



COLUMBIA BASIN
RDI
RURAL DEVELOPMENT INSTITUTE

Business Retention & Expansion: How to Implement a BRE Project in Your Community

2013

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Columbia Basin Rural Development Institute,
Selkirk College

Agenda

INTRODUCTIONS & OVERVIEW

- Introductions
- RIC & the RDI
- BRE Overview
- Regional RDI Applied Research Project
- Assessing Community Readiness

IMPLEMENTING THE BRE & MOBILIZING RESULTS

- Roles & Responsibilities
- Timeline & Implementation Stages
- Communications
- Research to Action and Scenarios

RESEARCH PROTOCOLS & MOCK INTERVIEWS

- Lessons Learning from Year 1 Pilots
- Research Methodology & Protocol
- Review of Interview Guidelines
- Mock Interviews

USING THE ONLINE DATABASE & CLIENT MGT. SYSTEM

- Using e-pulse CMS

INTRODUCTIONS & OVERVIEW



“Change is the law of life and those who look only to the past or the present are certain to miss the future.” John F. Kennedy

- **Introductions**
- **RIC & the RDI**
- **BRE Overview**
- **Regional RDI Applied Research Project**
- **Assessing Readiness**

WORKSHOP CONTENT & LEARNING OUTCOMES

INTRODUCTIONS & OVERVIEW

IMPLEMENTING THE BRE & TAKING ACTION

RESEARCH PROTOCOLS & MOCK INTERVIEWS

USING E-PULSE

Understand
BRE and its
major program
elements

Be comfortable
explaining &
promoting BRE

Ready to take a
leadership role
in BRE
implementation

Have confidence
using & showing
others how to
use BRE tools

REGIONAL INNOVATION CHAIR IN RURAL ECONOMIC DEVELOPMENT

- \$1.5 million in matching funds from within the West Kootenay-Boundary
- 21 BC Research Chairs (Health-7, Technology-2, Enviro-3, Social-5, Economic-4)
- One of only 2 RICs located at a college
- Extensive affordable housing research in first 5 years

Selkirk College gratefully acknowledges the generous contributions and support of the following individuals and organizations:



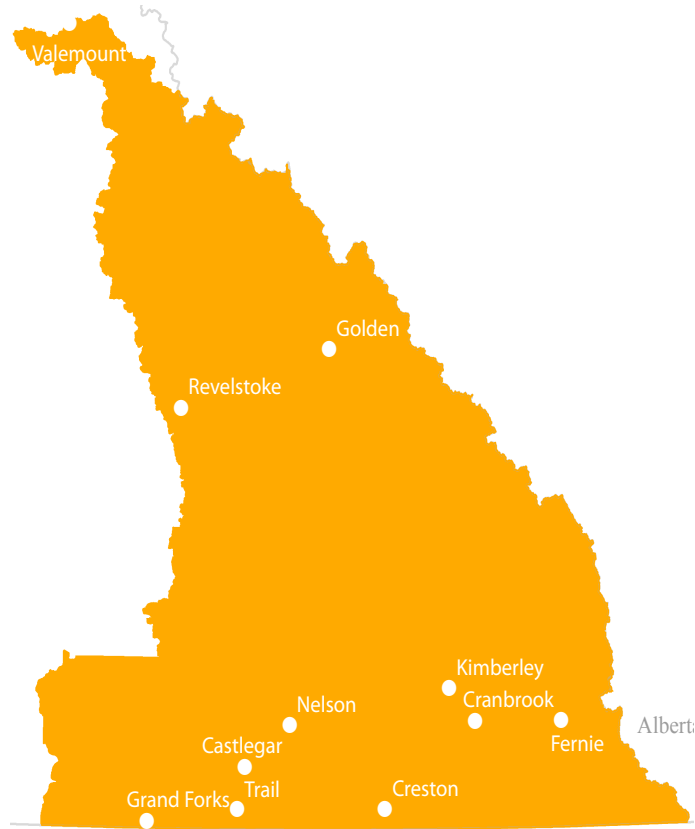
Ron Anderson

Christian Schadendorf





COLUMBIA BASIN RURAL DEVELOPMENT INSTITUTE



- **Multi-year partnership** to support informed decision-making
- The **only college-based ‘rural’ RDI** in Canada
- **Basin & Boundary** catchment area
- Research focus extends **beyond ‘economic’**
- **Regional approach**, addressing identified regional sub-regional needs



COLUMBIA BASIN RURAL DEVELOPMENT INSTITUTE



**SUPPORT INFORMED DECISION-MAKING THROUGH
RELEVANT & TIMELY REGIONAL RESEARCH**

**BUILD CAPACITY OF KEY STAKEHOLDERS THROUGH THE
PROVISION OF BEST PRACTICE TOOLS & SUPPORTS**



**PROMOTE INNOVATION & KNOWLEDGE
TRANSFER IN & ACROSS SOCIAL, CULTURAL,
ENVIRONMENTAL & ECONOMIC SECTORS**

Research Snap Shot



**RESEARCH REPOSITORY & ONLINE
'COLLABOARATE SPACE'**



**STATE OF THE BASIN
MONITORING & REPORTING**



**ATTRACTING YOUNG
ADULTS TO RURAL
REGIONS KBM PROJECT**



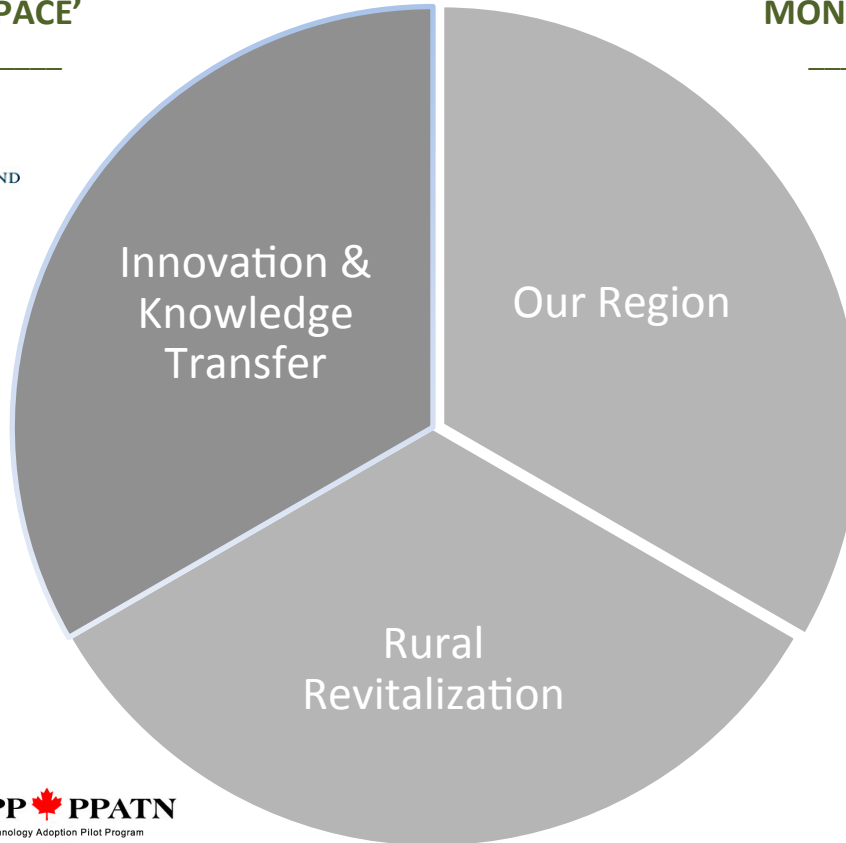
**STATE OF THE ENVIRONMENT
PROJECT**



**MAPPING INNOVATION
ACROSS ECONOMIC, SOCIAL,
CULTURAL AND
ENVIRONMENTAL SECTORS**



**EMPLOYMENT LANDS & THE
DIGITAL BASIN**



**SME ADOPTION OF DIGITAL
TECHNOLOGIES PROJECT**



**RURAL COMMUNITY SERVICE
LEARNING PARTNERSHIP**



**BUSINESS RETENTION &
EXPANSION PILOT PROJECT**



REGIONAL GEOSPATIAL LANDS INVENTORY

Purpose: To support informed land use decision making through the production of a baseline GIS inventory of available commercial, industrial and agricultural lands and related economic assets and gaps that exist in the region.

