

# THE BUSINESS EXPANSION AND

# RETENTION PROGRAM

**A FACILITATOR'S HANDBOOK**

***The B.E.A.R. Program has been developed as a community and economic development tool. It draws on the experiences of many organisations and community groups across the globe and especially within Australia, who have developed business expansion and retention strategies based on the recognition of the economic development importance of helping existing local businesses do better in terms of competitiveness and productivity.***

This B.E.A.R. Program Facilitator's Handbook has been compiled by: Peter Kenyon  
Bank of I.D.E.A.S.  
(Initiatives for the Development of Enterprising Action and Strategies)  
14 Bird Road, Kalamunda Western Australia 6076  
Phone: 08 6293 1848  
E-mail: [pk@bankofideas.com.au](mailto:pk@bankofideas.com.au) Website: [www.bankofideas.com.au](http://www.bankofideas.com.au)

### **Disclaimer**

***While this Handbook has been developed in good faith, the contents may not take into account all the factors that need to be considered before implementing a B.E.A.R. Program. Accordingly, the Handbook should be used in conjunction with in-depth research and specific technical advice. The intent of this statement is to exclude liability for any opinions, advice or information.***

## **CONTENTS**

	Page no
<b>Introduction</b>	6
<b>Key Terms</b>	10
<b>Section 1      Program Overview</b>	11
a.    Goals and Objectives	11
b.    Program Process and Structure Overview	12
c.    Strengths of the B.E.A.R. Program	14
d.    Time Frame	15
e.    Key Players – Roles and Responsibilities	15
f.    The Survey Questionnaire	23
g.    Common Questions about the B.E.A.R. Program	27
 <b>Section 2      Guidelines for Implementation</b>	 30
A. Planning Stage	31
1.    Assessment of the level of community interest and support	31
2.    Formation of a local leadership team (Taskforce)	33
3.    Agreement about the scope and form of the B.E.A.R. Program	34
4.    Identification of resources including recruitment of Coordinator	35
5.    Promotion of the Program	35
6.    Identification of and contact with businesses to be visited	36
7.    Recruitment and training of community volunteer interviewers	37
 B. Visitation Stage	 43
1.    Implementation of a systematic visitation of	

local businesses	43
2. Immediate follow up regarding referrals and concerns	46
C. Analysis Stage	46
1. Analysis of survey results	46
2. Identification of 'red flag' issues and opportunities	47
3. Review of other information relating to local business life issues	47
4. Formulation of action plans to improve the community as a place to conduct business	48
D. Community feedback and action stage	49
1. Sharing of program results and outcomes	49
2. Implementation of action strategies	50
3. Ongoing review of Program and action strategies	51
<b>Section 3      Program tools</b>	<b>53</b>
1. B.E.A.R. Program Checklist	54
2. A Job Description for Community Volunteer Interviewers	56
3. Advertising Leaflet for Potential Volunteers	58
4. Community Volunteer/Business Matching Form	61
5. Tips for Effective Interviewing	62
6. Master Coordination List	64
7. Letter to Participating Businesses	65
8. Business Information Cover Sheet	66
9. Sample Survey Questionnaire	67
10. Follow-Up Suggestions and Red Flags	79
11. Example of Business Contact Record Sheet	80
12. 'Thank You' Letter to Participating Businesses	81
13. Formulating an Action Plan	82
14. Evaluation Sheet	83
15. Examples of Possible Press Releases	86
16. Business Grow Information Kit – Some Guidelines	89
17. Confidentiality Statement	90

<b>Section 4</b>	<b>Appendices</b>	<b>91</b>
1.	Community Economic Development – Possible Action Strategies	92
2.	Working with the Media	93
3.	Code of Practice for Volunteer Agencies	97
4.	Code of Practice for Volunteers	98
5.	43 Ways to Recognise Volunteers	99
6.	Action Planning Resources	100
7.	Examples of Economic Development In Action At The Local Level	105
8.	Conducting Effective Community Meetings	116
9.	Tips for Maintaining Community Interest & Involvement	119
10.	Summary of Recommendations from B.E.A.R. Programs	120
11.	Relevant B.E.A.R Program References and Websites	122
12.	Notes on the First Impressions Community Exchange	123
13.	Sample of a Consumer Survey	124
14.	Sample of a Community Assessment Survey	128
15.	Sample of a Resident Survey	132
16.	Sample of a Visitor Survey	134

## A. INTRODUCTION

***'There is nothing so powerful in all the world as an idea whose time has come'***  
*(Victor Hugo)*

Community and economic development is that sustained and united effort by the whole community to utilise their social, human, physical and financial resources to enhance their local economic and employment opportunities and their quality of life. It is about local people taking responsibility for their economic future. It involves identifying and harnessing community resources and opportunities to stimulate sustainable economic activity. It is about changing perceptions and choices regarding development options, community resources, markets, rules and decision making capacity. It is based on the simple premise that each community has within itself or within its grasp, considerable capacity and opportunities to influence it's social, economic and employment future.

Business development and job creation are key factors in developing healthy, sustainable and enterprising communities. Sustainable community economic and employment development does not occur from any 'quick fix' measures. It is usually the result of a mix of initiatives related to building upon a community's competitive advantages. There are six broad approaches that can be used to stimulate the local economy and job creation:

- retaining and expanding existing local business;
- encouraging new business establishment;
- attracting outside business, investment and resources;

- plugging leaks in the local economy;
- enhancing the job linking capacity of the community, and
- marketing the community.

(These strategies are elaborated on in Section 4:1)

In relation to business development, internationally, it is becoming recognised that communities need a C.A.R.E. strategy, namely –

- C** - creation
- A** - attraction
- R** - retention
- E** - expansion

While all strategies are important, research clearly shows the importance of the retention and expansion of the local businesses. The local existing business base is responsible for:

- creating between 60-80% of new jobs;
- providing most of the investment for new community economic initiatives and infrastructure;
- generating ideas about possible new businesses, and
- acting often as a catalyst for outside businesses to relocate or establish within the community.

***'70% of all investment in a region is driven by the businesses indigenous to the region. Therefore, a region's number one lever for encouraging growth is its existing people and businesses'***  
*(McKinsey and Company, Lead local, Compete Global, 1994)*

Thus a focus on local business expansion and retention is critical to any community's economic and employment stability and growth.

The Business Expansion and Retention (B.E.A.R.) Program is an action-orientated and community based approach to economic development. It represents a structured approach to

identifying and supporting the needs of a community's existing businesses. It is simply a gigantic community dialogue with owners and operators of local businesses about what helps and what hinders their business activities, and ideas they have to improve the local business environment.

Besides providing the mechanism for pinpointing the concerns, ideas and opportunities of local businesses, the B.E.A.R. Program ensures a platform for response. It also enables a community to demonstrate pro-business attitudes and practical support.

A healthy local economy and an improved business climate is the long term goal of the B.E.A.R. Program.

In summary, the B.E.A.R. Program allows the possible discovery of:

- a picture of local business health;
- local business needs and concerns;
- perceptions by local businesses about what prevents expansion;
- identification of any businesses considering relocation outside the community and their reasons;
- perceptions about government actions and what helps and hinders;
- opportunities for matchmaking between local businesses;
- current and future labour and market needs, and
- new ideas for improving the local economy and the business environment.

The ideas and issues reviewed through the community dialogue provide the basis for –



- actions / referral to address immediate requests and concerns; and
- the design and implementation of business and community development strategies and work plans

The potential benefits of the B.E.A.R. Program to the local business community include:

- knowledge that their community and local government values their presence, and is interested in their needs, concerns and ideas;
- an opportunity to vocalise complaints about any aspect of the local environment;
- referral to appropriate sources of information, advice and support programs;
- input into future local economic development decision making and action plans, and
- an opportunity for local business matchmaking and networking.

***All the historic evidence indicates that significant community development only takes place when local community people are committed to investing themselves and their resources in the effort. That's why you can't develop communities from the top down, or from the outside in.'***

*(John McKnight, John Kretzmann, Mapping Community Capacity)*

## **KEY TERMS**

This Handbook builds upon several key concepts. Their definition is consistent with those used by Business Expansion and Retention International Organisation\*.

### **Community and Economic Development:**

*That sustained and united effort by the whole community to utilise their social, human, physical and financial resources to enhance their local economic and employment opportunities and quality of life by building their capacity to adapt to, and benefit from global economic changes.*

### **Business Expansion and Retention:**

*Encompasses all community and economic development efforts aimed at helping local businesses survive and grow within the community.*

### **B.E.A.R. Program:**

*The B.E.A.R. Program is an action orientated and community based approach to economic development. It is a community sponsored initiative which involves the formation of a local Taskforce and use of a structured interview process by community volunteers to learn about the needs, concerns and ideas of local businesses. The suggestions and issues raised provide the basis for action to address immediate business requests and concerns as well as the development and implementation of community economic development action plans. The B.E.A.R. Program is a planning process for setting priorities for B.E.A.R. actions.*

\* Business Retention + Expansion International (BREI) is a non-profit, professional association of economic development practitioners who are working for the advancement of business expansion and retention as a community and economic development strategy. Their website is

 [www.brei.org](http://www.brei.org)

## **Section 1     PROGRAM OVERVIEW**

### **A.     PROGRAM GOAL AND OBJECTIVES**

#### **GOAL**

To stimulate local economic and employment development by expanding and retaining existing businesses.

#### **OBJECTIVES**

Short term:

- To mobilise and demonstrate community support for local business.
- To enhance the profile of businesses within the local community.
- To discover the concerns and issues perceived by local businesses.
- To encourage new ideas in terms of economic and employment development.
- To respond to immediate business concerns.

Long term:

- To enhance the competitiveness of local business.
- To identify windows of opportunity for new business creation, business growth, business matchmaking and networking.
- To establish and implement strategic action plans for economic development.
- To generate widespread community interest and involvement in local community and economic development.
- To create a broad based community coalition to sustain long term economic development efforts.

**The Golden Rule**

***"Business stays and expands where it is well treated and appreciated"***

## **B. PROGRAM PROCESS AND STRUCTURE OVERVIEW**

The successful establishment and implementation of a B.E.A.R. Program involves four recommended key stages and 16 recommended actions.

### **B.E.A.R. VISITATION PROGRAM PROCESS**

#### **a. Planning stage**

1. Assessment of the level of community interest, readiness and support for the program.
2. Formation of a local leadership team (Taskforce) to manage the program.
3. Agreement about scope and form of Program.
4. Identification of resources including recruitment of Project Coordinator.
5. Promotion of proposed Program.
6. Identification of, and contact with businesses to be visited.
7. Recruitment and training of Community Volunteer Interviewers.

#### **b. Visitation stage**

1. Implementation of a systematic visitation of local businesses using a structured interview and survey questionnaire.
2. Instigation of immediate follow up regarding referrals and concerns.

#### **c. Analysis stage**

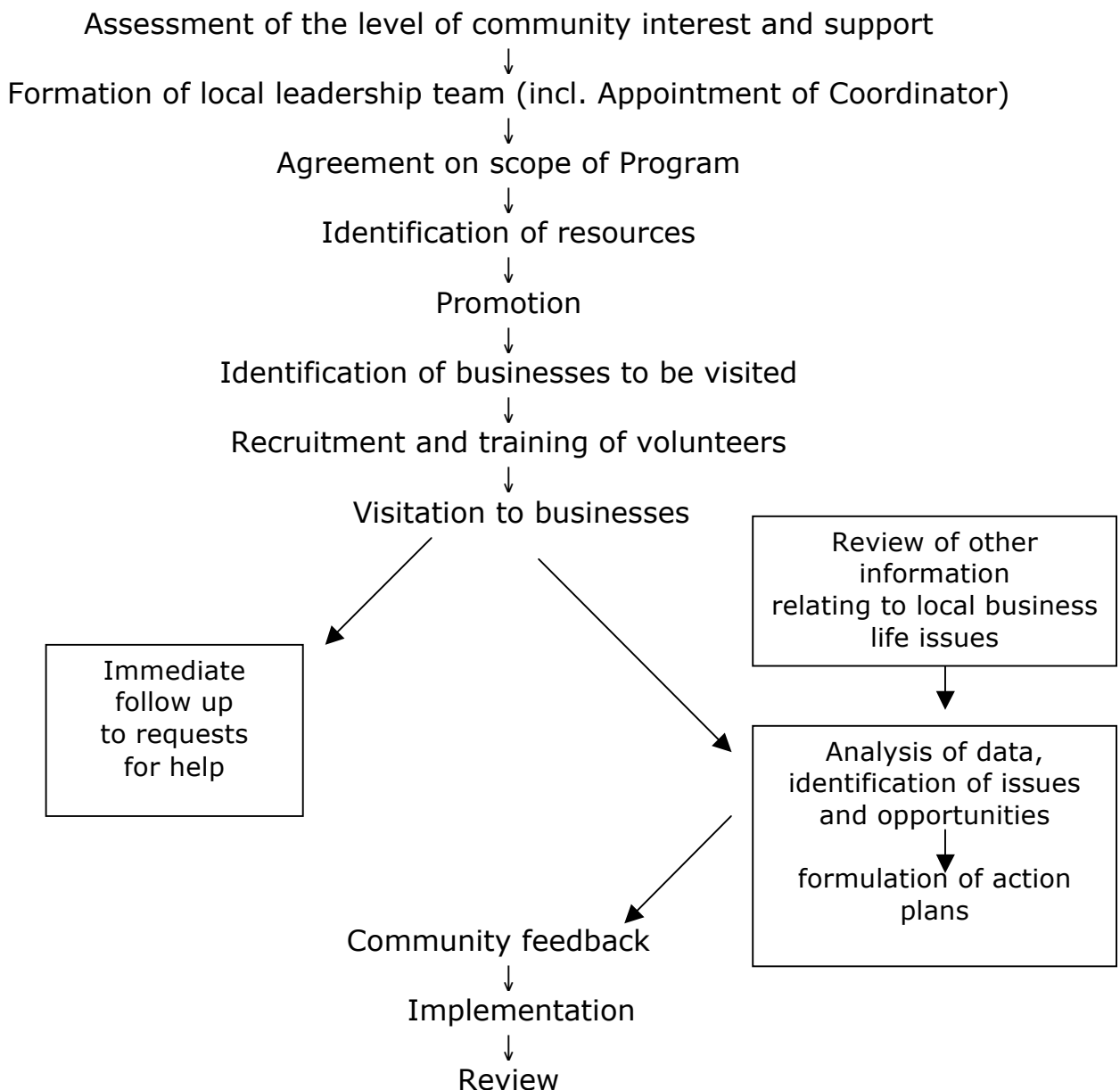
1. Data entry and computer analysis of survey results.
2. Identification of 'red flag' issues and opportunities.
3. Review of other information relating to local business life issues.
4. Formulation of action plans to improve the community as a place to do business.

