

7. **In general terms, what percent of your workforce lives in the: (RDI Q4)**

_____ **community (%)**

_____ **region (%) – includes entire Columbia Basin-Boundary region**

_____ **outside of region (%)**

8. How old are the majority of your essential employees? (Q39)
 Less than 25 yrs. 26-34 yrs. 35-49 yrs. 50 yrs. or older
9. a) Do you have challenges retaining employees? (Q40) Yes No
b) If yes, please explain why?

- c) Please indicate which issues you believe are critical to your employees? (RDI Q2)
 housing transportation child care cost of living other (list)

10. a) Are there any areas of training or professional development that would be of benefit to you or your employees?(Q45) Yes No
b) If yes, please explain.

11. Is your business experiencing recruitment challenges with any employees' positions or skills? (Q41)

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 _____

12. Do you anticipate future recruiting difficulties (i.e. in 3-5 years)? (Q42)

- | | | |
|---|---|---|
| <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 _____

SALES

13. Is the market for your product? (Q51) increasing stable decreasing

14. What is your business' projected sales growth in the next year? (Q53)

greater/ equal to 100% 50-99% 25-49% 10-24%

1-9% 0% declining

15. What percentage of total sales is generated by your top 3 customers? (Q56)

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

16. Please identify the source of your sales by percentage and location. (Q58)

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

17. a) Please identify the source of your supplies by percentage and location. (Q59)

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

b) If majority of products / services are being purchased from outside of the area, why are they NOT being purchased from within the area?(RDI 6)

- 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) _____**

FACILITY / EQUIPMENT

18. Please rate the condition of your facility and equipment. (Q66)

FACILITY: Excellent Good Fair Poor N/A

EQUIPMENT: Excellent Good Fair Poor N/A

19. a) Do you plan to expand in the next 3 years? (Q71) Yes No

b) Will it be in this community? Yes No

c) Is your current site adequate for the proposed expansion? Yes No

d) What is your estimated time frame for expansion? < 1 yr. 1-3 yrs. > 3yrs.

e) If you plan to expand, what, if any, are the major constraints on your expansion?(Q72)

- broadband access
- energy reliability
- identifying/accessing new markets
- lack of suitable premises
- problems with development approvals
- transport/freight
- energy costs
- financing
- lack of skilled staff
- local regulations (e.g. zoning)
- roads
- warehousing

other _____

f) If you approached anybody in local/provincial/federal government or business development organizations to discuss your expansion plans please indicate who. (Q74)

- Hydro Provider (eg. Fortis, BC Hydro)
- Chamber of Commerce
- Local Council / Regional District
- BC Ministry (Jobs, Tourism, Innovation)
- Community Futures
- Local Economic Development Office

other _____

g) What type of information or support, if any, could be provided to support your expansion? (Q76)

GOVERNMENT SERVICES

20. a) Please rate the following. (Q77)
 1=Excellent; 2=Good, 3=Average; 4=Fair; 5=Poor

| Services | 1 | 2 | 3 | 4 | 5 | N/A |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Access to airport facilities | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Access to highways/roadways | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Access to markets | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Access to suppliers | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Availability of road transport services | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Availability of rail transport | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Availability of warehousing | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 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"/> |

- b) Do you have any suggestions on how to improve any of the services and infrastructure listed above? (Q78)

BUSINESS CLIMATE & BUSINESS HEALTH

23. a) Please rate the following factors related to the business climate of the area. (Q80)
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"/> |
| Workers compensation rates | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Economic development | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Cultural/recreational amenities | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Housing | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| K-12 education | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Colleges / universities | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Technical training | <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"/> |

- b) Is your business impacted by its proximity to the Alberta border?

Yes No

If yes, please explain. _____

- c) Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.

1=Excellent; 2=Good; 3=Fair; 4=Poor; 5=Unable to assist; 6=Not applicable

| Business Support Providers | 1 | 2 | 3 | 4 | 5 | 6 |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Chamber of Commerce | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Community Futures | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Economic Development Organization / Commission | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Innovation Councils (Kootenay Association for Science and Technology, Kootenay Rockies Innovation Council) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

| | | | | | | |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Basin Business Advisors (BBA) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| College Continuing Education and Workforce Training | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Kootenay Aboriginal Business Advocates Society | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Invest Kootenay | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| National Research Council Industrial Research Assistance Program | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Scientific Research and Experimental Development Tax Incentive Program | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| College Industry Liaison Officer | <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"/> |

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). (RDI 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) _____**

24. Please rate the local business climate: (Q82) Excellent Good Fair Poor

25. Are there any barriers to growth in this community? (Q85)

Yes No

If yes, what are they? _____

26. Please compare the local business climate today versus 5 years ago? (Q88)

Better today No change Worse today No opinion

If worse today, why? _____

27. Please forecast the condition of the local business climate 5 years from today: (Q89)

Will be better No change Will be worse No opinion

28. a) Please rate the following productivity drivers as they relate to your business(RDIQ9)

1=Excellent; 2=Good, 3=Fair; 4=Poor, 5=Not Applicable

| | 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"/> |
| Business' overall health | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

29. Please rate the risk: (Q92)

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"/> |

30. 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'. (RDIQ7)

| '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"/> |