- To produce a regional baseline employment lands, infrastructure and related economic assets inventory database and web-based GIS tool
- To bring together key stakeholders in a series of forums to generate regional discussion and analysis of the employment lands landscape
- Assess whether there is adequate inventory (supply) of employment lands available for the development of new or expanding investment and job creation



SELKIRK-SME ADOPTION OF DIGITAL TECHNOLOGIES PROJECT

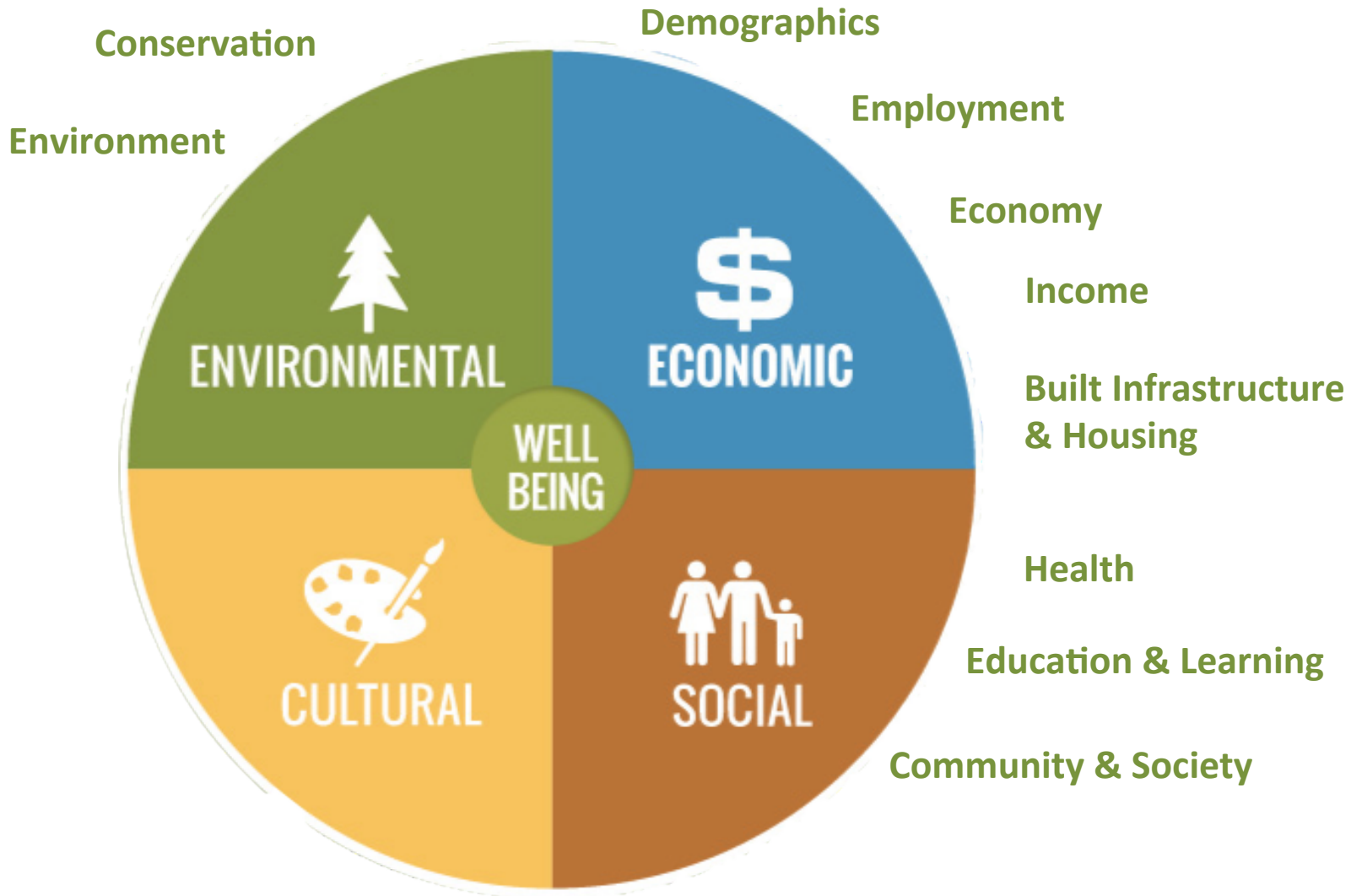
Purpose: To support SMEs in their adoption of digital technologies through the provision of training, advisory services and direct support.

- Research SME needs and college capacity to support digital technology adoption
- Provide 4-6 ADT workshops / short courses to a min of 20 SMEs and 3 online courses piloted to a min of 10 SMEs
- Advisory services provided to between 25-30 SMEs
- Direct support to min of 10 SMEs via ADT pilot projects

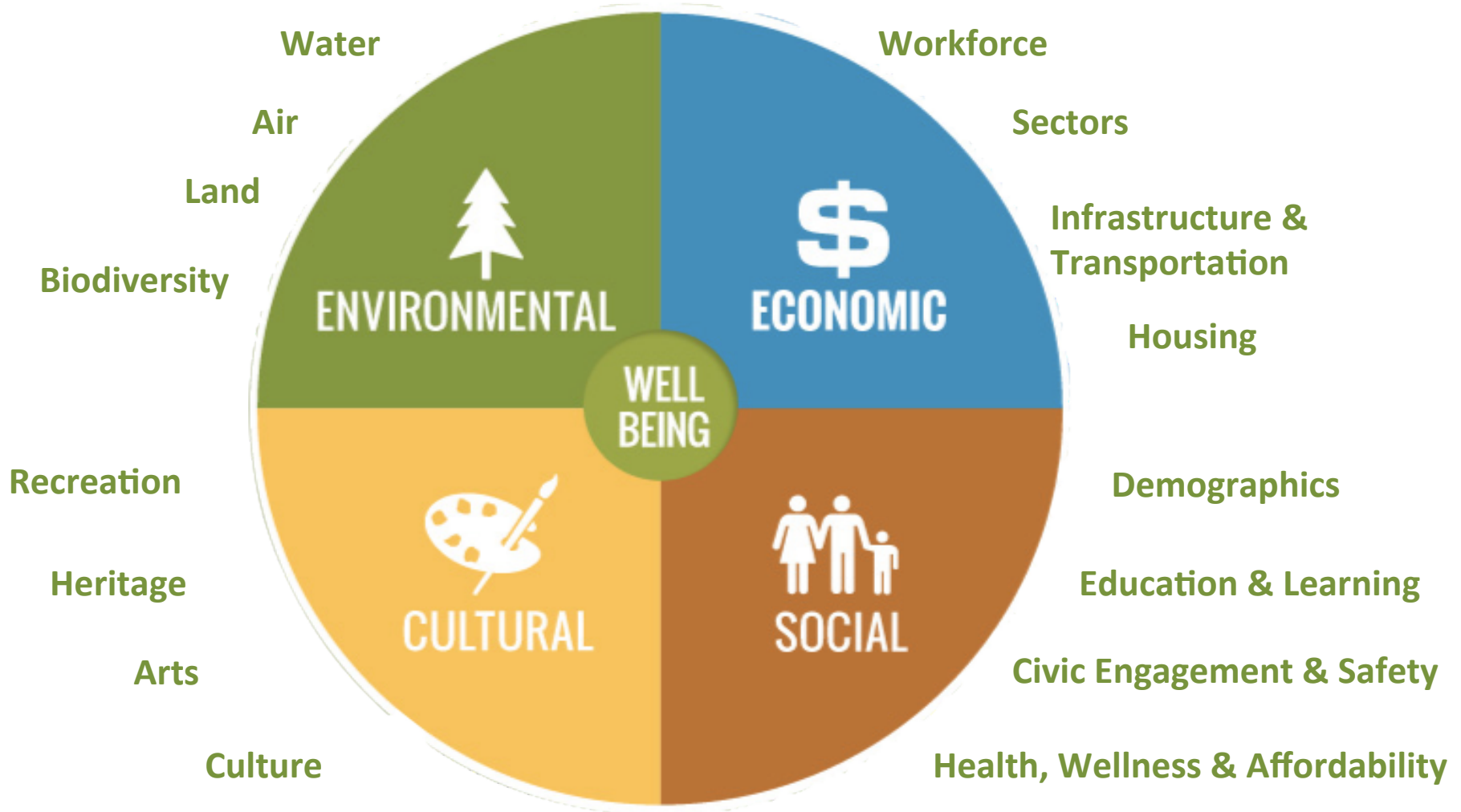
STATE OF THE BASIN: INITIAL FRAMEWORK



STATE OF THE BASIN: TRANSITIONING THE FRAMEWORK



STATE OF THE BASIN: TRANSITIONING THE FRAMEWORK



What is Business Retention & Expansion?

- **Ongoing cooperative effort** between business, local government, and support organizations
- Focused on **identifying and responding to the needs** of existing businesses
- Efforts are **focused on supporting retention & expansion** of businesses already in your community
- A highly **effective economic development approach**, especially in rural areas

Why is it important?

- **Fosters job growth** from within the community (up to 90% of new jobs come from existing businesses)
- Builds and strengthens **relationships with local businesses**
- Results in **targeted support to local businesses** and strengthens broader economic climate
- Research to support local and regional economic development **planning and collective action**

What resources are needed at a local level?

- \$ to support **follow up actions** to help successful 'follow-up'
- \$ or in-kind contributions to cover **administrative costs** (office space, phone, postage, photo copying, room rental, etc.)
- **Human resources** – \$ for a researcher / coordinator, project committee to support implementation & follow up, other support organizations

What resources are available?

- **Training, tools** (manual, readiness checklist) **and research support** from Rural Development Institute
- **Lessons learned and implementation advice** from the RDI and other BRE communities across the region
- **Access to BC Business Counts Provincial Program** and e-pulse client management system
- **Potential funding support through CBT** – talk to your CBT liaison
- **Implementation & Follow-up support** from economic development and educational / training organizations

What results can be expected?

- An **improved understanding of the needs** of and **collective challenges** of your local business community
- **Research** in place that best positions you to **respond to individual business needs AND informs economic development planning** and action
- **Improved cooperation** between key stakeholders (businesses, Chamber, EDC, local government, support organizations)
- **Connection to regional research, plans** and related strategic actions

Why is the RDI involved?