#### d. Community feedback and action stage

1. Sharing of program results and outcomes via the media and at business and community meetings.
2. Implementation of action strategies - usually involves the formation of task teams.
3. Ongoing review of action strategies to assess impact and solicit feedback.

These stages are outlined in the following diagram.

#### **Flow diagram of B.E.A.R. Visitation Program**



### **C. STRENGTHS OF THE B.E.A.R. PROGRAM**

The growing international and national adoption of the B.E.A.R. Program is due to the unique set of strengths as a community and economic development tool. Its popularity is due to the fact that the Program:

- focuses on support for existing local business community;
- demonstrates a pro-business attitude by the local community;
- provides a structured approach to connecting with existing business community;
- raises the profile of businesses within the local community;
- responds to the perceptions of the local business community;
- plans for action to happen;
- enables the creating of an '*early warning system*' with follow up actions that respond to immediate business concerns, needs and requests;
- encourages innovative responses to concerns and opportunities;
- provides a strategic framework for action, both immediate and long term;
- broadens the wider community's awareness of, and involvement in community and economic development, and
- enhances community capacity and enthusiasm to become involved in other community and economic development initiatives.

## **D. TIMEFRAME**

The time from the initial convening of a Taskforce to the finalisation of the economic development action plans usually involves four to nine months. The actual visitation phase ideally needs to occur within a defined two to four week period. However, this timetable may vary depending on local needs, expectations, numbers of volunteer interviewers and resources.

## **E. KEY PLAYERS: WHO IS INVOLVED: ROLES AND RESPONSIBILITIES**

Experience has shown that the success of the B.E.A.R. Program depends upon the identification, involvement and performance of certain key players, namely:

- Project Sponsor(s)
- Taskforce
- Project Coordinator
- Community Volunteer Interviewers
- Trained B.E.A.R. Facilitator.

### **(i) PROJECT SPONSOR(S)**

Sponsor(s) may come from any group with an interest in the employment and economic future of the community. Sponsor(s) commonly include one or more of the following:

- Local and regional economic and employment development agencies, eg, Regional Development Commissions, Area Consultative Committees etc.
- Local government councils
- Business Enterprise Centres
- Community development organisations
- Service clubs
- Chambers of Commerce
- Progress Associations

The Sponsor(s) has the responsibility to:

- provide or arrange financing;
- help provide or recruit Taskforce members (see below );
- provide support including appointment of Project Coordinator, and
- promote the concepts of business expansion and retention, and the B.E.A.R. Program in particular.

***'Big things happen when lots of people do small things differently'***  
*(John Theobald)*

## **(ii) THE TASKFORCE**

***'Never doubt that a small group of thoughtful, committed citizens can change the world – indeed, it's the only thing that ever has'.***  
*(Margaret Mead)*

The Taskforce is the local leadership team responsible for introducing, promoting and implementing the B.E.A.R. Program. It is important that such a group:

- represent key stakeholder groups within the local community, eg, local council, Chamber of Commerce, tourism body, Business Enterprise Centre, Area Consultative Committee etc;
- comprise individuals respected for their knowledge of, and contribution to the local community. They need to have an ability to think and act strategically, act as a local champion for the Program and contribute to the strategic planning;
- appreciate the importance of the project, and are willing to give the necessary time commitment (which usually involves a minimum of six meetings), and
- able to exercise and respect confidentiality.



The Taskforce should be small enough to ensure efficient decision making and guard confidentiality, yet large enough to cover the responsibilities.

The Taskforce's primary responsibilities are management, follow up and implementation of action. Thus, the Taskforce needs to be involved in key Program decisions relating to:

- community awareness, media and marketing;
- identification of resources;
- appointment of a Project Coordinator (see below);
- scope of the project ;
- work plan and timetable;
- survey questionnaire design;
- selection of businesses to be interviewed;
- volunteer recruitment and support;
- management of 'red flag' issues;
- recommendations;
- action plans; and
- management of feedback to businesses and the community.

Taskforce members may also:

- participate as Community Volunteer Interviewers (see below), and
- assume key roles to assist Project Coordinator, eg, chair the Taskforce, coordinate visitation, provide media liaison etc.

Recommended size for Taskforce is between 6-10 members.

### **(iii) PROJECT COORDINATOR**

The Project Coordinator's responsibilities may include:

- managing the overall coordination of the project. With the assistance of the Taskforce members, this needs to include:
  - developing the workplan;
  - recruiting and training Community Volunteer Interviewers (see below);
  - identifying businesses to be visited;
  - scheduling visits and interviews with local businesses;
  - identifying sources of business assistance;
  - compiling key information documents including a Program brochure and *Business Grow Information Kit*;
  - collecting surveys and guarding their confidentiality;
  - coordinating response to immediate business concerns and requests for assistance;
  - organising survey analysis and response strategy design;
  - instigating community and business meetings to share results and recommendations, and
  - facilitating implementation of recommendations.
- Promoting and marketing business expansion and retention concepts, and the B.E.A.R. Program.

Without doubt, the most critical role of the Project Coordinator is insuring that Community Volunteer Interviewers feel supported, needed and recognised.

It is desirable, the Project Coordinator has the following skills and experiences required for this task including:

- ability to support and encourage all project participants;
- experience in coordinating community projects;
- skills in planning, organising, designing, implementing and evaluating;
- strong communication skills;
- conflict resolution skills;
- a professional manner;
- ability to respect and exercise confidentiality, and
- time availability.

To adequately fulfil these functions will normally require the Project Coordinator to allocate two to three days a week. This amount of time may be reduced by allocating specific roles to Taskforce members, (eg, visitation coordination, media liaison, business follow up etc).

#### **(iv) COMMUNITY VOLUNTEER INTERVIEWERS**

***'Volunteers are so essential a part of the complex mechanism of our communities that without them the whole fabric of society would be placed at risk'***  
*(Sir Ninian Stephens)*

To undertake the survey interview, Community Volunteer Interviewers are recruited and trained. Volunteers are then paired into teams. Each Volunteer Team is usually responsible for visiting between four and six local businesses, though volunteers may be prepared and/or may be required to visit more.

##### **Definition of Volunteering**

***Volunteering is defined as an activity which takes place in not for profit organisations or projects and is undertake:***

- ***to be of benefit to the community;***
- ***of the volunteer's own free will and without coercion;***
- ***for no financial payment; and***
- ***in designated volunteer positions only.***

The primary objectives of the Community Volunteer Interviewer Teams are to:

- undertake a structured interview and dialogue with local business operators;
- demonstrate community interest and support for existing businesses;

- gather information about perceived strengths and limitations of the local business environment, and
- identify and describe special requests for assistance, or concerns that need prompt attention.

The principal role of the volunteer teams is to gather information, not to defend existing policies, programs or institutions, nor to promise or provide solutions to problems and concerns.

**The Golden Rule**

***At all times, avoid expressing your own opinion on an issue, and never criticise, confront or argue with the persons being interviewed.***

The role of a Community Volunteer Interviewer is not for everyone. It is important that volunteers have the following qualities:

- enthusiasm for the Program;
- reliability;
- commitment to local economic and business development;
- professional manner;
- knowledge of the local community;
- good communication, listening and recording skills;
- an ability to respect and exercise confidentiality; and
- willingness to work within project timeframe.

Finally, it is important in using volunteers that the following is adhered to:

- an acceptable volunteer Code of Practice is followed. Such codes for both volunteers and sponsoring group, developed by Volunteers Australia, are outlined in Section 4 of this Handbook. A local confidentiality agreement may also be developed and utilised;
- an adequate insurance cover is in place for volunteers. Many sponsoring groups may already have volunteer

insurance. If not, or in doubt, contact Volunteers Australia or the State Volunteer Centre; and

- efforts to ensure that volunteers feel valued and appreciated (see section 4: Appendix 5 – 43 *Ways to Recognise Volunteers*)

#### **Principles of Volunteering**

- ***Volunteering benefits the community and the volunteer.***
- ***Volunteering work is unpaid.***
- ***Volunteering is always a matter of choice.***
- ***Volunteering is a legitimate way in which citizens can participate in the activities of their community.***
- ***Volunteering is a vehicle for individuals or groups to address human, environmental and social needs.***
- ***Volunteering is an activity performed in the not for profit sector only.***
- ***Volunteering is not a substitute for paid work.***
- ***Volunteers do not replace paid workers nor constitute a threat to the job security of paid workers.***
- ***Volunteering respects the rights, dignity and culture of others.***
- ***Volunteering promotes human rights and equality.***

### **(v) TRAINED B.E.A.R. FACILITATOR**

The B.E.A.R. Program is based upon local ownership and involvement. However, each community has different challenges and resources. Some communities may require and have the resources to engage a B.E.A.R. Facilitator to act as coach to the team implementing the Program and to assist with:

- promoting the value of B.E.A.R. activities to the broader community;
- providing information about B.E.A.R. Program and other economic development strategies;
- training Community Volunteer Interviewer teams;
- compiling and analysing data;

- preparing findings and recommendations;
- identifying sources of assistance;
- facilitating the implementation of action plans, and
- communicating the outcomes to the business and wider community.

The concept of 'facilitator' is most apt. Dictionary definition of 'facilitation' is:

*'to make easy , promote, help forward an action or result, to remove difficulty, promote ease or readiness with aptitude, dexterity or fluency'.*

The roles as defined by the Bank of I.D.E.A.S. for '*facilitators*' are most relevant to the B.E.A.R. Program, namely:

- *'create an atmosphere of energy, excitement and optimism;*
- *demystify concepts, processes and strategies;*
- *coach and optimise the knowledge and expertise of participating groups and individuals;*
- *broker experiences, models, methodologies, networks and resources that may be relevant, and*
- *encourage collaborative efforts between relevant groups and networks'.*

It is advisable that such Facilitators have undertaken B.E.A.R. Facilitator Training Courses, organised by The Bank of I.D.E.A.S. and the Municipal Association of Victoria.

(For further information email: [pk@bankofideas.com.au](mailto:pk@bankofideas.com.au))

## **F. THE SURVEY QUESTIONNAIRE**

The *Survey Questionnaire* needs to be a tool that creates an interesting and valuable dialogue between the business manager/owner and the Community Volunteer Interviewers.

Information gathering is the primary objective of the Community Volunteer Interviewers. The success of the interview will depend upon:

- the quality of the *Survey Questionnaire*;
- the willingness of the business person to disclose information;
- the trust and confidence established and nurtured by the Community Volunteer Interviewers – obviously the business person must feel that their perceptions, concerns, suggestions and requests will be treated confidentially, and
- understanding of each question, and why it is being asked.

A sample *Survey Questionnaire* is included as a Program Tool within the Handbook (Section 3, no 9). It has been tested in a variety of community settings. However, it is important to:

- eliminate questions which are not locally relevant;
- add questions to cover local development priorities, and
- tailor questions to focus on specific business sectors, eg, retail, farming, tourism etc.

The sample *Survey Questionnaire* included in this Handbook is designed to obtain information about the following themes:

**a. Business Structure and History (questions 1-8)**

This section of the *Survey Questionnaire* provides the foundation for understanding the types of businesses being included in the study, and allows discovery of:

- business categories;
- degree of local ownership;
- business structures;
- length of business life;
- product/service areas, and
- perceived uniqueness.

**b. Employment Patterns and Concerns (questions 9-10, 23-26)**

This set of questions provide:

- insights into present and future labour market needs and expectations;
- perceptions about employee skills and attitudes;
- techniques used in recruiting employees, and
- difficulties being experienced in recruiting employees.

Obviously such information is invaluable in terms of identifying potential skill development programs, and in designing job linking strategies.

**c. Business Environment (questions 11-18)**

This set of questions enables the business manager/owner to assess the overall business environment, and comment on what they perceive as:

- key advantages and disadvantages of operating a local business in the community;



- constraints to future expansion – what is stopping them from doing better;
- forecasts about future production/customer levels;
- competition levels, and
- factors which would lift performance and competitiveness.

**d. Business Opportunities (questions 19-22)**

These questions seek to elicit information and ideas about:

- local matchmaking opportunities, and
- new business possibilities.

In particular, question 19 attempts to identify '*business purchasing leakages*' from the local community, and when linked to question 7 provides the opportunity for local business matchmaking.

**e. Business Plans (questions 27-29)**

These questions focus on any planned changes to business operation and locations. In particular, it does identify businesses which may be planning to relocate out of the community, and their reasons.

**f. Business Assistance Requirements (questions 30-34)**

These questions provide an opportunity for business owners/managers to identify:

- informational and educational requirements;
- technical assistance areas, and
- difficulties being experienced with specific government agencies.

**g. On-line question (question 35)**

This question provides feedback about the extent of on-line activities utilised by local businesses, and opportunities to

provide practical local assistance to expand their use of this marketing direction.

#### **h. Local questions (questions 36-39)**

These questions enable an opportunity for response about local business networking and development initiatives, and a final opportunity to elaborate on ideas about what can '*help local businesses do better*'.

#### **i. Helpfulness of the Survey (question 40)**

This final question provides an opportunity for feedback about the helpfulness of the *Survey Questionnaire*, the interview process and the B.E.A.R. Visitation Program.

