



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?

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

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

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**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"/>

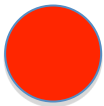
Water/sewer costs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reliable air transportation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Affordable shipping / freight	<input 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.

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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.

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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'.

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### 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)**

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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?

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

- housing    transportation    child care    cost of living    other (list)

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

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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 \_\_\_\_\_

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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)**

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49. Additional Comments related to 'Local Workforce'.

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**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.

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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)**

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**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'.

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## 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 _____	<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). (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:

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

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

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

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

Yes       No

If yes, what are they?

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

Yes       No

If yes, please list. \_\_\_\_\_

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

Yes       No

If yes, please list.

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

Better today     No change     Worse today     No opinion

If worse today, why? \_\_\_\_\_

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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'.

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## 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'.

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