- Opportunity to standardize data collection and analysis across communities – allows for regional & sector specific analysis and planning
- Need to provide research support in terms of design, collection and analysis
- Opportunity to provide communities with tools to support successful implementation and follow up
- Opportunity to connect to available resources and broker necessary partnerships

Regional 3 Year Pilot Project

- Regional case study research
- Regional advisory, best practice research & evolving regional model
- Development & refinement of:
 - training & support materials for BR+E researchers & community partners
 - implementation framework and related processes
 - analytic & reporting framework
 - metrics to measure local and regional impact
 - related indicators to link to State of the Basin initiative
- Brokering resources & training to support community-level implementation
- Provision of a standardized tool, analysis support & ‘regional questions’
- Implementation in 2 communities & regional sector-specific BR+E (year 1)

How do we know if we are BRE ready?

- Do we have a core group who understand BR+E and will commit the time to champion local implementation? (including CF, local government, Chamber, EDO or ED group)
- Do we have an established volunteer base with the ability, willingness and time to be active participants in the process?
- Do we have adequate financial resources to carry out a BR+E?
- Are we committed to follow-up on recommended actions and links to planning?

The Ohio Business Retention and Expansion Initiative:
<http://www.youtube.com/watch?v=sgPeot4szk4>

IMPLEMENTING THE BRE PROJECT

- Roles & Responsibilities
- Timeline & Implementation Stages
- Communications
- Research to Action
- Scenario Exercise



“The future of every community lies in capturing the passion, imagination and resources of its people.” Ernesto Sirolli

Organizational Structure

BRE Regional Advisory Group

**Rural Development
Institute**

**Local Steering
Committee**

Local BRE Lead

**BRE
Researcher /
Coordinator**

REGIONAL

LOCAL

Roles & Responsibilities

RURAL DEVELOPMENT INSTITUTE

- Protection of data and management of regional database
- Coordination of regional BRE advisory
- Development of BRE implementation tools
- Customization of survey, data analysis and report writing
- Community presentations (research findings)
- Regional case study research

LOCAL STEERING COMMITTEE

- Overall planning and strategy
- Acquiring necessary resources (human & financial)
- Public relations
- Interviews with businesses (in some cases)
- Follow up short and long term actions

Roles & Responsibilities

LOCAL BRE LEAD

- Protection of data
- Interviews with businesses
- Red flags and referrals
- Supervising research assistant / coordinator
- Regional BRE advisory group

BRE RESEARCH COORDINATOR

- Coordination & communications
- Support to steering committee (protocols , using e-pulse)
- Data collection and data input
- Red flags and referrals to BRE lead

BRE Implementation Timeline

Month 1	Month 2	Month 3	Month 4	Month 5	Month 6 +
Assessing Readiness	Getting Ready	Implementation	Implementation	Analysis	Reporting & Follow Up
<ul style="list-style-type: none"> Find champion(s) Organizational committee formed (with terms of reference and clear roles) Establish goals, objectives and expectations Contact Selkirk College RDI Orientation presentation by RDI Review manual Assess readiness of business community Review Checklist Finalize timelines and critical dates Secure resources as necessary 	<ul style="list-style-type: none"> Draft Public relations plan Hire Research Assistant / Coordinator Identify BRE Lead Attend training Sign confidentiality and data sharing agreements Select sample for surveying Review and modify survey as local and regional issues and needs require Kick-off press release Letters to businesses Begin scheduling interviews 	<ul style="list-style-type: none"> Kick-off BRE implementation Interview businesses Input data Red Flags and immediate action for things requiring it (e.g. business relocating) Review and resolve initial problems or issues Implement public relations strategy Immediate actions as required 	<ul style="list-style-type: none"> Interview businesses Input data Red Flags and immediate action for things requiring it (e.g. business relocating) Implement public relations strategy Immediate actions as required Final push for surveys 	<ul style="list-style-type: none"> Data Analysis (RDI) Data clarification as requested by RDI Steering Committee to review draft report Thank you letters to participating businesses and invitation to focus group Focus group with businesses to validate and further clarify findings 	<ul style="list-style-type: none"> Release final report Presentation to council, business community & community Press release with key findings & recommendations Short and long-term actions strategized & finalized <p style="text-align: center;"><u>ONGOING</u></p> <ul style="list-style-type: none"> Short and long-term actions implemented BRE integrated into economic development and community planning Evaluation

Red Flags

Urgent short term situations that require immediate attention,
such as:

- Possibility of a business closing
- Possibility of a business leaving the community
- Possibility of a business downsizing

Don't make any promises or raise expectations that
the issue will be resolved!

Green Flags

Short term opportunities that require immediate attention, such as:

- Expanding but need help to overcome barriers (i.e. finding a site to accommodate expansion)
- New ownership pending but no succession plan
- Common training needs across businesses
- Employee recruitment challenges and skills needed

Don't make any promises or raise expectations that the issue will be resolved!

Data Protection & Research Protocols

CONFIDENTIALITY AGREEMENT

- All researchers must sign confidentiality agreement
- Forward a copy of confidentiality forms to RDI & bring a copy to interviews
- Agreement states Researcher will not share any information gathered resulting from interviews (exception is red flags and referrals to BRE Lead)

CONSENT FORM

- Data will not be used or shared in a way that identifies individual companies
- Selkirk College RDI researchers, the Local BRE Lead and Executive Director of EDABC are the only individuals what have access to company level data (all have signed confidentiality agreements)
- Data is stored on a U.S. server subject to the Patriot Act
- Local BRE Lead will contact business directly if it has been identified additional follow up support may be required
- No referrals to other agencies or groups will be made without the approval of the business

Data Protection & Research Protocols

DATA SHARING AGREEMENTS

- RDI enters into data sharing agreements with communities
- Agreement ensures data will not be shared in a form that identifies individual businesses
- RDI will follow protocols outlined by the Selkirk Ethics committee (i.e. secure storage of data, handling of data requests, etc.)

Moving from Recommendations to Action

Short Term Actions

- Can be completed in 6 months or less
- Pick visible projects and 'low hanging fruit'
- Evaluate and secure necessary human and financial resources
- Ensure people know your successes
- Report back to businesses in a variety of ways

Long Term Actions

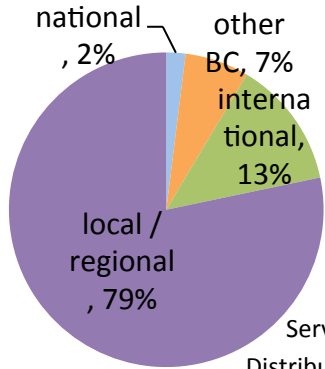
- May take between 1-2 years
- Evaluate and secure necessary human and financial resources
- Aim to integrate into economic development strategy (or become the foundation for ED strategy / plan)
- Project can also assist with OCP or other community planning

Communications Considerations

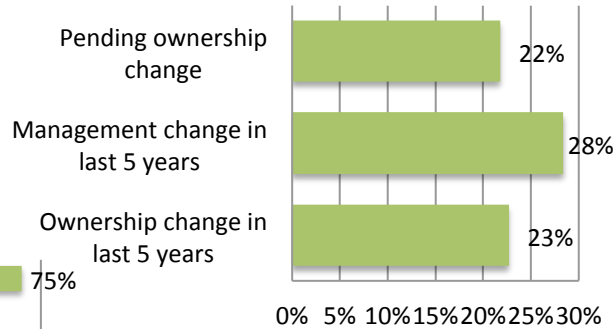
- Develop a clear plan prior to project launch
 - Identify key stakeholders (i.e. business, local government, broader community)
 - Identify communication tools (press release, e-newsletters, website, etc.)
 - Identify goals (i.e. raise awareness, secure broad based support)
- Base communications plan on key milestones
 - Launch
 - Findings and Recommendations
 - Identified Actions
 - Follow up on Identified Actions