It is important to create a Survey Questionnaire tool to reflect local needs, and include questions of special concern. However, the following should be noted:

- questions should be reviewed by people experienced in survey research and tested through practice interviews;
- avoid making the questionnaire any longer, add new questions by replacing existing questions, avoid exceeding a 42 item questionnaire; and
- avoid any questions that require disclosure about turnover or profit, as it will dramatically reduce enthusiasm for participation by business owners/managers.

Another survey is available from website of the Business Retention and Expansion Program of the Queensland Department of Tourism, Regional Development and Industry – [www.dtrdi.qld.gov.au](http://www.dtrdi.qld.gov.au)

## **G. COMMON QUESTIONS ABOUT THE B.E.AR. PROGRAM**

### **Question 1. *What is the B.E.A.R. Program?***

#### **Answer:**

The B.E.A.R. Program is an action orientated, community sponsored initiative which involves:

- the formation of a local Taskforce;
- use of a structured interview process by Community Volunteer Interviewers to learn about the needs, concerns, perceptions and ideas of local businesses, and
- the use of suggestions and issues identified during the interview as the basis for action to address immediate business concerns, as well as the development and implementation of community and economic development plans.

### **Question 2. *What will a B.E.A.R. Program achieve?***

#### **Answer:**

As a result of implementing a B.E.A.R. Program, communities can:

- demonstrate to local business that the community appreciates their contribution to the local economy;
- help local businesses with local concerns and problems;
- link businesses to appropriate business assistance programs;
- accurately assess the needs and perceptions of local businesses;

- establish agreement on feasible action plans for economic and employment development;
- better appreciate their local business environment and its challenges; and
- enhance community enthusiasm and capacity to become involved in other community and economic initiatives.

**Question 3. *What are some examples of outcomes of how the B.E.A.R. Program has worked in Australia?***

**Answer:**

Coorow, Western Australia (population 235) was the first town to implement a B.E.A.R. Visitation Program in Australia. From interviewing 45 businesses, nine major strategies were implemented covering town coordination, new business services, streetscaping, housing issues and business attraction.

Carnarvon, Western Australia (population 9061) from interviewing 78 businesses, implemented an action plan involving 39 recommendations.

Jobs East (an Area Consultative Committee based in East Melbourne) won an international award for 'best regional practice' for their B.E.A.R. Initiative. In 1998, they interviewed 1200 businesses across six municipalities and involved 90 volunteers. Action plans were produced in all six municipalities, and subsequently over 30 diverse projects have been implemented.

See Section 4, no 8 for a summary of recommendations from both Coorow and Carnarvon.

**Question 4. *Why use Community Volunteer Interviewers to undertake the visitation program rather than using paid employees or consultants?***

**Answer:**

Local Community Volunteer Interviewers are preferred to using paid employees/consultants for a number of reasons, namely:

- builds community connection and social capital;
- enhances community awareness of, and enthusiasm for its local businesses and local economy and local capacity;
- maximises the number of businesses visited;
- avoids defensiveness about local programs/services which paid employees could be responsible for;
- minimises the cost of the project; and
- builds partnership between schools, tertiary institutions, business associations and other community groups where volunteers may be sourced.

**Question 5. *Is the B.E.A.R. Program a suitable strategy for our community?***

**Answer:**

B.E.A.R. initiatives are vital for any community interested in building their economic and employment capacity. However, the B.E.A.R. Program is not for every community. For it to work, a number of pre conditions are vital, namely:

- community leadership interest in taking actions to strengthen the local economy and supporting the local business community;
- commitment to pursuing the total program from business visitations to implementation of action; and
- adequate human and financial resources to support the Program, especially in terms of Taskforce membership, a Project Coordinator and the required number of Community Volunteer Interviewers.

***'People cannot discover new oceans unless they have the courage to lose sight of the shore'***

*(Anon)*

***'When spider webs unite they can tie up a lion'***  
*(Ethiopian proverb)*

## **SECTION 2    GUIDELINES FOR IMPLEMENTATION**

The B.E.A.R. Program has been developed over a 30 year period and represents a useful tool for community and economic development. It has been tried and tested in a variety of communities across the globe. In Australia, programs have been implemented in communities from populations with less than 300 persons to an urban region containing over 750,000 residents. Programs have been implemented in four states of Australia.

Section 1:B above outlines a recommended Program process and a set of four stages and 16 action steps. Each of the action steps are deemed important in the overall process. However, in keeping with a key principle of community development, the B.E.A.R. Program must be viewed as a flexible tool, and each community must adapt it to their needs and unique circumstances.

What is vital in the process is the recognition that the B.E.A.R. Program is designed to make things happen within a community, and requires commitment to the total process, not just the visitation and consultation phases.

Below is a description of each of the recommended stages and action steps. Section 3, no 1 contains a useful checklist to accompany the recommended implementation process.

## **A. PLANNING STAGE**

### **1. Assessment of the level of community interest and support for the program**

***'You can change the future of your community or you can sit back and allow whatever happens to happen. You can create your own destiny. However, the cost is high. It means organising a group of people who are willing to give of their time and energy to make things happen. It means believing in yourself and your organisation. It means putting aside individual differences to work together for the good of the community. It means working together to decide what you want for the future and then working together to make it happen. You can do it. People are doing it'.***

*(Jack McCall, Small Town Survival Manual)*

Community readiness, commitment and approval for such a Program is essential. A sponsoring organisation(s) must:

- promote an awareness of the importance of business expansion and retention as a key economic development strategy, and the B.E.A.R. Program as a possible community tool. Promotion needs to be via a variety of means including:
  - addresses to key business, civic, community and service groups,
  - press releases to local media outlets, and
  - use of talkback radio programs;
- solicit feedback on the relevance of, and community interest in, the B.E.A.R. Program to their specific community;
- ascertain the degree of community support for such a Program including the likelihood of adequate:

- financial support;
- administrative support, and
- key personnel support and leadership (including suitable Taskforce members, Project Coordinator and sufficient number of Community Volunteer Interviewers).

In terms of assessing the level of community 'readiness' for the B.E.A.R. Program, the following are questions that the sponsoring organisation need to discuss and debate:

- Are there people in our community who could champion and manage this Program as members of a leadership team?
- Which organisation(s) within our community would be willing to take a lead role in providing support for such a Program?
- Is there a sufficient potential volunteer force in our community willing to support a visitation program?
- What is the attitude of our local government authority towards economic development and supporting the business community?
- Is there support for economic and employment development activities from a range of community and service organisations?
- Is there a history of successful community and volunteer projects in our community?
- Does our community and local government authority have a current and comprehensive economic and employment development strategy?
- Does our community have an overall vision of what and where it wants to be in the future?
- What actions are currently happening in our community to build a healthy and vibrant future?
- Do we have the resources (financial and human) to mount a complex project over an extended time?



## **2. Formation of a local leadership team (Taskforce) to manage the program**

The local Taskforce represents the local leadership team responsible for introducing, promoting and implementing the B.E.A.R. Visitation Program. Identification of the membership of such a group is an important early task for the sponsoring organisation(s). As outlined above in section 1E, members need to:

- represent key relevant stakeholder groups within the local community;
- be respected for their knowledge of, and involvement in the local community;
- be able to proactively contribute to the strategic planning;
- be able to respect and exercise confidentiality;
- act as passion champions for the Program, and
- appreciate the importance of the Project, and be willing to give the Project priority in terms of time and commitment.

Ideally, such a Taskforce needs to be small enough to implement the Program efficiently and effectively, and guard the spirit of confidentiality, and yet large enough to share the range of responsibilities (usually 6-10 members is ideal).

Often a B.E.A.R. Facilitator is invited to the community to provide an initial briefing to Taskforce members covering such topics as:

- concepts of business expansion and retention, and the B.E.A.R. Program;
- experiences elsewhere;
- ideas on recruiting volunteers;
- the B.E.A.R. Program process;
- importance and roles of the Taskforce;
- media and marketing;
- managing '*red flag*' issues;
- managing the community feedback process; and
- strategic planning processes.

### **3. Agreement about the scope and form of the B.E.A.R. Program**

An early decision of the Taskforce will be to determine the characteristics and foci of the Program, including agreement on:

- the business sectors to be covered, (eg. a general visitation program incorporating a survey of all business sectors, or focussing specifically on certain sector(s), such as manufacturing, retail, tourism, farming etc) or responding to challenges, eg, main street revitalisation;
- the number of businesses to be surveyed, (eg, all businesses in the community or a sample, usually 30-150). Obviously it depends greatly on the number of Community Volunteer Interviewers likely to be recruited;
- the visitation format, (eg, one off survey, regular visitation to same firms over a period of time (quarterly), annual event etc);
- the survey questionnaire content;
- allocation of roles;
- a 'beginning to end' action plan including major events of the Program and a timeline. It is important to set dates for accomplishment of key stages, including Community Volunteer Interviewers training dates, visitation span period and community meeting feedback date;
- the budget, covering such items as employment of Project Coordinator, printing, postage, training, survey tabulations, report compilation and presentation, community meetings, and services of trained B.E.A.R. facilitator; and
- other community economic development initiatives to gather supplementary information relating to local business life issues

### **4. Identification of resources including recruitment of Coordinator**

To mount a B.E.A.R. Program requires financial and human resources. The taskforce needs to determine a budget, and identify possible sources. A critical resource that needs to be identified is a Project Coordinator. As mentioned, a Project Coordinator is required for a minimum of three days a week over a minimum of four months. Sometimes this position can be made possible through a secondment or an existing community based worker assuming the role as part of their employment responsibilities. In some cases a community volunteer has been prepared to assume this role. However, the importance of this role and its time commitment cannot be underestimated. Usually it does require a person to be employed on a contract basis.

## **5. Promotion of the Program**

Once the form and scope of the Program are determined and a Project Coordinator appointed, it is important to communicate project details to the wider community, and the business community in particular. This should include the preparation and distribution of an attractive and concise brochure.

There are three aims to this promotion:

- create and maintain community interest in the Program initiative;
- recruit potential Community Volunteer Interviewers, and
- enlist businesses willing to be interviewed.

It is important to have a formal launch and announcement of the Program at a community event using a key champion, (eg, local mayor, government minister, respected community leader etc) who can endorse the objectives of the Program and commend its supporters. Use of appropriate media releases and appearances are vital (see resource document, "*Working With the Media*", Section 4:2).

## **6. Identification of, and contact with businesses to be visited**

At this stage, it is important that Project Coordinator, and Taskforce develop a list of businesses to be interviewed. The selection should be based on the community's economic development goals and objectives. While the type of businesses identified will vary from community to community, the following key factors should always be considered –

- sufficient numbers – the number of business operators to be interviewed should be large enough to ensure reliable results (30-180 businesses is the usual range);
- economic impact – it is important to select businesses that are contributing to the local economy, especially selling goods or services outside the community and thus bringing new income sources into the community, and
- important business sector(s) – it is important to focus on key business sectors within the community and/or sectors which offer greater potential for expansion (which could be retail, manufacturing, agricultural, home based, tourism etc).

Businesses are usually identified through business organisation membership lists, business directories, local government records, state or national trade or industry associations, telephone book advertising etc. Once businesses are identified, the Project Coordinator should make contact with businesses and ascertain their willingness to be involved, and identify the business owner/ manager who will be interviewed. Telephone confirmation should be followed up with a letter expressing appreciation for agreeing to participate and the names of the interview team who will make contact with them. In addition, a copy of the *Survey Questionnaire* should be included with the letter.

Other techniques that have been used to recruit businesses include:

- Mayor or President of Chamber of Commerce writing directly to every business about the Program;
- presentations to service and business groups and use of response form distributed and collected at the meeting;
- organisation of a Program launch event which seeks on the spot commitment to participate, and
- use of a telemarketing firm.

## **7. Recruitment and training of Community Volunteer Interviewers**

***'Every country is renewed out of the unknown ranks and not out of the ranks of those already famous and powerful and in control'***  
*(President Woodrow Wilson)*

The impact and success of the B.E.A.R. Program depends greatly on the ability of the Taskforce to recruit, train, recognise and support their Community Volunteer Interviewers.

The following aspects are worth noting regarding recruitment and training:

### **Volunteer requirements**

Community Volunteer Interviewers are required to commit to:

- a three hour training session which:
  - provides an indepth understanding of the B.E.A.R. Program;
  - outlines the roles of a Community Volunteer Interviewer; and
  - includes skill training in administering a structured interview (including role playing opportunities);
- participation with a team member in four to six interviews with local businesses (over a two to four week period); and

- a willingness to act in a professional manner as an ambassador for the B.E.A.R. Program, especially in regard to their communication style and observance of the strict confidentiality principle.

## Recruitment process

***'They're regarded as the most precious resource of an organisation, but finding the right volunteers, requires creativity and thinking outside the square'.  
(Jane Sandilands)***

From the earliest promotion of the B.E.A.R. Program, Taskforce members need to begin to identify and recruit possible Community Volunteer Interviewers. Such volunteers usually come from a variety of backgrounds including:

- taskforce members;
- service club personnel;
- active community members;
- Chamber of Commerce members;
- business operators;
- retirees;
- tertiary students and senior secondary students (especially business studies students); and
- development professionals.

Important sources to identify possible volunteer interviewers include:

- Taskforce members and volunteers personally approaching colleagues and friends;
- media exposure through a combination of stories, advertisements and talk back radio programs;
- addresses to service clubs and chambers of commerce;
- direct approach to secondary and tertiary institutions (especially Management and Business Schools);

- shoulder tapping of local development professionals and prominent 'community builders', and
- paid advertising.

***A recent survey showed that 82% of people volunteered because someone asked them!!***

A copy of a possible advertising leaflet targeting potential Community Volunteer Interviewers is included as a program tool (see Section 3, no 3).

An excellent resource worth consulting is the publication '*Count Me In! 501 Ideas on Recruiting Volunteers*' (2001) by Judy Esmond. This easy to read publication contains hundreds of practical ideas, tips and techniques regarding volunteer recruitment and development.

Judy Esmond, building on worldwide research, illustrates her hundreds of volunteer recruitment ideas through her '*Six R's of Recruiting*' framework, namely –

- **R**esearch the most effective recruitment strategies for your organisation.
- **R**eveal your recruitment message through great free publicity and powerful written material.
- **R**elate and develop networking opportunities that generate limitless volunteer referrals.
- **R**each out and discover new series of volunteers.
- **R**espond to world trends to access future volunteers ahead of the rest.
- **R**ecruit more volunteers in less time through target marketing.

## **Volunteer qualities**

The role of a volunteer interviewer is not for everyone. It is important that volunteers have:

- enthusiasm for the Program;
- reliability and commitment to Program responsibilities;
- commitment to local economic development;
- knowledge of their local community;
- good communication, listening and recording skills;
- an ability to respect and exercise confidentiality, and
- a willingness to work within the Project timeframe.

A screening process is important.

## Why People Volunteer

***'A recent Gallup Poll showed that the number one reason people currently do not volunteer for community services is that no one they know personally asked them to. So if you are out there taking positive steps to improve your community, ask a friend to help you'.***

(Reference Project America)

Statistics of volunteering have identified a number of incentives that influence people to volunteer –

- achievement;
- recognition and feedback;
- personal growth – discovering new capabilities;
- giving something back;
- bringing about social change – creating good in society;
- family ties; and
- friendship, support, bonding and a feeling of belonging.

***'The formula for successful volunteering that emerges from this study appears to go something like this – proud opportunities for personal achievement, allow volunteers to make new discoveries about themselves and others, and enable them to feel they are forming social bonds and strengthening their community. Mix with appropriate training, feedback and recognition and you have volunteers who feel energised by the assignment, see it as fun to do and complete it feeling better than when it started!***

(Volunteer Centre Ottawa – Carleton, 'Why People Volunteer')



## **Benefits to Volunteers**

Experience with the B.E.A.R. Program has shown that volunteers and their communities gain in many ways. The Program generally:

- is fun;
- builds networks and creates opportunities for people to meet and work with different people;
- provides learning experiences, especially in regard to the local community;
- achieves positive short and long term results;
- demonstrates a 'we care' attitude to a community's businesses;
- brings the community together, builds social capital; and
- is low risk if done correctly.

## **Community Volunteer Interviewer Handbook**

Accompanying this Facilitators Handbook is a Community Volunteer Handbook. Utilising the aforementioned, it is recommended B.E.A.R. projects reproduce their own local Handbook which will provide volunteers with -

- overview summary of the Program, process and structure;
- interviewer job description, and
- tips for interviewing.

## **Volunteer training**

Volunteer training needs to be mandatory. A three hour training session is recommended for prospective Community Volunteer Interviewers covering the following topics:

- the concept of community and economic development;
- B.E.A.R. Program overview – goals, objectives, structure, processes, responsibilities;
- Community Volunteer Interviewer job description;

- *Survey Questionnaire* – content and purpose of questions;
- setting up the interview;
- conducting the interview;
- principles of effective interviewing and recording;
- the confidentiality issue, and
- 'what to do if ...'?

It is recommended that the training session be repeated at two different times to ensure maximum attendance by all prospective volunteers. During the training sessions, each Community Volunteer Interviewer should receive a visitation kit containing:

- *Community Volunteer Interviewer Handbook*;
- an *Interview Assignment Sheet*, containing businesses names, contact person and contact numbers;
- copy of letter sent to participating businesses;
- copies of B.E.A.R. Program brochure/leaflet;
- copy of '*Common Questions and Answers about B.E.A.R. Program*';
- copy of Program Timeline;
- copies of the *Survey Questionnaire*; and
- copy of the *Community Volunteer Interviewer Confidentiality Agreement* (see Section 3, no 17).

The training session should ensure that all Community Volunteer Interviewers are familiar with all aspects of the Program and their responsibilities. At the end of the session, it is important that participants assess their decision to participate – and are given an opportunity to withdraw if concerned about their skills or time availability to handle the task.

## **Acknowledgment of Volunteer Contribution**

It is important that the Taskforce and Project Coordinator identify and act upon a range of opportunities to express appreciation for the contribution that volunteers make in this Program. (See Section 4 Appendix 5 – *43 Ways to Recognise Volunteers*)

***'there are two things people want more than sex and money ...  
recognition and praise'  
(Mary Kay Ash)***

## **Community Volunteer Interviewer Job Description**

An example of such a job description is attached as a Program Tool (Section 3, no 2).

Following the Volunteer training session, it is suggested that the Project Coordinator prepares and distributes a press release which emphasizes the level of community commitment and involvement, and highlights the Volunteer training session. Inclusion of a group photograph of the Community Volunteer Interviewers, together with their names is important.

### **B. VISITATION STAGE**

#### **1. Implementation of a systematic visitation of local businesses**

***'The power of communication begins with the art of listening,  
and community surveys are a great way to listen'  
(Unknown)***

As mentioned, Community Volunteer Interviewers work in pairs. As a team, they are responsible for:

- meeting together and deciding convenient and possible times to carry out interviews;
- making contact with those businesses allocated to visit by the Project Coordinator, and arranging an appropriate time

- and location to meet with the business' chief decision maker (owner and/or manager);
- carrying out the interview, during which they:
  - briefly outline the purpose, procedures and importance of the B.E.A.R. Program;
  - administer the *Survey Questionnaire* (while one team member records responses, the other systematically leads the interviewee through the survey questionnaire). Both interviewee and interviewers should have a copy of the survey questionnaire form.

The *Survey Questionnaire* is simply a tool to allow the business owner/manager to talk about their business experiences, needs, concerns, aspirations and ideas. It is important that Community Volunteer Interviewers record all relevant comments, and seek elaboration on interesting points/perspectives. Most of the interview time should be focussed on identifying and describing concerns, issues and suggestions for improvements to the business environment. It is important that *Survey Questionnaire* is structured in such a way to provide adequate space to enable concerns and issues of interviewees to be elaborated.

After the interview meeting, Community Volunteer Interviewers should :

- go over the survey immediately following the interview, and fill in any blanks with complete sentences, highlighting any key responses;
- fill in '*Follow up Suggestions and Red Flags*' sheet (see Program Tool, no 10);
- return the Survey and '*Follow up Suggestions and Red Flags*' sheet to the Project Coordinator as soon as possible;
- report any questions, concerns and comments regarding the interview process to the Project Coordinator, and
- maintain a Business Contact Record Sheet (see Program Tool, no 11).

Pairing Community Volunteer Interviewers is essential. It enables one member to ask the questions and keep the

interviewee on track, while the other person records the responses. The presence of two Community Volunteer Interviewers reinforces the fact that the community is committed to its local business community, and ensures that interviews are conducted in the most efficient and effective manner. If one Community Volunteer Interviewer can not make the interview at the last moment, the interview should be rescheduled.

The Project Coordinator should give adequate attention to the pairing of interviewers to ensure a personality mix. A mixture of backgrounds of the Volunteers in each team is also recommended, (eg, a public official and a private business representative, a business member and a student, male/female etc), as this reinforces the impression that the program is a community wide effort.

Approximately one and a half hours needs to be allocated for each interview. Interviews need to be undertaken during a defined two to four week period. Prior to each interview, it is important that each Community Volunteer Interviewer re-reads the Program Tool, No 5 '*Tips for Effective Interviewing*' which highlights key procedures and the code of ethics for the Program.

Finally, it is important that the Project Coordinator sends a 'thank you' letter (see example in Section 3, no 12) to each participating business, and outlines the future timetable and events to share and act upon information gleaned through the interviews.

A key role of the Project Coordinator in this stage is to monitor Community Volunteer Interviewer assignments and their progress. A *Master Coordination List* is a useful tool to facilitate this task (see Program Tool, no 6). It is important for the Project Coordinator to contact Community Volunteer Interviewers after their first interview to gauge their reaction and performance, and respond to any difficulties.

## **2. Immediate follow up regarding referrals and concerns**

The Project Coordinator and the Taskforce should review the completed *Survey Questionnaires* and the *'Follow Up Suggestions and Red Flag'* sheets for any special assistance that has been requested by individual businesses and instigate appropriate responses. This may involve:

- provision of information through the post;
- referral to an appropriate agency, eg, Business Enterprise Centre, TAFE, employment agency, local government council etc, requesting they follow up the request; and
- acting in an 'ombudsperson' role to investigate and help resolve a concern or complaint of local business.

Any early signs of business stress, eg, proposed relocation out of the community, closure, frustration with government agencies etc, need to be responded to quickly, if this is possible and appropriate.

It is important to ensure any action or referral does have the permission from the relevant business owner/manager.

## **C. ANALYSIS STAGE**

### **1. Analysis of survey results**

***'Plans are nothing, planning is everything'***  
*(Dwight D Eisenhower)*

Gathering of, and monitoring completed survey questionnaires is a key role of the Project Coordinator. Using the *Master Coordination List* (see Section 3, no 6), the Project Coordinator

should monitor the visitation stage, and pass completed *Survey Questionnaires* to the person responsible for entering data on computer.

A number of computer packages can be used for data entry and analysing and depicting results. The town of Benalla has recently undertaken the B.E.A.R. Program and have utilised and adapted an Access Microsoft package for tabulating results. The Rural Town of Benalla Economic Development Manager is willing to freely share this resource.

After data is entered, original Survey Questionnaires are maintained by the Project Coordinator, and preliminary results are presented to the Taskforce.

## **2. Identification of 'red flag' issues and opportunities**

***Red Flag Issues***  
***Urgent situations in a business that require immediate attention of the Task Team***

Both the Project Coordinator and the Taskforce need to review all the completed *Survey Questionnaires* and the computed results to identify key red flag issues, opportunities and common themes. *Red Flag issues* need responding to as soon as possible by the Taskforce. Identified opportunities and issues become the basis for formulation of proposed strategies and actions.

## **3. Review of other information relating to local business life issues**

The B.E.A.R. Program is just one tool for gathering information. In formulating action plans, it is important that Taskforce members utilise other information gathered from the business community within a recent time frame. Much of this will be available (eg, local and regional economic development studies,

industry sector studies, previous community surveys, corporate data from other communities, census information etc). During the planning stage above (see A3), the Taskforce may have instigated other surveys to compliment information to be derived from the B.E.A.R. exercise. The appendix section of this Handbook (Section 4) contains many examples, eg, Consumer Survey, the First Impressions Community Exchange, Residents Survey etc.

#### **4. Formulation of action plans to improve the community as a place to conduct business**

Usually with the assistance of a trained B.E.A.R. Facilitator, and/or a community economic and employment development specialist agency(ies), the Taskforce needs to formulate recommendations and action plans which incorporate a focus on both immediate short term responses and longer term strategies (two to five years).

Themes that should be addressed include:

- business grow strategies (eg, identification of local expansion barriers, improvements in business support services, skill training in subjects like marketing, merchandising, and staff motivation, business networking, coordination and organisation etc);
- new business opportunities (eg, plugging economic leakage, new business possibilities, business matchmaking, entrepreneurship development etc);
- labour market developments (eg, labour market projections and requirements, employee recruitment, workforce and human resource development, customer service, business-education partnerships etc);
- community infrastructure development issues (eg, telecommunications, transport, car parking, physical appearance, heritage preservation etc);
- economic development leadership, including identification, development, support, reward and renewal, both at individual and organisational levels;



- quality of life factors - issues, attitudes, actions and behaviours that help build a healthy effective community – foundation stones for creating an economically vibrant community, and
- resources – identification of financial and technical resources to support implementation of action plans.

Attached as an appendix is a Bank of I.D.E.A.S. Information Bulletin '*Examples of Economic Development in Action at the Local Level*', a useful resource in identifying the possible range of initiatives (see Section 4, no 7).

A strategic action plan does not need to be a lengthy publication. Often a brief document, utilising a user friendly layout style is valuable as a method to interest and excite the wider community. '*Formulating an Action Plan*' format is attached as a program tool which provides a possible format (see Section 3, no 13) Appendix 6 (section 4) also provides some resources to assist action planning.

Examples of the recommendations from the B.E.A.R. Visitation Program in the West Australian towns of Coorow and Carnarvon are in Section 4, no 10 (the first towns in Western Australia to undertake the B.E.A.R. Program). The website of the Queensland Department of Tourism, Regional Development and Industry ([www.dtrdi.qld.gov.au](http://www.dtrdi.qld.gov.au)) also provides summaries of B.E.A.R. projects from the towns of Malanda, Crows Nest and Innisfail.

## **D. COMMUNITY FEEDBACK AND ACTION STAGE**

### **1. Sharing of program results and outcomes**

It is vital that the survey questionnaire results, Taskforce recommendations and actions plans are communicated to the community. The following process steps are recommended:

- preparation and distribution of 'user friendly' reports (essential that each voluntary interviewer and participating business receive a copy);
- media releases on key points;
- participation in talkback radio programs;
- addresses to business and community meetings, eg, Council, Chamber of Commerce, service clubs, progress association etc;
- a major community meeting – an opportunity to both share outcomes, recommendations and action plans as well as seek community input and involvement in terms of future action. Such a meeting needs to be promoted to the whole community. In particular, all Community Volunteer Interviewers, participating businesses and economic/business groups and local councillors should be invited. To maximise the success of the meeting, note suggestions in program tool '*Conducting Effective Community Meetings*' (see Section 4, No 8).

## 2. Implementation of Action Strategies

***'I believe in action.  
In this world, it is not what you know that matters.  
Rather, it's what you do with what you know that counts.  
Information is valuable - action is invaluable'  
(James Belasco, Teaching the Elephant to Dance)***

The key outcome of this Program must be action; the implementation of action strategies based upon the issues, concerns and suggestions provided by the business community.

A major community meeting provides an opportunity to gain community endorsement for action (with possible modifications) as well as commitment from individuals/organisations to assume responsibility for implementation. Mobilisation of active support is vital. Designation of a timeline is also important. The community meeting is also an opportunity for revamping the leadership

team – Taskforce, and gaining commitment from its members for the implementation phase.