Companies: Long time in Business, No Exit Plan with Local Competitors

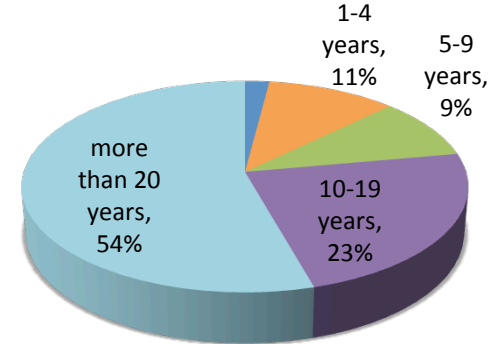
Location of Competitors



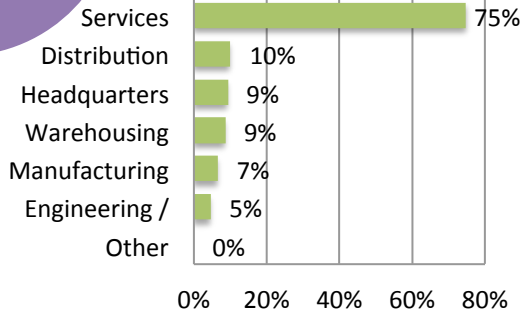
Changes in Ownership and Management



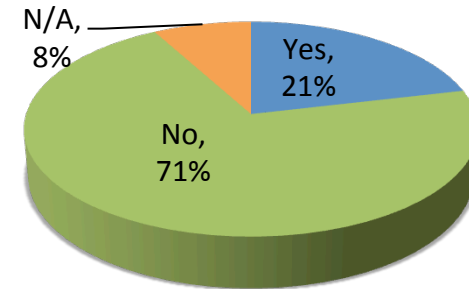
Length of Time in Business



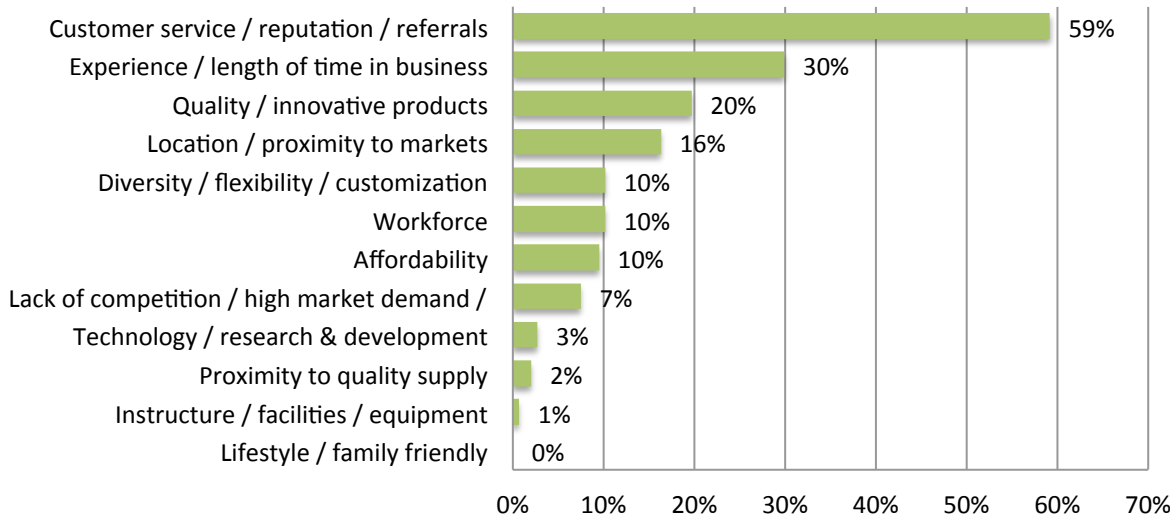
Facility Functions



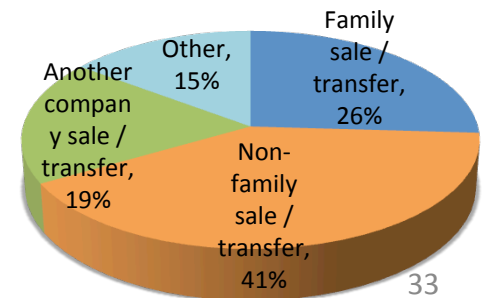
Formal Succession Plan



Business Success Factors

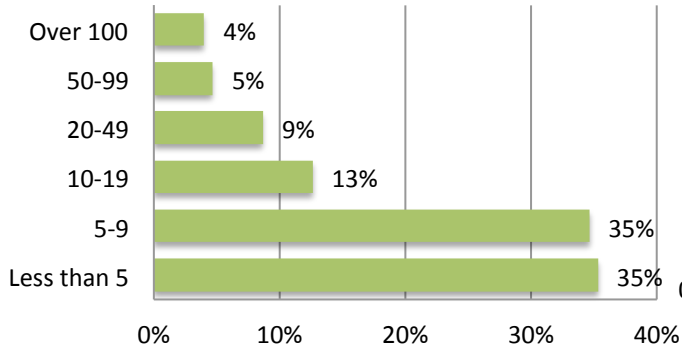


Anticipated Exit Strategy

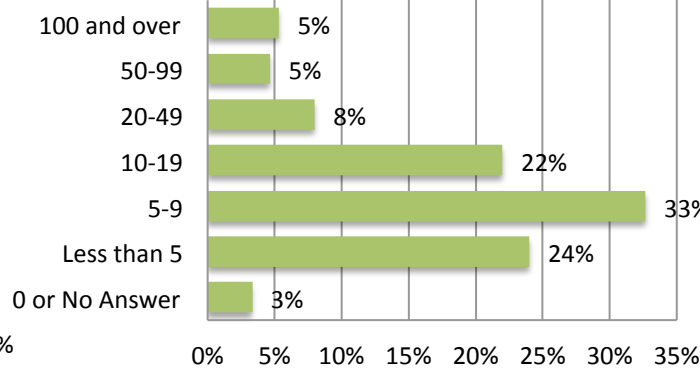


Workforce: Majority Full Time & Skilled with Positive Employment Trends

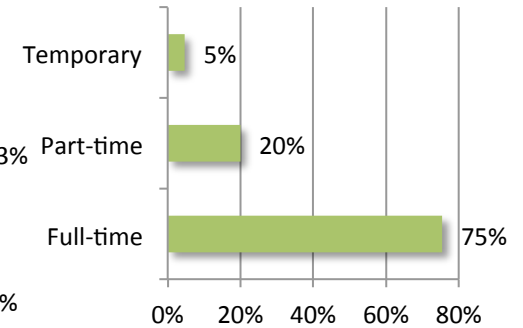
Total Number of Employees



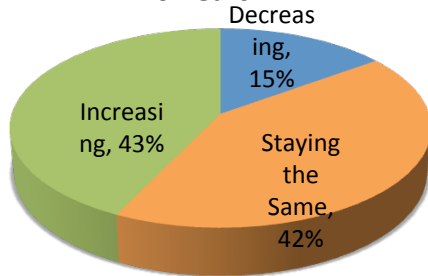
Projected Employees in Three Years



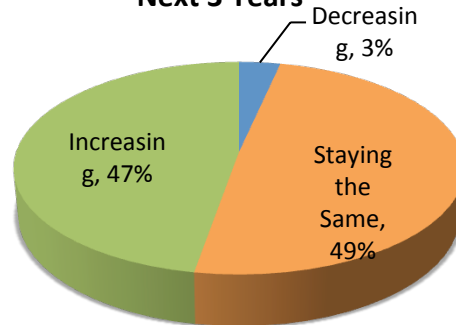
Nature of Employment



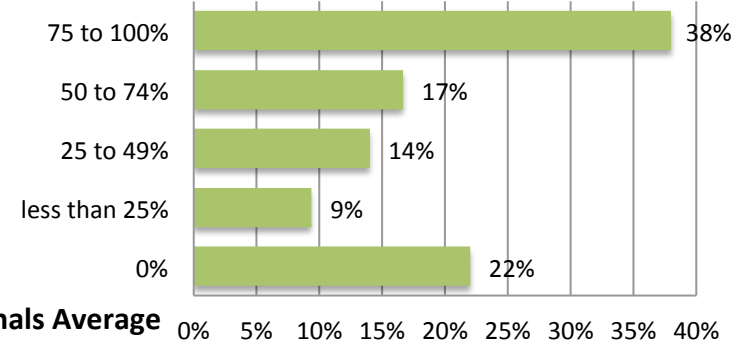
Employment Trend Over Last 10 Years



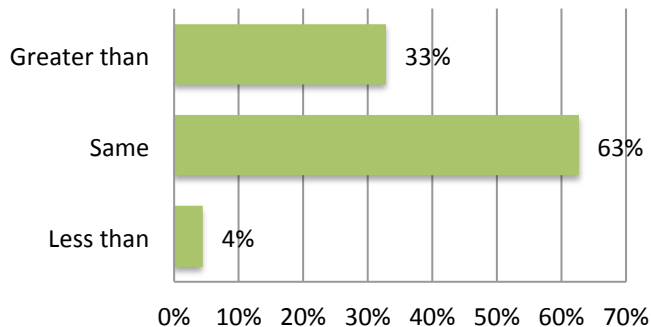
Full-Time Employment Trend Over Next 3 Years



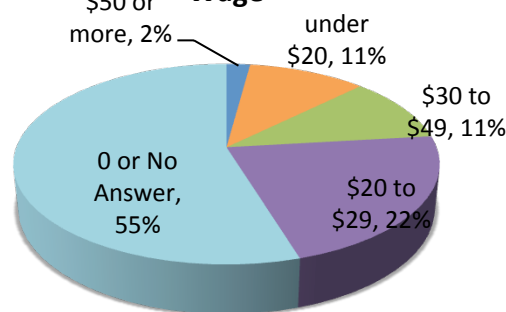
Skilled / Professional Employees as % of Workforce