**'Sooner or later all the thinking and planning has to degenerate into work'**

*(Peter Drucker)*

### **3. Ongoing review of B.E.A.R. Program and action strategies**

***'A little known fact is that the Apollo Moon missions were on course less than 1% of the time. The mission was composed of almost constant mid course corrections. That's also true of most business and community situations'.***

*(James Belasco, Teaching the Elephant to Dance)*

Ongoing monitoring, review, evaluation and feedback is essential. As part of the action strategies, a set of performance indicators should be included – these provide a tool to evaluate and monitor the degree of success.

All participants in the Program should be contacted regarding their impressions - see Evaluation of B.E.A.R. Program (Section 3, no 14) for a useful evaluation tool to achieve this.

Finally, maintaining community interest and involvement is essential. *'Tips for Maintaining Community Interest and Involvement'* provides some valuable practical advice to ensure this happens (See Section 4, no 7).

Finally, international and Australian experience has regularly illustrated the importance of a set of success factors relating to the application of the B.E.A.R. Program, namely –

- local champion;
- community readiness;

- community commitment;
- adequate operational resources;
- sufficient enthusiastic volunteers;
- strong leadership team – Taskforce;
- energetic Project Coordinator;
- data analysis capability;
- commitment to all stages; and
- technical support.

***'Whatever you vividly imagine, ardently desire, sincerely believe and enthusiastically act upon, must inevitably come to pass'***  
*(Paul Meyer)*

### **Section 3 - PROGRAM TOOLS**

1. B.E.A.R. Program Checklist
2. A Job Description for Community Volunteer Interviewers
3. Advertising Leaflet for Potential Volunteers
4. Community Volunteer/Business Matching Form
5. Tips for Effective Interviewing
6. Master Coordination List
7. Letter to Participating Businesses
8. Business Information Cover Sheet
9. The Survey Questionnaire
10. Follow-up suggestions and Red Flags
11. Example of Business Contact Record Sheet
12. 'Thank you' Letter to Participating Businesses
13. Formulating an Action Plan
14. Evaluation Sheet
15. Examples of Possible Press Releases
16. Business Grow Information Kit – Some Guidelines
17. Confidentiality Statement

**Program tool no 1**

**B.E.A.R. Program Checklist**

<b>I Preparation for Program</b>	<b>Person(s) Responsible</b>	<b>Deadline</b>
Write a news release announcing the B.E.A.R. Program	_____	_____
Review the Survey Questionnaire and design special questions	_____	_____
Approach potential volunteers	_____	_____
Finalize the list of volunteers agreeing to participate	_____	_____
Develop the list of participating businesses	_____	_____
Create a master coordination list for visitation	_____	_____
Prepare a Business Grow Resource Kit	_____	_____
<b>II Training of Volunteer Interviewers</b>		
Insure volunteer's insurance	_____	_____
Schedule training sessions for volunteers and Taskforce members	_____	_____
Hold two alternative training sessions	_____	_____
Organise volunteer interviewers into teams of two	_____	_____
Assign 2 to 6 businesses to each interview team	_____	_____
Submit a news release describing the training program and upcoming interviews	_____	_____
<b>III Conducting Visits</b>		
Contact potential participating businesses describing the Program and requesting involvement	_____	_____
Send confirmation letter with a copy of survey to participating businesses	_____	_____
Make appointments for visits	_____	_____
Complete visits and interviews	_____	_____

	<b>Person(s) Responsible</b>	<b>Deadline</b>
Write letters of appreciation to local businesses	_____	_____
Prepare and distribute press release	_____	_____
<b>IV Developing Recommendations/Action Plan</b>		
Detach cover sheets organise data processing	_____	_____
Prepare summary report	_____	_____
Hold Taskforce meetings to review and discuss the identified business concerns	_____	_____
Identify immediate problems or red flags and implement follow-up	_____	_____
Develop action plans	_____	_____
Write a news release about business visits and key outcomes	_____	_____
Prepare recommendations and draft action plans	_____	_____
Develop an invitation list for the community meeting	_____	_____
Promote a community meeting	_____	_____
Submit a news release announcing the community Meeting	_____	_____
Organise a community meeting to present the survey results and draft recommendations and action plans	_____	_____
Develop a follow-up news release highlighting the results of the program and the community meeting	_____	_____
Prepare final recommendations and action plans	_____	_____

## **Program tool no 2**

### **A JOB DESCRIPTION FOR COMMUNITY VOLUNTEER INTERVIEWERS**

#### **Responsibilities**

1. Participate in a three hour training session to appreciate fully the philosophy and process of the B.E.A.R. Program.
2. Complete a Confidentiality Agreement regarding information gained through the Program.
3. As part of a two person visitation program, undertake four to six interviews with operators of local businesses, using the *Survey Questionnaire* of the Program. The objectives of these business interviews are:
  - to demonstrate a positive interest and attitude to the business community; and
  - to record individual business concerns, perceptions and ideas.

#### **Qualities required**

1. A genuine interest in the local community its future economic and employment opportunities.
2. Sufficient time and dedication to complete visits.
3. Adequate communication, listening and recording skills to undertake a structured interview and accurately report local business leaders' responses.
4. Ability to maintain the strictest level of confidentiality, ensuring no information shared during an interview should be disclosed to another party without permission.

#### **Time commitment**

All visitation teams should plan to attend one of two training meetings where goals, objectives and procedures will be explained and support material distributed. Each interview will require approximately one and a half hours. Community Volunteer Interviewers are expected to review



responses for clarity and legibility. They should identify responses that require immediate or special attention and add their recommendations for follow up.

## **Project Coordinator's Role**

The Project Coordinator is available to support the visitation process, and any concerns or requests of support by Community Volunteers Interviewers. He/She will provide necessary information and will receive completed surveys.

## **Benefits from Participation**

Participation has numerous benefits:

- opportunity to learn more about our local community and economy;
- opportunity to meet and work with new and different community members;
- a certificate acknowledging participation and contribution;
- knowledge that your involvement is helping to build a more vibrant and healthy community.
- 

In addition, all Community Volunteer Interviewers will be kept informed of the outcomes of the Project and invited to any community functions related to the promotion and implementation of the results of the project.

### Program tool no 3

## **EXAMPLES OF ADVERTISING LEAFLET FOR POTENTIAL VOLUNTEERS**

(Sponsoring Group letterhead)

### **Business Expansion and Retention (B.E.A.R.) Program EXCITING VOLUNTEER OPPORTUNITY**

**What will it do for me?** The Business Expansion and Retention (B.E.A.R.) Program provides a great volunteer opportunity for people wanting to help the positive development of their community. Involvement will also help participants wishing to develop their interview or surveying skills and their local networks. It will expose you to many small businesses in your local government area, leading to a good understanding of the nature of small business and the issues affecting their growth.

**Who is (Sponsoring Group)?** (Short description of sponsoring group)

#### **What is the Program?**

The B.E.A.R. Program will provide our community with information about what helps and hinders small business employment and growth. The Program will be conducted over a three month period during which time \_\_\_\_ (no) businesses will be interviewed. The interviews will be conducted in \_\_\_\_ and \_\_\_\_ (months). The results of the interviews will then be used to develop local and regional responses to assist the retention and expansion of small businesses within the community.

Voluntary Interviewers will be trained in survey techniques, and asked as a two person team to carry out four to six interviews. A local taskforce team has been established and will support their Volunteer Interviewer team. Once the interviews have been completed, the Taskforce will collate and interpret data.

#### **Reasons why you should consider being a Volunteer Interviewer:**

- opportunity to support positive community development
- training and practical experience in survey interview techniques
- exposure to an international program now operating internationally
- extending your networks
- understanding of the experiences of local small businesses

- opportunity to receive a Certificate acknowledging your input, skills and experience.

**What the commitment will involve:**

- attending a three hour training session in \_\_\_\_\_ (month)
- undertaking four to six interviews over a two to four week period

**What skills you will need:**

- good communication, listening and recording skills
- enthusiasm to participate in the Program
- the ability to remain impartial and retain confidentiality
- the capacity to commit the time to undertake the interviews

For more information ring: \_\_\_\_\_(Project Coordinator)

Business Retention Volunteer Interviewer

Expression of Interest

I am interested in finding out more about becoming a Community Volunteer Interviewer with the Business Expansion and Retention (B.E.A.R.) Program.

Fax to : (Project Coordinator)

Name:

Address:

Phone:..... (home) ..... (work)

Email: .....

Best time to contact by Phone:

Current work involvement:

Past and current community involvement:

**Thank you for your interest, we will be in touch soon**

Example of promotion by the Carnarvon B.E.A.R. Visitation  
Program Group

## CARNARVON NEEDS YOU

Volunteers for the Business Expansion and Retention Program  
are needed to fill the following positions:

### **Volunteer Interviewers Business Interviewees**

Why bother?

Because this incredible program is your chance to  
contribute to doing something about the economic  
development and growth of your town.

Interviews conducted by volunteers with business people lasting about an  
hour each will be conducted over a two week period in September, 1998.  
The interviews focus upon identifying the perceived impediments to  
conducting business within this community. They are a tool to work  
towards assisting businesses overcome these impediments.

Volunteer around 8 hours of your time and enjoy the rewards:

- Your contribution to a positive future
- A new leaning experience in the 'Interview Training Program' provided  
free
- Participation in a results driven project.

We are looking for people 17 years and over to participate in  
this exciting project. Please contact Gael Palmer, 9941 1803  
during business hours as soon as possible for more information.

***'Every country is renewed out of the unknown ranks and not out of the  
ranks of those already famous and powerful and in control'  
(President Woodrow Wilson)***

**Program tool no 4**

**COMMUNITY VOLUNTEER/BUSINESS MATCHING FORM**

One of the tasks of the Project Coordinator is to match interviewer pairs with businesses. In an effort to suit people's needs as much as possible, please fill out the following and fax or hand it in to: (Project Coordinator), Fax.....

**Interviewer:**

---

**Availability:**

(please circle your most likely availability)

Times

Morning

Afternoon

Evening

Days

Mon

Tue

Wed

Thur

Fri

Sat

Dates:

eg: 1-5 September

7-12 September

14-19 September

Any particular industry area(s) you would be interested in visiting.

---

## Program tool no 5

### **TIPS FOR EFFECTIVE INTERVIEWING**

Community Volunteer Interviewers should read this page before each interview.

1. Do not schedule interviews too closely. Allow enough time for travel, a tour of the business premises if offered, and an extensive discussion of business issues. Experience has shown that 1.5 hours is best allocated for an interview.
2. Review again the *Survey Questionnaire* before going into the interview.
3. Assess the mood of business operator / manager being interviewed and respond accordingly. If the timing has proved inconvenient, offer to re-schedule the interview.
4. Begin the interview by:
  - breaking the ice by introducing yourself and your partner;
  - briefly explaining the purposes of the B.E.A.R. Program and the purpose of the survey;
  - mention '*Skip It Rule*' – if the business operator/manager does not wish to respond to a question, that is fine and the interview will just move to the next question without question;
  - reminding the interviewee that all information will be treated in the strictest confidence, and that Interviewers have signed a confidentiality agreement; and
  - check details with interviewee re the cover sheet information for accuracy.
5. Check that business owner / manager has a copy of the survey questionnaire that was forwarded in the mail. If not, provide another copy.
6. Please write neatly!
7. Avoid arguing or debating. Do not try to answer a question for the business or lead them in any way.
8. Do not promise specific assistance or recommend any solutions to problems raised. The purpose of the interview is to gather information, not to give advice. Indicate concerns will be related to the Project Coordinator and the Taskforce.

9. Remember to clarify any answer before proceeding to next question.
10. Do probe for more when interviewee gives an interesting and / or strong response to an open ended question e.g. '*Could you tell us more about that?*'
11. Keep in mind that the business owner / manager has the right to skip any question they feel uncomfortable with. Just write the word '*skipped*' across the questions on the survey. If they just want to talk, then ask about their concerns and ideas.
12. Do not be limited by answer space under a question. Write as much as possible about any interesting issues, perceptions and / or ideas.
13. If there is not enough time to finish the *Survey Questionnaire*, make a follow up appointment before leaving.
14. If environment is too noisy, suggest locating to a quieter environment.
15. At the end of the interview, thank the business owner/manager. Explain that the overall results of the surveys will be published in the media, shared at business and community meetings, and will provide the basis for a community economic strategy. Mention that a copy of the results will be posted to the business. Remind the interviewee that all information will be treated in the strictest confidence, and all published reports will print general findings, and avoid all individual references.
16. Be sure to contact the Project Coordinator if:
  - a. you cannot complete the survey;
  - b. there is an immediate 'red flag' issue(s); and/or
  - c. you have any questions or experience any difficulty.

**Program tool no 6**

**MASTER COORDINATION LIST**

	1.	2.	3.
Business Name			
Contact Person			
Contact details Location			
Postal address			
Phone			
Fax			
Email:			
Volunteer Interviewers			
Interview date			
Date letter/ survey mailed			
Date Survey received in office			
Red Flag Issues			



**Program tool no 7**

**LETTER TO PARTICIPATING BUSINESSES**

**Sponsoring organisation letterhead**

**BUSINESS EXPANSION AND RETENTION (B.E.A.R.) PROGRAM**

Dear \_\_\_\_\_,

Thank you for your willingness to participate in our B.E.A.R. Program. As agreed, \_\_\_\_\_ and \_\_\_\_\_, Community Volunteer Interviewers with our program, will meet with you at \_\_\_\_\_ on \_\_\_\_\_ at the following location \_\_\_\_\_

Attached is the interview *Survey Questionnaire* that our Volunteer Interviewers will go through with you. We consider it the most important survey undertaken in our community this year.

The interview is the key element of our Business Expansion and Retention (B.E.A.R.) Program, a community initiative that seeks to help our local businesses do better by listening to their issues and needs, and responding to their concerns. Your answers will help identify issues and suggestions that must be addressed to improve business prosperity in our community.

Please note that all information will be kept strictly confidential. All data processing will be carried out according to strict procedures and no individual details will be disclosed to third parties without your prior permission being given. Whilst responses will be used to build a general business profile of the community, no individual business information will be released.

A brochure is attached which outlines the B.E.A.R. Program. If you have any questions do not hesitate to contact me on \_\_\_\_\_

Thanking you again for your participation,

Yours,  
(Project Coordinator)

**Program tool no 8**

**BUSINESS INFORMATION COVER SHEET**

**BUSINESS EXPANSION AND RETENTION PROGRAM**

Business name:

Reference No:

Postal Address:

Post code:

Location address:

Telephone number:

Fax number:

E-mail address:

Person interviewed:

Position:

Volunteer visitors:

**Program tool no 9**

**SAMPLE SURVEY QUESTIONNAIRE**

BUSINESS EXPANSION AND RETENTION (B.E.A.R.) PROGRAM

COMMUNITY:

BUSINESS REFERENCE NO:

SURVEY DATE:

INPUT DATE:

1. Is all information on the cover sheet complete and correct?  
Yes  No  (if no, make the necessary corrections)

2. Describe the main activities of your business?

3. Which of the following categories best describes your business activities (please tick appropriate boxes)?

- |  |                          |                       |                          |
|--|--------------------------|-----------------------|--------------------------|
| agriculture, forestry, fishing, hunting                          | <input type="checkbox"/> | communications        | <input type="checkbox"/> |
| manufacturing  | <input type="checkbox"/> | community service     | <input type="checkbox"/> |
| finance, property, business services                             | <input type="checkbox"/> | wholesale and retail  | <input type="checkbox"/> |
| building and construction  | <input type="checkbox"/> | transport and storage | <input type="checkbox"/> |
| recreation, hospitality, tourism,<br>personal and other services | <input type="checkbox"/> |                       |                          |

4. Is your business locally owned?

Yes

No

If not locally owned is your business?

State company branch

National company branch

International company branch

Other (please explain) .....

5. Which of the following categories applies to your business?

Sole trader

Partnership

Company

Cooperative

6. How long has your business been operating in this community:

Less than 1 year

2 to 5 years

6 to 10 years

Longer than 10 years

7. What are the major products or services offered by your business and what percentage of your sales comes from each area? (just a guesstimate)

	Major Product or service	Percentage sales	Current market (local,regional,state etc)
a.	_____	_____	_____
b.	_____	_____	_____
c.	_____	_____	_____
d.	_____	_____	_____
e.	_____	_____	_____

8. What is special or unique about your products or services (B.E.A.R. Visitor, please take detailed notes here)

9. How many people do you employ (including Directors and Partners)?

	Total	Male	Female
Number full time	_____	_____	_____
Number part time	_____	_____	_____
Number casual/contractor	_____	_____	_____
TOTAL	_____	_____	_____

10. Over the next two years, do you expect any change in the number of people you employ?

Increase employees

Decrease employees  (tick one box)

No change

Could you explain your choice:

11. What do you perceive as being the main advantages of running a business in our community? (Please tick up to five (5) advantages)

- |  |                          |   |                          |
|--|--------------------------|---|--------------------------|
| local customer loyalty                               | <input type="checkbox"/> | proximity to key industries             | <input type="checkbox"/> |
| quality & supply of local labour                     | <input type="checkbox"/> | reliable transport and freight services | <input type="checkbox"/> |
| housing available for employees                      | <input type="checkbox"/> | proximity to markets                    | <input type="checkbox"/> |
| positive image of the community                      | <input type="checkbox"/> | quality of life the area has to offer   | <input type="checkbox"/> |
| reliable support businesses and other local services | <input type="checkbox"/> | good car parking                        | <input type="checkbox"/> |
| communication networks                               | <input type="checkbox"/> | crime rates                             | <input type="checkbox"/> |
| other advantages please specify                      |                          |   |                          |
- .....

12. What do you perceive as the main disadvantages of operating a business in our community (Please tick up to five (5) disadvantages)

- |   |                          |                                   |                          |
|---|--------------------------|-----------------------------------|--------------------------|
| time/distance from other markets        | <input type="checkbox"/> | lack of local support and loyalty | <input type="checkbox"/> |
| time/distance from suppliers            | <input type="checkbox"/> | poor service of local businesses  | <input type="checkbox"/> |
| transport costs                         | <input type="checkbox"/> | slow growth of local market       | <input type="checkbox"/> |
| negative image of the community         | <input type="checkbox"/> | small size of local market        | <input type="checkbox"/> |
| quality of infrastructure               | <input type="checkbox"/> | lack of employee housing          | <input type="checkbox"/> |
| crime rate                              | <input type="checkbox"/> | lack of support by Council        | <input type="checkbox"/> |
| shortage of skilled labour              | <input type="checkbox"/> | planning restrictions             | <input type="checkbox"/> |
| road networks                           | <input type="checkbox"/> | poor car parking                  | <input type="checkbox"/> |
| communication costs                     | <input type="checkbox"/> |                                   |                          |
| other disadvantages please specify..... |                          |                                   |                          |

13. How would you rate the outlook for your business over the next 12 months?

- |           |                          |            |                          |
|-----------|--------------------------|------------|--------------------------|
| very good | <input type="checkbox"/> | poor       | <input type="checkbox"/> |
| good      | <input type="checkbox"/> | very poor  | <input type="checkbox"/> |
| fair      | <input type="checkbox"/> | don't know | <input type="checkbox"/> |

Please explain your choice:

14. What are the major constraints to expanding your business?  
(Please tick up to four (4) reasons)

- |  |                          |  |                          |
|--|--------------------------|--|--------------------------|
| availability of finance                | <input type="checkbox"/> | small size of local market                 | <input type="checkbox"/> |
| limited product range                  | <input type="checkbox"/> | lack of space                              | <input type="checkbox"/> |
| market share is too small              | <input type="checkbox"/> | too much competition                       | <input type="checkbox"/> |
| franchise restrictions                 | <input type="checkbox"/> | not enough customers                       | <input type="checkbox"/> |
| lack of skilled employees              | <input type="checkbox"/> | federal government attitudes and practices | <input type="checkbox"/> |
| achieving recognised quality standards | <input type="checkbox"/> | state government attitudes and practices   | <input type="checkbox"/> |
| uncertainty of customer loyalty        | <input type="checkbox"/> | local government attitudes and practices   | <input type="checkbox"/> |
| commodity prices                       | <input type="checkbox"/> | small catchment area                       | <input type="checkbox"/> |

other constraints – please specify

.....

15. Do you expect the sales for your products/services to increase, stay the same or decrease over the next 3 years?

Increase  Stay the same

Decrease  (tick one box)

Please explain your choice:

16. Who are your main competitors?

17. Would you say that your competitors are:

Losing ground to you

Making significant inroads on your market share

No impact either way

A future threat

Can you explain your choice more fully?

18. What do you consider to be useful in helping your business improve its performance over the next 12 months? (tick whichever apply)

improved management skills

improved labour relations

improved staff skills

better industry information

more staff

new products

better access to information on incentive schemes for staff

greater community support

new machinery/equipment

reduced staff

other factors (please specify) \_\_\_\_\_



19. Please list the main products or services **your business purchases** from outside the local community and indicate why by placing a tick in the appropriate column(s).

Tick which column is appropriate								
Service or product	Buying policy	Price	Quality	Avail-ability	Delivery time	After care service	Unaware of local provider	Other (please specify)

20. Are there any services or products which you have considered providing or manufacturing locally, but did not proceed with the idea?

Yes  No

If yes, what services or products and what were your reasons for not proceeding?

21. Are there any products or services which you find difficult to obtain locally?

Yes  No

If yes, please specify.

22. Are there any industries/businesses/services which you think could be successfully located in this area?

23. If you were to take on any new staff in the future, what skills would you be looking for? (tick which ever apply)

- |                                   |                          |                            |                          |
|-----------------------------------|--------------------------|----------------------------|--------------------------|
| Research skills                   | <input type="checkbox"/> | Data entry skills          | <input type="checkbox"/> |
| Word processing skills            | <input type="checkbox"/> | Spreadsheet skills         | <input type="checkbox"/> |
| Typing/clerical skills            | <input type="checkbox"/> | Engineering skills         | <input type="checkbox"/> |
| Strategic skills                  | <input type="checkbox"/> | Business management skills | <input type="checkbox"/> |
| Finance management skills         | <input type="checkbox"/> | Design/graphic skills      | <input type="checkbox"/> |
| Interpersonal skills              | <input type="checkbox"/> | Marketing skills           | <input type="checkbox"/> |
| Negotiation skills                | <input type="checkbox"/> | Customer service skills    | <input type="checkbox"/> |
| Public relations skills           | <input type="checkbox"/> |                            |                          |
| Technical skills (describe) ..... |                          |                            |                          |
| Trade skills (describe) .....     |                          |                            |                          |
| Others (describe) .....           |                          |                            |                          |

24. If you were to take on new staff in the future, what occupations would you be looking for? (tick which ever apply)

- |                       |                          |                                  |                          |
|-----------------------|--------------------------|----------------------------------|--------------------------|
| Manager/administrator | <input type="checkbox"/> | plant/machine operator or driver | <input type="checkbox"/> |
| professional          | <input type="checkbox"/> | labourer/farm hand               | <input type="checkbox"/> |
|                       |                          | waiter/waitress                  | <input type="checkbox"/> |
| technicians           | <input type="checkbox"/> | apprentice/trainee               | <input type="checkbox"/> |
| trades person         | <input type="checkbox"/> | sales person                     | <input type="checkbox"/> |
| clerical              | <input type="checkbox"/> | other (specify) .....            |                          |

25. How did you recruit your last staff member? (tick which ever apply)

word of mouth  local advertisement

advertisement in state newspaper  employment agency

other (please specify) .....

26. Are there any occupational skills you find difficult to find in the community when looking for staff? (tick one box only)

Yes  No

If yes, please indicate which:

27. Have you considered: (tick any appropriate box)

moving your business out of the community

selling your business

closing your business

If yes to any of the above, are you willing to share reasons?

28. Do you have plans to change, modernise or expand your operation?

- |                              |                          |                                  |                          |
|------------------------------|--------------------------|----------------------------------|--------------------------|
| expand                       | <input type="checkbox"/> | no change                        | <input type="checkbox"/> |
| modernise facilities         | <input type="checkbox"/> | change mix of goods/<br>services | <input type="checkbox"/> |
| add product line             | <input type="checkbox"/> |                                  |                          |
| change production technology | <input type="checkbox"/> | add services                     | <input type="checkbox"/> |

29. If changes are planned, are you willing to describe what is planned, and when work will begin?

30. Would you like additional information concerning the following subjects, (tick whichever apply).

- |                   |                          |                           |                          |
|-------------------|--------------------------|---------------------------|--------------------------|
| business planning | <input type="checkbox"/> | business management       | <input type="checkbox"/> |
| taxation          | <input type="checkbox"/> | marketing strategies      | <input type="checkbox"/> |
| council by laws   | <input type="checkbox"/> | R+D grants                | <input type="checkbox"/> |
| merchandising     | <input type="checkbox"/> | business funding programs | <input type="checkbox"/> |
| exporting         | <input type="checkbox"/> | e-commerce                | <input type="checkbox"/> |
| other             | .....                    |                           |                          |

31. With your permission can we share your firm's name with the local, state or federal agencies that provide this information?

- Yes  No

32. What avenue is most helpful to receive this information? (tick all appropriate boxes)

information by post  workshops

by email  individual consultation

33. Is your business experiencing any problems with any section or department of local, state or commonwealth government?

Yes  No

If yes, what problems:

34. While the B.E.A.R. Taskforce cannot promise to solve any issues, they are willing to look in to it. Would you like our Task Force to assist you with any particular problems/issues?

Yes  No

If yes, what do you suggest?

35. Does your business have access to -

Internet access and email

website

domain name

online shopping facilities

If you have a website, what percentage of sales comes through it?  
\_\_\_\_\_%

36. Our local Business Association, - do you feel your business receives any direct or indirect benefit from the existence of it?

Yes  No

Please explain your answer more fully:

37. Would your business be interested in being involved in a "support local" marketing campaign?

Yes  No

If yes, what suggestions do you have?

38. What do you believe is the single most important factor in ensuring a viable future for businesses in our community?

39. Do you have any other ideas or suggestions about making our community a better place to operate a business?

40 Finally, have you found this questionnaire and the B.E.A.R. Program helpful in expressing your views about operating a business in our community?

Yes  No  Not sure

**Thank you for your time**

**Program tool no 10**

**FOLLOW UP SUGGESTIONS AND RED FLAGS**

(Completed by Community Volunteer Interviewers immediately following interview)

Reference No: .....

1. Comment on how well you felt the interview went.
  
2. Comment on the level of interest shown by the interviewee in the B.E.A.R. Program. Are they likely to be interested in future business development initiatives?
  
3. What concerns or suggestions appeared to be most important to this business owner/ manager?
  
4. Identify and briefly describe requests for a follow up visit, or responses that point to the relocation, closure or expansion of this business.
  
5. Rank the urgency of a follow up visit from one to five with five being the most urgent (circle your response)

Not Urgent Very Urgent

Need for follow up 1 2 3 4 5

Attach this form to the completed survey and return it to the Project Coordinator

**Program tool no 11**

**EXAMPLE BUSINESS CONTACT RECORD**

**BUSINESS CONTACT RECORD FOR** \_\_\_\_\_

**Names of Volunteers:** \_\_\_\_\_

<b>Business Name</b>	<b>Contact Person</b>	<b>Address</b>	<b>Tel</b>	<b>Interview Date</b>	<b>Interview Time</b>	<b>Red flag Issues (Yes/No)</b>
1.						
2.						
3.						
4.						
5.						
6.						
7.						
8.						
9.						
10.						

Return this form with completed surveys to \_\_\_\_\_  
at the end of each week in the envelopes provided.



**Program tool no 12**

**THANK YOU LETTER TO PARTICIPATING BUSINESSES**

Sponsoring organisation letterhead

**Business Retention & Expansion (B.E.A.R.) Program**

Business address

Dear \_\_\_\_\_,

On behalf of the ..... B.E.A.R. Program, can I express our appreciation for your willingness to participate in the recent business visitation program. Your issues, concerns and suggestions were invaluable in terms of gaining a better insight into the needs, perceptions and opportunities of local businesses, and will be incorporated into economic development plans for our community.