Wage in Relation to Other Businesses in Region

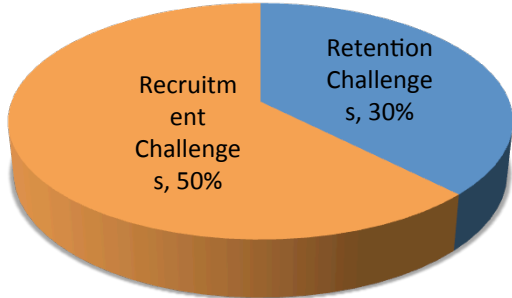


Skilled / Professionals Average Wage

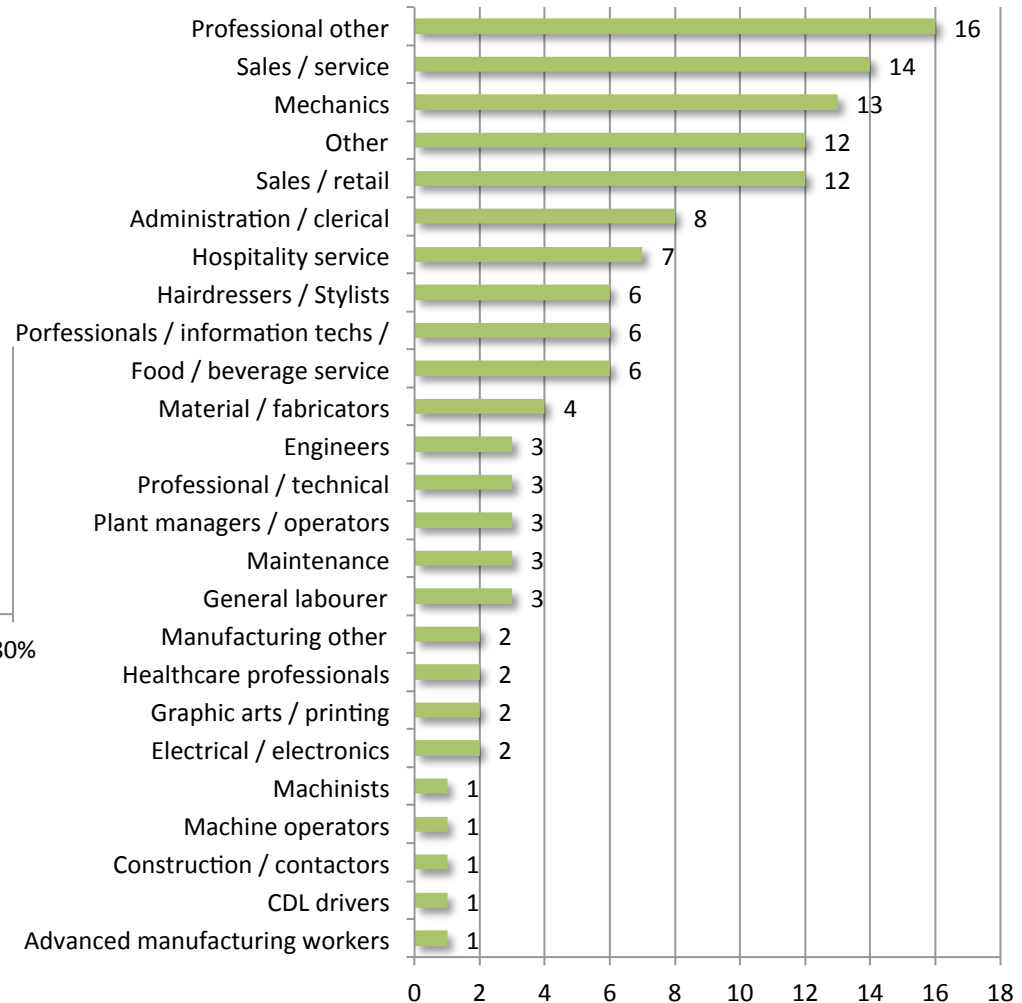


Recruitment & Retention: Recruiting Mechanics & Sales / Services

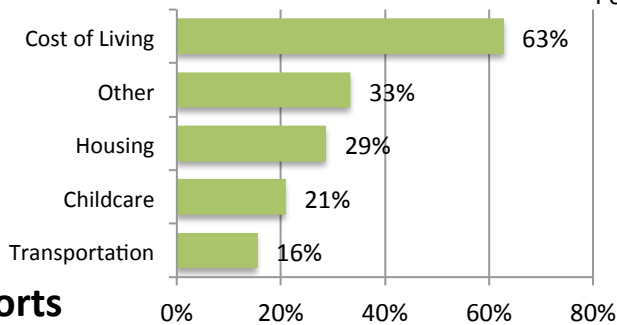
Retention & Recruitment Challenges



Current Recruitment Challenges



Critical Considerations for Employees

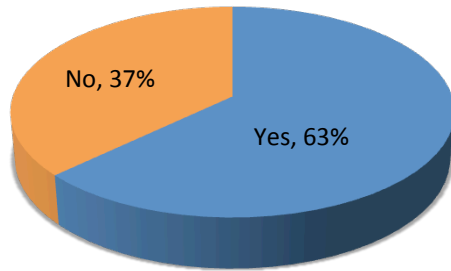


Retention Efforts

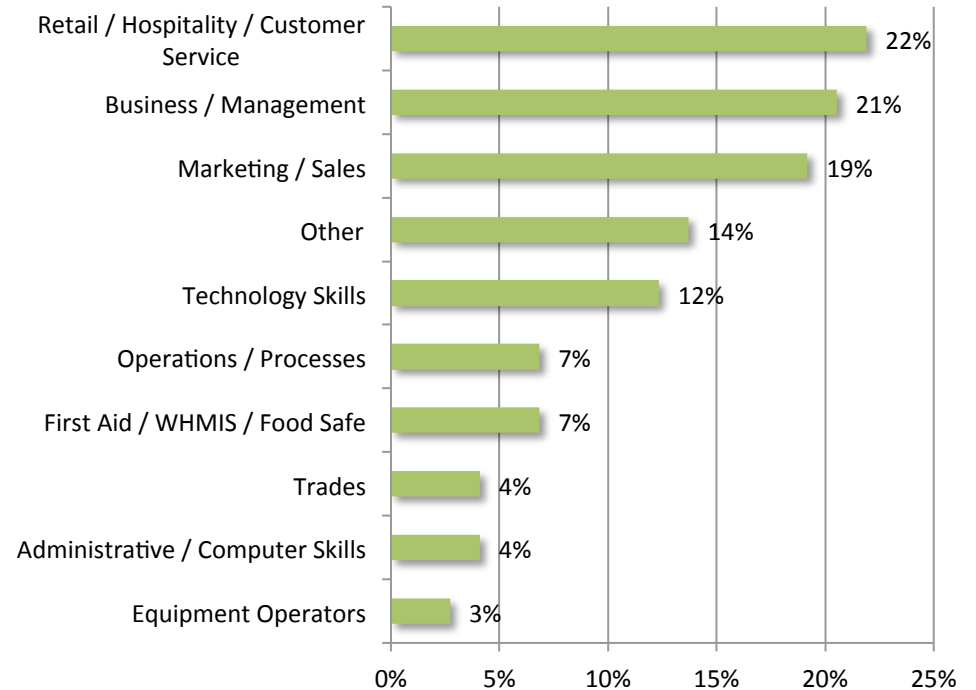


Training: Have a Budget, Hospitality & Business Management Needs, & Sourcing Elsewhere