Over the coming weeks, key findings and recommendations from the visitation program will be communicated through the local media. On ....., a community meeting is being convened to share outcomes and possible future actions.

If you are able to attend, you would be most welcome. The venue for this occasion is .....

Once again, many thanks for your cooperation with this important community project.

Yours,

(Project Coordinator)  
Name

## Program tool no 13

### **FORMULATING AN ACTION PLAN**

*I keep six honest serving men, they taught me all I know. Their names are  
What and Why and When and How and Where and Who'  
(Rudyard Kipling)*

An Action Plan should provide a practical statement on the implementation of recommendations and action strategies developed by the Taskforce. This Plan should clearly define priorities, specific actions, when they will be undertaken and by whom. It should also state expected outcomes, performance indicators against which success will be judged and what resources will be required.

The following is a possible structure and format which can be followed:

- Program objective – objectives should clearly identify what will be achieved, how it will be done and when it will be accomplished. Each objective should be clearly identified with a specific set of actions (i.e., programs, projects or strategies) attached to it. Objectives provide a rationale for each action.
- Programs, projects and strategies – initiatives may take the form of formal programs, individual projects or specific strategies. They represent a set of actions which, when implemented, will help achieve program objectives. These should be described in detail to demonstrate how they will work to address objectives.
- Action steps – this involves a detailed description of the actual activities and tasks that will be undertaken to implement the program, project or strategies. Action steps represent the 'to do' list regarding successful implementation of the strategy.
- Target group(s)- each action will be directed at a specific group. These groups need to be clearly identified.
- Expected outcomes – it will be necessary to describe the outcomes that will be anticipated from these actions. That is, what will the action achieve.
- Responsible person/agency – the person/group responsible for the overall implementation and coordination of the action should be identified.
- Support persons/agency – whilst one person or group may hold responsibility for the coordination and implementation of the action plan, there may be a number of other people/groups involved. These should be identified.
- Time frame – it is necessary to indicate when the action will occur and over what period of time.
- Resource implications – each action should have a set of performance indicators that can be used to evaluate and monitor the degree of success. These indicators need to be measurable within the time period of the action.

**Program tool no 14**

**EVALUATION OF B.E.A.R. PROGRAM**

1. What was your role in the local B.E.A.R. Program (circle all that apply)

- a. Project Coordinator
- b. Taskforce member
- c. Community Volunteer Interviewer
- d. Individual interviewed during firm visit
- e. Facilitator(s) \_\_\_\_\_  
agency/institution

2. What is your employment affiliation? (circle all that apply)

- a. Local council councillor
- b. Local government officer
- c. Economic development professional
- d. Business person
- e. Community worker
- f. Retired
- g. Student
- h. Other (please specify) \_\_\_\_\_

3. How successful do you think this Program was in demonstrating a pro-business attitude? (Circle one)

Not very successful Very successful

1                      2                      3                      4                      5

4. How successful do you consider this Program was in helping businesses learn about support services and programs? (Circle one)

Not very successful Very successful

1                      2                      3                      4                      5

5. How successful do you think this Program was in helping local leaders understand the strengths and weaknesses of the community from the perspective of local business? (circle one)

Not very successful Very successful

1                      2                      3                      4                      5

6. Overall, in your judgement, how effective do you think the recommendations and the action plans will be for improving the local business economy.

- a. Very effective
- b. Effective
- c. Uncertain
- d. Not effective
- e. Harmful

7. What do you think has been the most important outcome of this Program?

.....

.....

8. What do you think is the most important recommendation that needs to be accomplished?

.....

.....

9. Please rate the following factors of the B.E.A.R. Program

	Excellent	Good	Fair	Poor	Don't know/ not applicable
1. Content of questionnaire	a	b	c	d	e
2. Length of the questionnaire	a	b	c	d	e
3. Maintenance of confidentiality	a	b	c	d	e
4. Resolution of local problems	a	b	c	d	e
5. Development of plans	a	b	c	d	e
6. Implementation of strategic plan	a	b	c	d	e

10. If you were asked by another community whether or not that community should establish a B.E.A.R. Program, would you recommend it?
- a. Yes, definitely
  - b. Yes
  - c. Uncertain
  - d. No
  - e. Definitely not

## Program tool no 15A

### EXAMPLES OF POSSIBLE MEDIA RELEASES

[Sponsoring Group letterhead]

Release #1

For immediate release  
[date]

For more information  
[Project Coordinator's name]

#### Community Economic Development Program formed

[Community Name] will implement a Business Expansion and Retention (B.E.A.R.) Program [date], according to [project coordinator's name], Project Coordinator for the Program.

The B.E.A.R. Program will provide local businesses within [community name] with an opportunity to share their thoughts on what helps and hinders operating within the [community name], and share ideas for building a better local business environment. [Project coordinator's last name] said, existing businesses account for up to 60 to 80% of all new jobs. Helping established businesses increase their competitiveness helps ensure that those firms will stay and expand in the community, thus providing more opportunities to [community name].

[Sponsor groups name] is sponsoring the B.E.A.R. Program in [community name]. In addition to the support of [name of sponsoring group], [number] recruited Community Volunteer Interviewers will help carry out the program. The Community Volunteer Interviewers will visit about [number] local businesses to gather information.

[Project coordinator's last name] emphasised the confidentiality of the information gained from these visits. The results will be reviewed to find solutions to the issues raised and develop new initiatives. Their findings will be presented at a variety of business and community meetings. Assisting [project coordinator's last name] with the analysis of these problems is [outside Facilitator's name, if applicable], who will act as the Facilitator and [number] Taskforce members. These members, comprised of civic, business and community leaders, will work in partnership with the Project Coordinator and Facilitator. They include [list the Taskforce members].

"[quote from project coordinator describing the cooperative nature of the program or his expectations,]" said [Project Coordinator's last name].

## Program tool no 15B

For immediate release  
[date]

[Sponsoring Group letterhead]

Release #2  
For more information  
[Project Coordinator's name]

### **Community Volunteer Interviewers Complete Community Economic Development Program Training**

Two training sessions for participants in an economic development program that begins this week were held [date] at the [place], according to [project coordinator's name], Project Coordinator for the Program.

[Project coordinator's name] said, 'Community Volunteer Interviewers attended one of the two, 3 hour training sessions to become familiar with the [community name] Business expansion and retention (B.E.A.R.) Program.

The B.E.A.R. Program will help existing businesses within [community name] become more competitive and will identify any impediments that discourage local expansion, according to [Project Coordinator's last name].

"[Quote from the project coordinator emphasizing the importance of local Community Volunteer Interviewers to the program,]" said [Project Coordinator's last name].

The Program is designed to stimulate local economic and business development by helping existing industry, according to [project coordinator's last name]. [Project Coordinator's last name] pointed out that to help industry, a community must first identify industry's needs and problems and then address those concerns to improve the local business climate.

The two-member volunteer teams will visit [number] local firms between now and [date]. During each visit, the Volunteers will use a questionnaire to gather information about each business. The two training sessions last night were held to help prepare the volunteers for their interviews.

`[quote from a Community Volunteer Interviewer about a what he/she learned from the training sessions and his/her opinion of the program after the training or about his/her participation in the project], said [name], a Volunteer Interviewer.

[Project Coordinator's last name] emphasized that the information gathered through the surveys will be strictly confidential. The information will be reviewed by the Project Coordinator, Facilitator, and Taskforce members. They will address the problems, concerns, and needs mentioned by the businesses, with the intention of improving the local business environment.

"[quote from Project Coordinator about his/her expectations of the program or the results and recommendations at the end]," [Project Coordinator's last name] said.

### **Program tool no 15C**

For immediate release  
[date]

[Sponsoring Group letterhead]

Release #3  
For more information  
[Project Coordinator's name]

### **Community Economic Development Survey Completed**

The [community] Business Expansion and Retention (B.E.A.R.) Program completed a survey of [number] local businesses. The Program's Taskforce will present its findings and offer its recommendations for economic development at [time], [date] in the [name or the room] of the [place]. All those interested are encouraged to attend.

The survey, sponsored by the [sponsoring group], is the basis of a comprehensive profile on the [local community] business community. The participants represent over [number] percent of local businesses.

Looking at the progress of the program, which began last [month], Project Coordinator [name] expressed [his or her] strong satisfaction with the results. Said [Project Coordinator's last name] "[quote about the cooperation received from the business community]".

People interested in attending the results' presentation could contact [Project Coordinator's last name] at [phone number and/or address] for more details.



## **Program tool no 16**

### **BUSINESS GROW INFORMATION KIT – SOME GUIDELINES**

A recommended action, either during the business visitation process or as a follow up action is to present each business with a *Business Grow Information Kit*. This strongly supports the focus of the visit, namely local support for its business community.

The compilation of the *Business Grow Information Kit* is a function of the local Taskforce. Its content can be identified through the conduct of a workshop on the topic. The exercise has the added advantage of helping the Taskforce appreciate the range of assistance available. It is important that the *Kit* contains information described in a user friendly style about local contacts, services and programs that could enhance business capacity and performance. A comprehensive kit will include information on:

- employment services and assistance;
- business planning support;
- financial advisory services;
- training/skills development opportunities;
- local networking and support groups including key shire contact people, and
- relevant (simple) regional and industry data.

A summarised "fact sheet" or booklet on all relevant government programs will be of greater assistance than separate information items. The summary sheet should include local contact names and numbers wherever possible.

Sources of such information include the local Business Enterprise Centre, Area Consultative Committee, government economic and employment development departments, industry training network, industry development organisations, chambers of commerce etc.

**Program tool no 17**

**CONFIDENTIALITY STATEMENT**

I, .....[name], understand the significance of confidentiality concerning the Business Expansion and Retention (B.E.A.R.) Program in the community of .....

I promise to keep any information received in the course of my duties with this project confidential.

I understand that the information collected from the businesses is to be treated as confidential and is not to be disclosed to others except in the context of the purpose for which it was collected.

.....  
Signature

.....  
Print name

.....  
Witness

.....  
Date

## **Section 4 - Appendices**

1. Community Economic Development – Possible Action strategies
2. Working with the Media
3. Code of Practice for Volunteer Agencies
4. Code of Practice for Volunteers
5. 43 Ways to Recognise Volunteers
6. Action Planning Resources
7. Examples of Economic Development in Action at the Local Level
8. Conducting Effective Community Meetings
9. Tips for Maintaining Community Interest and Involvement
10. Summary of Recommendations from B.E.A.R. Programs
11. Relevant B.E.A.R References and Websites
12. Notes on the First Impressions Community Exchange
13. Sample of a Consumer Survey
14. Sample of a Community Assessment Survey
15. Sample of a Resident Survey
16. Sample of a Visitor Survey

## **Appendix no 1**

### **COMMUNITY ECONOMIC DEVELOPMENT POSSIBLE ACTION STRATEGIES**

Sustainable community economic and employment development does not result from any "quick fix" measures. It involves developing a mix of initiatives related to the community's competitive advantages. Both international and Australian experience of community economic development strategies illustrate that there are at least six broad and interrelated approaches that may be of value to a community. These are:

- **Retaining and Expanding Local Businesses**  
Actions which assist local businesses improve their productivity and market share;
- **Fostering New Businesses**  
Actions that encourage and support the creation of new businesses to add value to existing products, to meet changing consumer demands, or to capture sales which might otherwise go to other communities, regions or countries;
- **Attracting Outside Businesses and Resources**  
Actions that bring new investment, employers, investment and funding to the community;
- **Plugging the Leaks in the Local Economy**  
Actions that encourage greater loyalty in terms of purchasing by local residents and businesses;
- **Enhancing the Job Linking Capacity of the Community**  
Actions that utilise community development processes and social networks to support the job search activities of unemployed people, to help fill job vacancies more quickly, to discover hidden job opportunities, to improve information flows regarding job creation assistance and to help counter attitudinal reasons why some employers may not be increasing their workforce; and
- **Marketing the Community**  
Actions that enhance the appeal and image of the community to potential visitors and new settlers.

## **Appendix no 2**

### **WORKING WITH THE MEDIA**

The media (newspapers, TV, radio) is a very important means of informing the community about the B.E.A.R. Program and its outcomes. Media coverage is a vital information, marketing and promotional opportunity which no community can afford to ignore. However, effective use of the media is a skill which needs to be developed.

#### **General Principles**

- Decide within the sponsor organisation who will deal with the media. Whether you use one person eg, Project Coordinator) or a group to deal with publicity, it is essential that reporters know who to contact for a clear, mandated comment or statement. Channel all communications with the media through one spokesperson and ensure all your members know who this is.
- Be careful not to raise local expectations beyond what you can deliver. This will quickly lose your credibility with the community and it will take a long time to get it back.
- Be proactive - seek the media out. Do not wait for the media to chase you. Make a list of local newspapers, radio and TV contacts, including local newsletters.
- Establish relationships. Get to know local reporters, correspondents and editors. Find out about their deadlines and the issues they are interested in. Be mindful of constraints on their time.
- Playing favourites with the local media is not smart practice. Alternate the times you give out stories and press releases so you do not favour one paper or radio station.
- Be open and reliable - give accurate information. Stick to the facts. If you are giving an opinion make sure you state it is your opinion. Provide honest answers to questions and do not be afraid to say that you do not know something. If you are phoned by a reporter to comment on something, feel free to ask for 10 minutes to collect your thoughts, but make sure you phone back.
- Invite media representatives to your meetings. Send them minutes (always with a prepared media statement summarising the key points

you wish to convey), give them early notice of important events. Always provide an after hours phone number at the end of any press statement or after an interview and return calls promptly. Go out of your way to report progress.

- Be helpful - most media organisations are short of time and resources. Put particular effort into writing media press releases (see below). Journalists are usually too busy to spend a lot of time rewriting press statements. Attach photos.