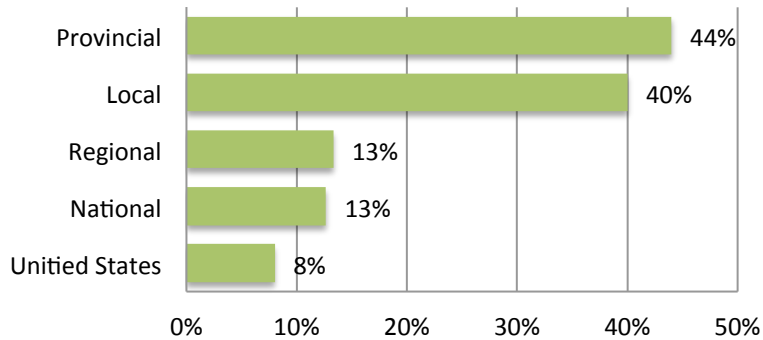
Training Budget



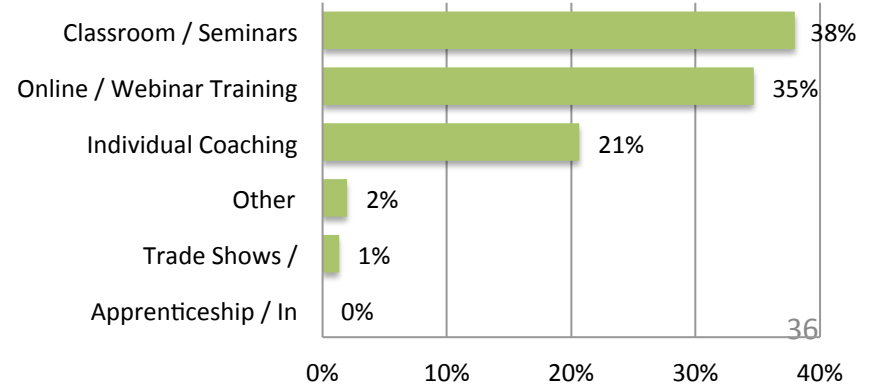
Professional Development Needs



Location of Training

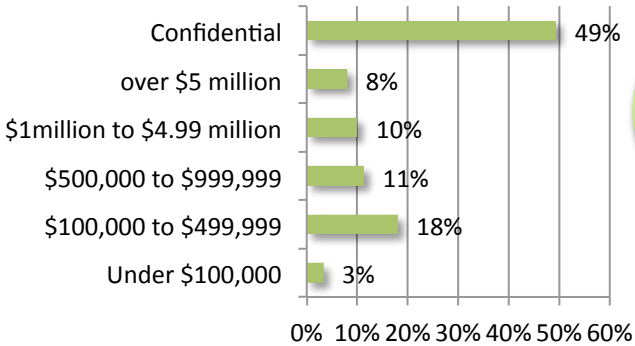


Preferred Education / Training Delivery Mechanisms

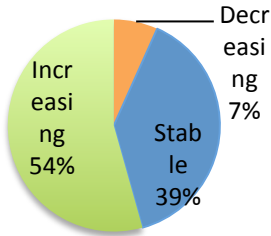


Sales: Relying on Local Markets and Sourcing Supplies Elsewhere

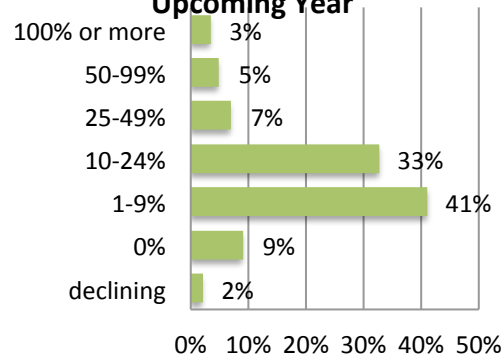
Annual Sales



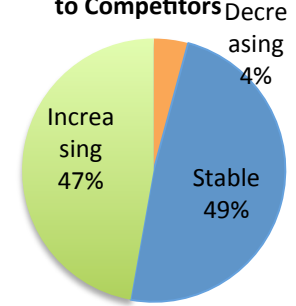
Market Share



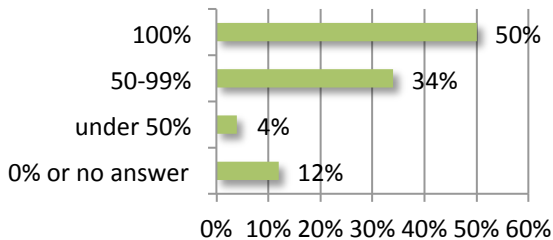
Projected Sales Growth in Upcoming Year



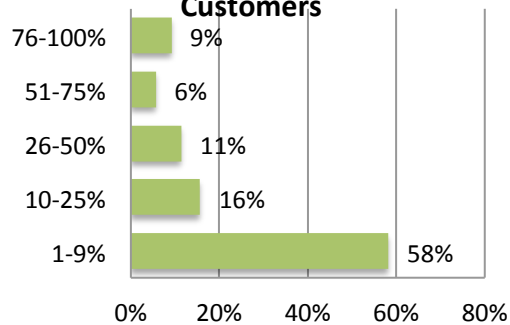
Market Share in Comparison to Competitors



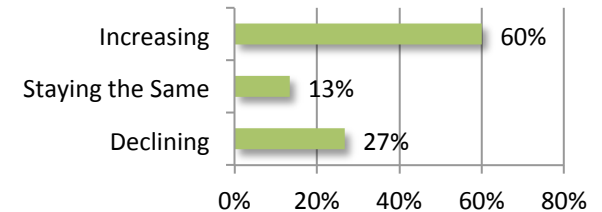
% Source of Sales Local/ Regional



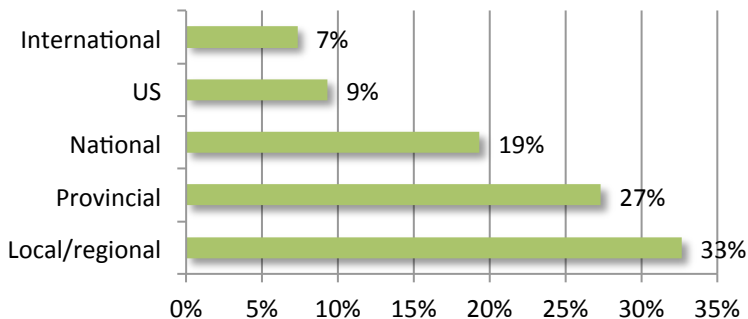
% Sales Generated by Top 3 Customers



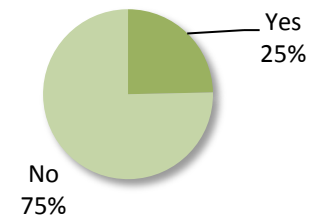
Export Sales Trend



Geographic Source of Majority of Supplies

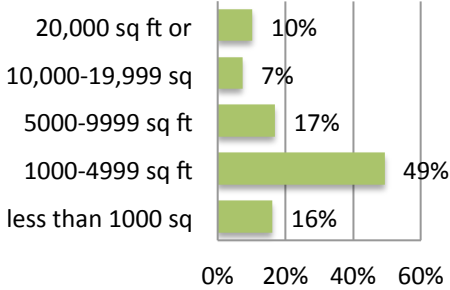


Engagement with Government Procurement Processes

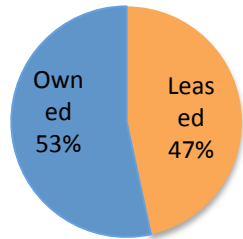


Facilities & Expansion Plans: Good Condition of Facilities & Equipment & Plans to Invest in Expansion

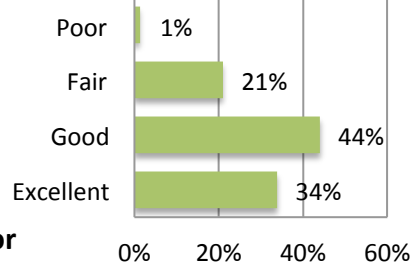
Facility Size



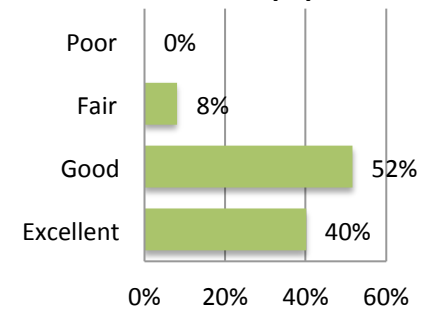
Facility Status



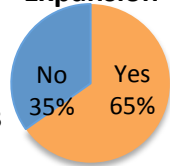
Condition of Facility



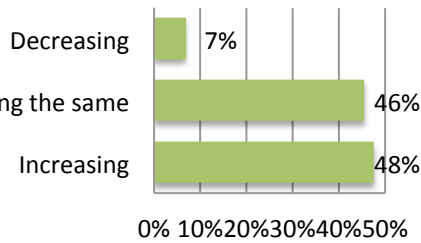
Condition of Equipment



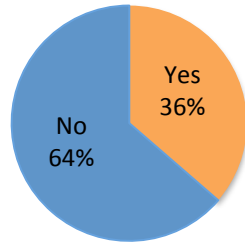
Adequacy of Current Site for Expansion



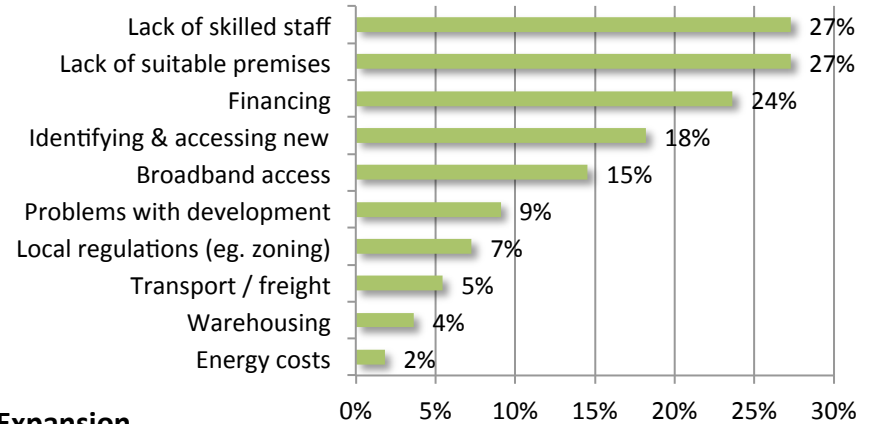
Investment in Facility (Past 18 months)



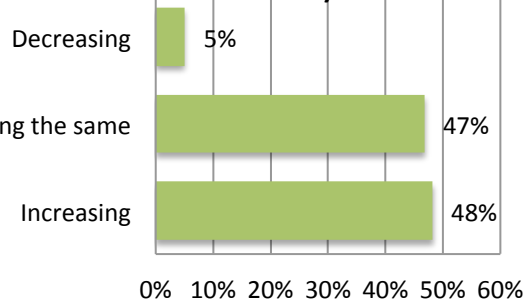
Expansion Plans



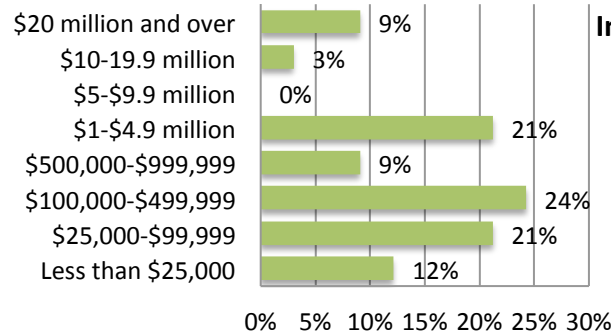
Barriers to Expansion



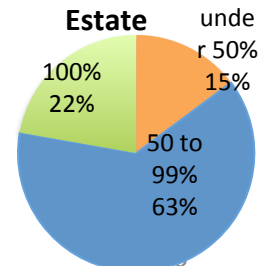
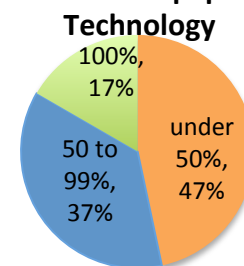
Investment in Equipment (Past 18 months)



Total Investment in Expansion

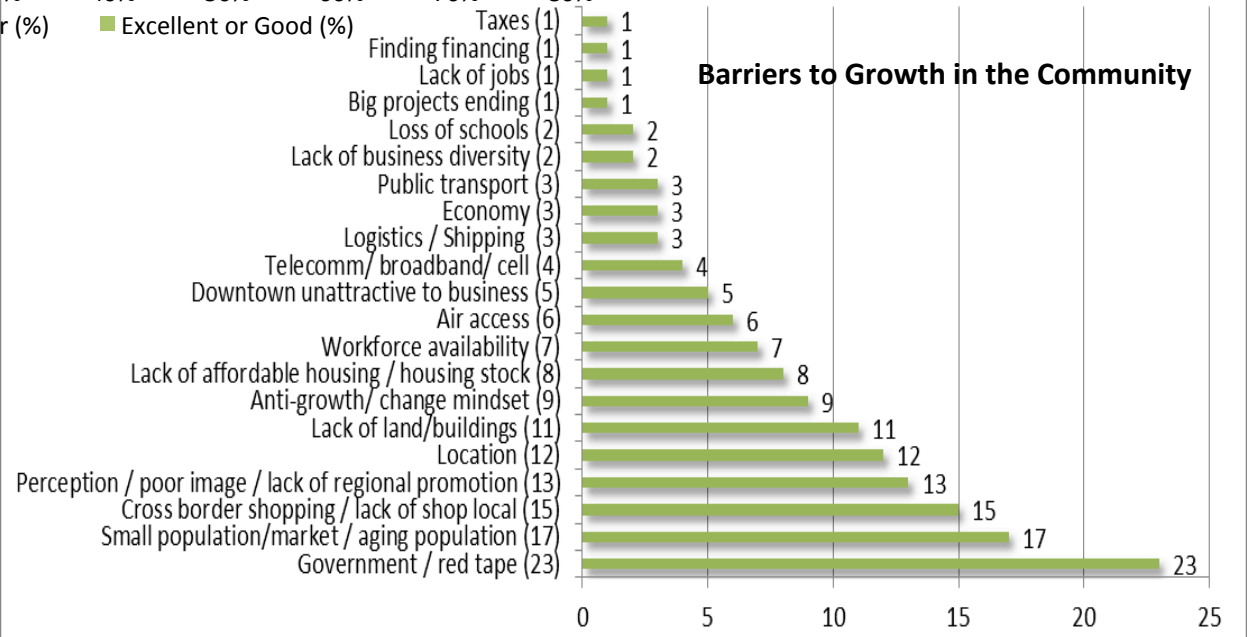
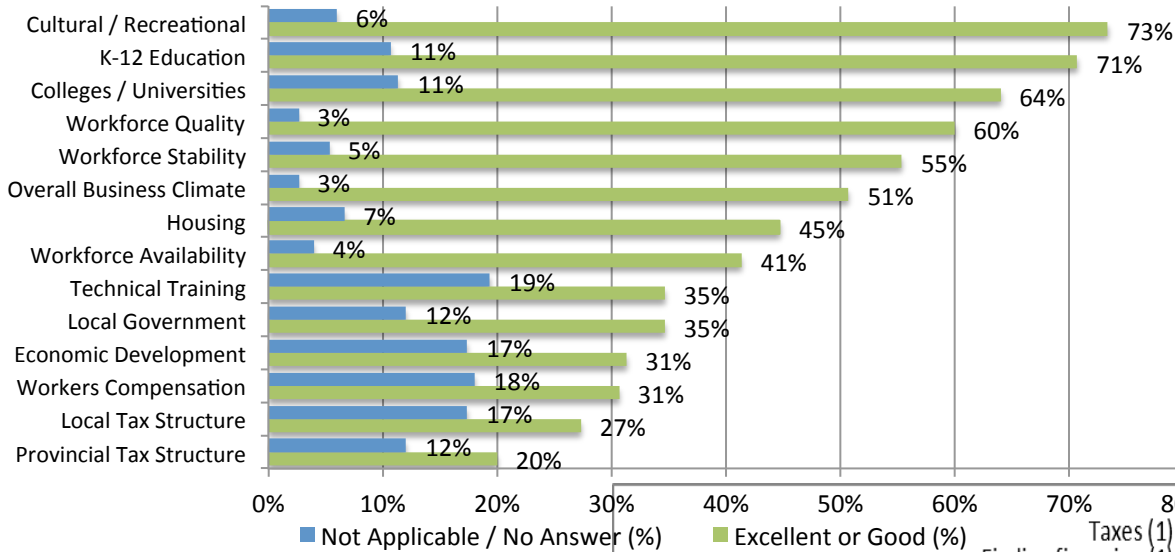


Investment in Equipment & Investment in Real Estate



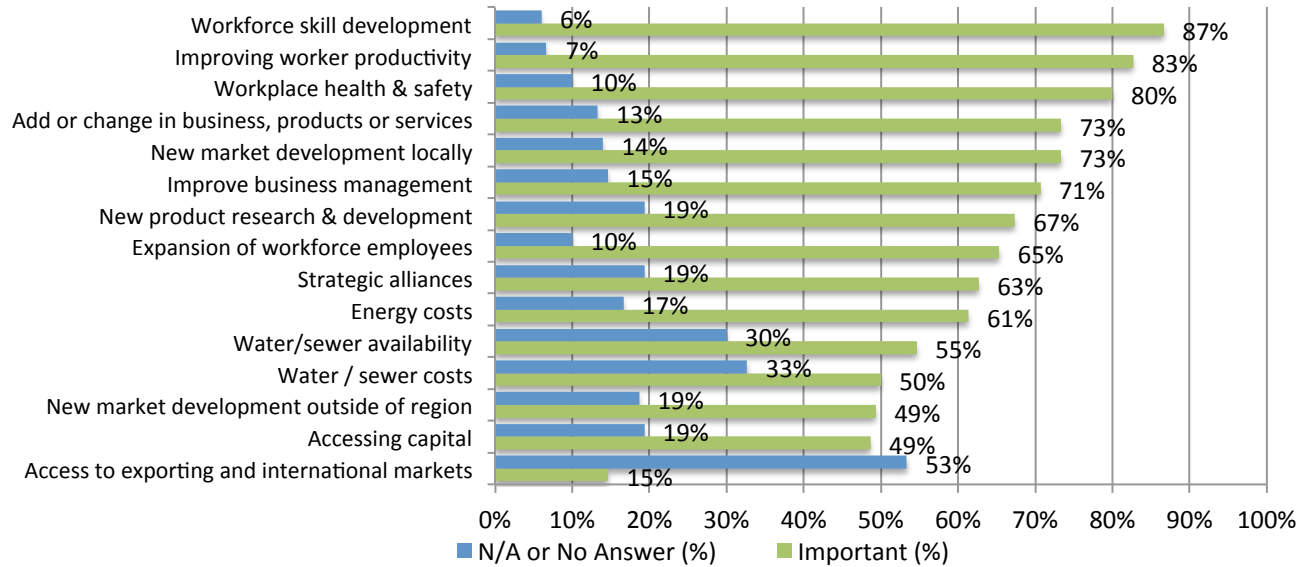
Business Climate: Schools and Lifestyle Amenities are Business Climate Assets

Business Climate Factors Rating



Competitiveness & Productivity: Tourism, Amenity Migrants, Technology & Manufacturing have Potential but Skill Development is Needed

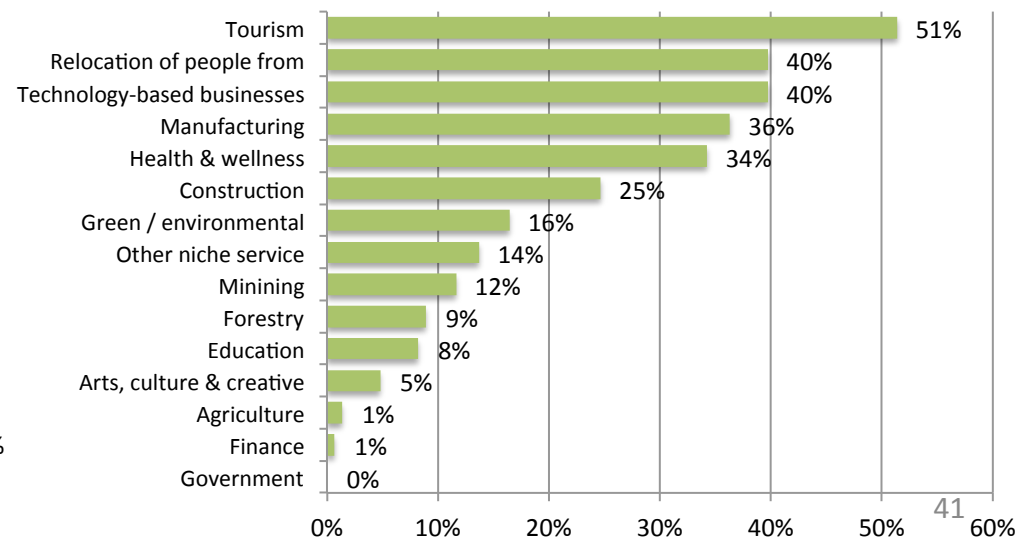
Business Competitiveness Factors Rating



Productivity Drivers



Economic Drivers with Potential for Future Development



Lower Columbia: Key Themes & Recommendations

- **Site selection support for expanding businesses** → helping identify potential sites and streamline approval processes
- **Supply Sourcing and Buying Local** – 84% sell primarily to local markets, 30% source supplies out of region -> connect businesses to relevant suppliers
- **Accessible, Relevant & Affordable Training** → based on identified needs, consideration of schedules & training budgets, & collaborative approach
- **Recruitment and Promotion** – recruitment needed for mechanics and sales / service personnel -> attract workers from out of region and feature amenity assets
- **Succession and Business Planning** – plans not up to date -> targeted one on one support, attention to at-risk businesses

Boundary: Key Themes & Recommendations

- **Site selection support for expanding businesses** → helping identify financing and streamline approval processes
- **Supply Sourcing and Buying Local** – majority sell primarily to local markets while sourcing supplies from elsewhere-→ connect businesses to relevant suppliers
- **Accessible, Relevant & Affordable Training** → based on identified needs, consideration of schedules & training budgets, & collaborative approach
- **Recruitment and Promotion** – recruitment needed for maintenance & hospitality personnel -> attract workers from out of area and feature amenity assets
- **Succession and Business Planning** – plans not up to date -> targeted one on one support, attention to at-risk businesses

Manufacturing & Technology BRE: Key Themes & Recommendations

- Increasing & improving training
- Regional promotion – internally & externally
- Facilitating planned business expansion
- Upgrading telecommunications infrastructure
- Boosting R&D
- Readyng companies for export and increasing out-of-region sales
- Recruiting and retaining skilled employees
- Upgrading businesses energy efficiency
- Fostering greater networking & collaboration

What type of recommendations have been generated in other communities (Vernon)?



Recommendations

- 1) Review Local and Regional Government approval processes
- 2) Develop labour force recruitment Packages
- 3) Assist companies in recruitment process
- 4) Consider developing an HR website for use by companies seeking employees
- 5) Complete a Land and Facility Inventory
- 6) Complete a BR+E Program for other sectors
- 7) Introduce companies to BC Trade & Investment representatives in USA, Asia, and Europe
- 8) Create a Sector Alliance for Manufacturing

What type of follow-up actions can be expected?

Nelson

Technology/E-Commerce

- E-Business seminar
- Lobby to ensure issues at forefront (i.e. high speed Internet, education, politicians enshrined in process)
- High tech lure package

Training/Employment

- Retail Management (Selkirk)
- CF offering more courses
- Service Provider Trade Fair
- Reverse Trade Fair

What type of follow-up actions can be expected?

Nelson

Marketing & Local Pride

- Buy Locally Program
- 'Check it Out' self assessment business audit
- Training

Finance & Admin

- Banker's Forum
- Signage changes for parking
- Equity options
- City better at posting info

What type of follow-up actions can be expected?

United Counties of Prescott Russell

- **Problem**
 - Lack of communication between manufacturing sector
- **Action**
 - Manufacturers Network formed to improve communication
- **Outcome**
 - Greater dialogue between manufacturers
 - Import replacement opportunities identified and being implemented

What type of follow-up actions can be expected?

Rainy River

- **Problem**
 - Lack of broadband infrastructure for community
- **Action**
 - Survey identified the need for broadband
 - Partnership with First Nations for broadband infrastructure funding
- **Outcome**
 - Successful funding application for \$890,000
 - Broadband being provided in Rainy River District
 - Improved business environment

What type of follow-up actions can be expected?

Parry Sound

- **Problem**
 - Customer service, street signage and lengthy approval procedures identified
- **Action**
 - BR+E Committee offered Customer Service Training Course and provided input to signage by-law and development approval process
- **Outcome**
 - Better trained employees, more effective signage & approval processes

What type of follow-up actions can be expected?

Smith Falls & Perth

- **Problem**
 - Poor downtown image
- **Action**
 - Development of 'Street Smart' program, strategic plan for downtown development and waterfront feasibility study
- **Outcome**
 - Business Association more actively involved in downtown development
 - Downtown businesses investing in storefront upgrades (15 storefront projects to date)

<http://www.videodelivery.gov.on.ca/player/download.php?file=http://www.media.gov.on.ca/4b1e1de64406e35d/en/pages/text.html>

Small Group Scenarios

- Small Town Retailer
 - Light Industrial Manufacturer
 - Large Format Moving to Medium Density
-
- Family Owned Shop in Small Town
 - Social Enterprise
 - Largest Tourism Partner Might Shut Down

LESSONS LEARNED & MOCK INTERVIEWS



- **Lessons learned from the YEAR 1 pilots**
- **Research Methodology**
- **Interview protocol & guidelines**
- **Mock interviews**

Business Retention & Expansion

Purpose: To pilot a regional BRE partnership model and related implementation tools and supports, and to support economic development planning and decision making through the analysis of findings at local, corridor and regional levels.

- Data collection complete with first 3 pilots (Boundary, Lower Columbia, KAST / KRIC) with 336 businesses surveyed to date, including:
 - 59 Boundary businesses
 - 147 Greater Trail businesses
 - 82 Manufacturing & 97 Technology businesses in MATS data set
- Training delivered to 29 participants via 2 pilot training workshops, next workshop pilot planned for East Kootenay in the spring 2013
- Slocan Valley and Nakusp are confirmed 2013 pilots
- Boundary, Lower Columbia & MATS reports to be released May 2013
- Focus groups with businesses may follow to validate & further inform findings and recommendations

Lessons Learned

- Businesses **do** want to talk
- It has been more about **green flags** than red
- Expect 4 hours from start to finish for each business
- The findings are **useful** in informing ED planning and do point to **concrete action**
- Context matters – process needs to be customized to meet the unique needs of each community

What challenges might we face?

- Limited time of organizers and businesses
- Participation of businesses
- Knowing who / where all the businesses are
- Ensuring strong methodology and data collection
- Referring follow-up action to someone not directly involved in the process
- Long term commitment

What are the critical ingredients to success?

- Strong & committed local **leadership**
- **Partnerships** – need support of local businesses, Chamber, EDC and local government
- Ensure BR+E **readiness**
- Human & financial **resources** are in place
- **Champions**
- Short-term **success**
- **Commitment** over the long-term (business appreciation events, follow up, ongoing technical assistance)

Research Methods: Sampling

- Identify the **purpose** of the project
 - To understand the business climate in general
 - To understand the businesses with the most growth potential
 - To understand a sector or sectors with the most potential
 - To understand major employers
- Identify the **geographic scope** of your project
 - Municipality only
 - Municipality and adjacent regional district area(s)
 - Corridor (i.e. municipalities and adjacent regional district area(s))
 - Regional District or Economic Region
- Identify **the businesses** in your ‘community’ & **scope** of project
 - Business license database (in municipalities only)
 - Steering committee to brainstorm list of businesses (RD areas)
 - Identify target number of businesses (minimum 35)
- **Random sampling**
 - Consider both sector and size of business

Research Methods: Survey & Data Collection

Survey Instruments

- Long survey
- Short survey
- Sector specific surveys (manufacturing, technology, professional services, agriculture, retail)

Data Collection Methods

- Structured interviews (in person and phone)
- Self-administered online survey
- Self-administered online survey at meeting
- Focus group to validate and further inform survey findings

Researchers

- BRE Lead
- BRE Research Coordinator / BRE Researchers
- Members of the steering committee

Data input

- Should be input by the researcher that collected the data within 2 weeks of interview

Research Methods: Interviewing

Pre-Visit

- Record available information in advance of interview
- Identify most applicable survey tool based on size and type of business
- Prepare interview package (survey, resource handout, copy of your confidentiality agreement, consent form)
- Review interview guidelines
- Review survey and make note of questions you know will not apply
- Assign a participant number to the business through coordinator

Pre-Interview

- Arrive on time
- Break the ice
- Review BRE purpose
- Provide hard copy of survey to business
- Review the skip it rule
- Review researcher confidentiality form and related research protocols
- Review and sign consent form

Research Methods: Interviewing

The Interview

- Ask every question exactly as worded
- Listen carefully
- Don't suggest answers
- Probe for completeness
- Ask for clarification if you do not understand
- Don't take offense
- Don't promise solutions

Recording

- Have a spare pen ready
- Take good notes in notes area at the end of each section
- Write clearly
- Paraphrase the result of a discussion

Research Methods: Interviewing

After the Interview

- Review survey responses for completeness and clarity
- Expand notes as necessary; add comments
- Identify Red Flag issues, urgent concerns or assistance required
- Complete red flag form and forward to BRE Lead
- BRE Lead to follow up with business on red flag within 2 weeks maximum
- Record participant number of cover page and all survey pages
- Enter data into e-pulse database
- Remove cover page and store in a locked cabinet
- Ensure surveys are stored in another location separate from the cover page

Mock Interviews

- Ask every question exactly as worded
- Listen carefully & never suggest responses
- Do not take offense to opinions & do not promise any solutions
- Probe — ask related questions and converse (ie. if a business has a complaint about a local service, find out how this is affecting the business)

Mock Interviews

- Do not press for a response (if the person is reluctant to respond, he or she may wish to “skip it.”)
- Do not disagree with the business owner — listen. If someone goes off on a tangent, listen and then mention that you are recording his or her concerns
- Follow the survey carefully—ask all questions, make sure responses add up to 100 percent, follow instructions in the survey
- Review the survey to be sure that it is complete

Mock Interviews

Interviewee to role play a business in your community that is either experiencing challenges or is experiencing an opportunity for growth

USING BC Business Counts E-Pulse System

- **Using e-pulse CMS**
 - **Creating user profiles**
 - **Data entry**
 - **Updating company profiles**
 - **Generating cross-referrals**
 - **Managing data**
 - **Generating reports**



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