### **Make sure it's news**

The media look for news that is new, unusual and which in their opinion will interest their readers, listeners or viewers. Do not bombard them with endless press releases, you will soon develop a bad reputation.

As a general rule, the more local the media outlet (local newspapers, community radio) the greater their feeling of obligation and willingness to report events and issues of interest or benefit to the local community.

Make sure your news is fresh and allow time for reporters to meet their deadlines.

Arrange photographic or video opportunities or provide good quality photographs (most media prefer to take their own).

### **Ways of conveying news to the media**

- Media press releases
- Phone calls/alerts
- Invitations
- Media conferences
- Radio phone-in shows
- Circulation of documents
- Letters to the Editor

### **Press Releases**

A press release (media release or press statement) is one of the most efficient ways of informing the media or making an announcement. It saves your group and media outlets time, helps get the facts correct and enables your group to inform a range of media outlets at the same time. It is simply a statement that tells "the WHAT, WHEN, WHERE, HOW, and WHY" concisely.

A press release must create a positive image in the critical eyes of the media. Poorly drafted press releases usually end up in the rubbish bin and reduce the credibility of your group.

To enhance the effectiveness of your press releases, note the following:

- Use a media release letterhead which reflects your sponsor's identity - keep the design uncluttered and avoid using small typeface.
- Make sure you grab the reader's attention in the headline and the first sentence.
- Place the most important facts at the top and then arrange your material in descending order of importance. Do not attempt to get everything into the first (lead) paragraph, which should consist of no more than 30 words.
- Ensure material is accurate. Check all facts especially spelling of people's names and titles.
- Keep it short, preferably a single page, two pages at the most. (Keep to 400 words or fewer).
- Ensure it is dated and contains a contact name and phone/fax numbers. Make sure the contact person and telephone number are obtainable when journalists are likely to call, many journalists work at night or early in the morning.
- Know the copy deadlines of your target media outlets.
- Make sure you issue your release on the best day for maximum coverage. Generally a release issued on a Monday or Tuesday will get better coverage than one released on a Friday.
- State the timing for release if not for immediate use, i.e., embargoed until date and/or time.
- Attach any visual material, photographs, logos, maps, diagrams

In terms of media release writing style, note the following:

- Use simple language and sentence construction. Avoid the use of jargon and clichés.
- Use positive words and phrases.
- Use short paragraphs - often one sentence is enough. Limit sentences to 25-30 words.

- Write names of people and organisations in full the first time they appear in the text. Add abbreviations in brackets afterwards [eg, First Impressions Community Exchange (F.I.C.E.)].
- Use quotes to make it more interesting.
- Write in the third person, eg, 'he said' or 'she said', not 'I said' or 'I was'.
- Do not use underlining - underlining is an editor's instruction to print those words in italics.
- Spell out numbers from one to nine, except for dates, times, prices, weights and measures, then use figures until they become unwieldy thousands of millions.
- Do not use the % sign, spell out "per cent" as two words.

Program Tool No 15 contains a series of press release examples that may be useful to build upon at various stages of the Program.



**Appendix no 3**

**CODE OF PRACTICE FOR VOLUNTEER AGENCIES**

To promote excellence in service and maximise the quality of volunteers' experience, this agency will:

- *Empower our volunteers to meet their own and agency needs.*
- *Offer volunteers work opportunities appropriate to their skills, experience and aspirations.*
- *Provide volunteers with clear duty statements and orientation to their work and the agency.*
- *Offer training and support for volunteers to achieve personal and work goals.*
- *Implement procedures to safe-guard volunteer safety and well-being.*
- *Offer re-imbusement or other compensation to cover out-of-pocket expenses.*
- *Recognise volunteers as valued team members, with opportunities to participate in relevant agency decisions.*
- *Provide mechanisms to acknowledge the value of contributions made by volunteers.*

(Adopted by Volunteers Australia)

## **Appendix no 4**

### **CODE OF PRACTICE FOR VOLUNTEERS**

To promote excellence in service and maximize the quality of my experience as a volunteer, I will:

- *Recognize my own motives for being a volunteer and ensure the agency is aware of these.*
- *Seek work opportunities appropriate to my skills, interests and aspirations.*
- *Be committed to give high quality service.*
- *Actively accept opportunities for job training and personal development.*
- *Carry out all work I agree to do, responsibly and ethically, and respect confidentiality.*
- *Speak out about any concerns that might affect my work relationships or quality of service.*
- *See myself as a valued team member with the right to contribute to decisions which might affect my work.*
- *Value and support other team members.*

(Adopted by Volunteers Australia)

## Appendix no 5

### **43 Ways to Recognise Volunteers**

1. Never stop saying 'Thank You'
2. Establish a volunteer suggestion box
3. Acknowledge volunteers by names at public events
4. Reimburse 'out of pocket' expenses
5. Send a birthday card
6. Hold an annual volunteer dinner
7. Invite volunteers to staff meetings
8. Recognise personal needs and problems
9. Accommodate personal needs
10. Establish a volunteer recognition board in a prominent position
11. Organise informal morning teas
12. Always greet by name
13. Provide continuous training
14. Ask for opinions and ideas
15. Hold regular idea generation sessions
16. Regularly organise photos in local newspaper of volunteers
17. Take time to talk about the job
18. Write references
19. Organise volunteers to attend conferences
20. Write personal 'thank you' notes
21. Invite participation in policy formation
22. Celebrate outstanding projects and achievements
23. Nominate individuals for volunteer awards
24. Carefully match volunteer with jobs
25. Praise volunteers to their friends
26. Plan staff and volunteer social events
27. Plan occasional extravaganzas
28. Send letter of appreciation to volunteers family and employer
29. Say 'we missed you' when absent
30. Award special awards for extraordinary achievements
31. Fully orientate new volunteers
32. Send Christmas cards
33. Organise community-wide, cooperative, inter-agency volunteer recognition events
34. Produce and distribute an organisational T - Shirt to all volunteers
35. Offer personal praise and recognition on the job, through the media and at public occasions
36. Give complimentary tickets to volunteers for special events and functions
37. Arrange discounts for volunteers at local businesses and events
38. Award life memberships, VIP recognition certificates
39. Hold social events in honour of volunteers
40. Create volunteer skill development opportunities
41. Farewell volunteers when they are retiring or moving away from the area
42. Arrange accreditation eg. Certificate 1 in Active Volunteering
43. Organise an annual 'Volunteer Appreciation Dinner'.

## Appendix no 6

# Action Planning Resources

*The following tools can be used to assist with the establishment of priorities and the development of action plans.*

## **A: Nominal Group Technique for Establishing Priorities**

### What is it?

- a rank ordering of ideas/actions;
- a statistically derived decision based upon individual ratings.

### The technique is accomplished by using:

- a numerical rating system, e.g., assigning items a priority where the most important item receives a value of 5 (if there are five items) and the least important receives a value of 1; or
- a visual rating system, e.g., assigning items a priority through the use of sticky dots e.g., participants are provided with a specified number of dots and are asked to place them on the items that are of the greatest priority; one or more dots can be assigned to an individual item.

### When do you use it?

- when there are many options to choose from;
- when the group wants to determine the importance of all items; and
- to help large groups make a decision.

### How do you use it?

- list all the items on a flipchart;
- participants individually assign a priority ranking to the identified items;
- the individual rankings are recorded on the flipchart;

- the rankings are totaled for each of the items/actions;
- the item that receives the greatest number of "votes" is the top priority; the item that receives
- the least number of votes is the lowest priority;
- action items are re-ordered according to the priority level that it received.

## **B: "Must Do, Should Do, Could Do" Priority Setting Worksheet**

### **A METHOD FOR SETTING PRIORITIES**

<b>(A) "MUST DO"</b>	<b>(B) "SHOULD DO"</b>	<b>(C) "COULD DO"</b>
Record action items that the working group feels must be implemented.	Record action items that the working group feels should be implemented.	Record action items that the working group feels could be implemented.

## **C: Pair Share for Establishing Priorities**

### What is it?

- a technique that allows individuals to think about their own ideas/opinions before sharing them with the larger working group;
- a technique that helps individuals to focus and express their concerns;
- allows for more in-depth discussions than would happen in a large group.

### How do you use it?

- write the question on the flipchart;
- provide participants with time to formulate their ideas/response;

- have participants divide into partners and share their responses;
- the partners may use their individual responses to create a new one;
- each pairing shares their report with the larger group;
- a discussion follows to reach consensus on actions and the priority assignment.

## **D. Consensus**

### What is it?

- a method for making decisions that all group members can live with and support;
- it is usually more successful in a small group (8 or less);
- a decision-making technique that allows for persuasion rather than coercion.

### How do you use it?

- state the reason/focus for the discussion, e.g., how would you rank these five items in terms of priority?
- ask for a recommendation and the associated rationale, i.e., have someone provide a priority ranking for the actions and explain why they have ranked the items in that order;
- have the group discuss the recommendation; everyone's opinion, knowledge and skills should be heard;
- ask for consensus, e.g., should we accept this recommendation?
- if everyone is not convinced, then ask for another recommendation and repeat the process until a decision is reached.

## **Action Planning Worksheet**

An Action Planning Worksheet needs to be completed for each Priority Action that is identified.

Identification of the individual steps that are required to complete the priority action can be identified through a brainstorming exercise.

## **Brainstorming**

### What is it?

- a method of quickly generating a lot of ideas, free of criticism and judgment.

### How do you use it?

- record the question on a flipchart; ensure that everyone has a clear understanding of what is being asked;
- challenge participants to be creative and think in new ways while breaking away from "what we've always done";
- use your imagination and build on ideas provided by others;
- allow a few minutes of "thinking" time;
- record ideas as given on a flipchart so that they can be easily seen by all; there are no bad ideas;
- discussion and evaluation does not occur during the initial brainstorming exercise;
- provide clarification of idea as required;
- when ideas have stopped, provide some additional thinking time; the brainstorming exercise will take between 5 to 20 minutes depending on the complexity of the topic;
- discuss, provide clarification and build on each idea following the second brainstorm;
- combine ideas that are similar; and
- finally, evaluate the ideas and reach agreement on the best ideas/actions.

Action	By Whom	Deadline	Resources & Support		Potential Barrier(s)	Communications Plan	Evaluation
What needs to be done?	Who will take the lead?	By what date will the action be done?	Available	Needed	What individuals or organizations might resist? How?	What individuals and organizations should be informed re: this action?	What will successful implementation look like?

***\*This Resource Sheet was compiled by the Rural Development Division of the Ministry of Agriculture, Food and Rural Affairs***



## **Appendix no 7**

### **EXAMPLES OF ECONOMIC DEVELOPMENT IN ACTION AT THE LOCAL LEVEL**

The following local actions and strategies are provided to stimulate thinking about the wide variety of initiatives that can be taken at the local and regional levels to enhance economic development and local job opportunities. These ideas are assembled under the six broad and interrelated approaches to stimulate economic life, identified within the Introduction and developed as Appendix 1.

#### **1. Initiatives to retain and expand local businesses.**

Evidence has clearly shown that more jobs are created through business expansion than through new business start-ups. The following initiatives focus on actions that assist local businesses to improve their productivity and market share.

Examples:

Campaign to examine the development of value-added products and product diversification (turning existing local products into consumer ready goods).

Provision of training programs to strengthen management and marketing capacities of local businesses.

Sponsorship of local business appreciation awards and events.

Introduction of mail order marketing for local products.

Creation and strengthening of business support networks such as business sector associations, "Business After Five Clubs" (where business people visit different enterprises and resource agencies to learn new ideas, resources and processes), "Entrepreneurs Breakfast Club", mutual support networks for sharing resources and expertise, etc.

Regular monitoring of Government purchasing patterns and needs to see what could be supplied locally.

Organisation of regular special events such as monthly market, swap meet, fun days, specialist conferences, workshops, exhibitions.

Sponsorship of special sporting events.

Co-ordination of group marketing exercises (especially relevant for the craft sector).

Provision of information on alternative and speciality crops and vegetables for farmers.

Establishment of a revolving loan fund to provide direct loan guarantees and other necessary financial assistance to qualified businesses.

Establishment of local arts and crafts counters or shelves in local motels, hotels and restaurants.

Use of retired management people to examine receivership situations to advise on possible ways that the company and/or debt can be restructured.

Development of the 'Telecentre' concept - introduction of modern tele-communication equipment, services and network facilities to improve local business efficiency and provide access to non local markets, maybe as a means of saving/expanding the local post office services.

Encouragement of more active involvement by local government in economic planning and action, eg, choosing to buy locally made goods, providing expertise and unused buildings, applying for grants to develop infrastructure, appointing specialist economic employment development officers, changing attitudes of key personnel (eg, building inspectors) from being reactive to proactive etc.

Survey of local resident's attitudes towards business products. This can provide existing firms with confidence to alter or diversify their products or services.

Production and publication of Profile Sheets and newspaper stories on local businesses, unique businesses, award winning businesses etc.

Brokerage service for exporting overseas.

Packaging of the unique features of the community as a theme or an event.

Franchising good local ideas to other communities.

Direct market approaches such as farmers markets, colourful roadside stalls, 'pick your own' facilities etc.

Use of special rate levy for the business community to fund a marketing and public relations campaign.

Organisation of retail improvement seminar followed up by individual on site consultations.

Assistance to local businesses to stay in the community.

Construction of town entrance statements highlighting local award winning businesses.

Organisation of special seminars/workshops focussing on local problems, eg, themes like "Life After a By Pass" for towns about to face a highway by pass, "Keeping the Family Farm in the Family", "Marketing Without Advertising".

## **2. Initiatives to encourage the formation of new businesses.**

This area includes a range of support to help potential new entrepreneurs to research and develop a viable business idea and obtain access to the appropriate skills and resources. Such actions encourage and support the creation of new businesses to add value to existing products, to meet changing consumer demands, or to capture sales which might otherwise go to other communities, regions or countries.

Increasingly, rural communities are discovering the new business potential in alternative tourism, small specialist manufacturing, information technology sectors, and alternative/speciality agricultural production.

Examples:

Provision of an integrated small business advisory service that supports local people so they can develop an idea into a business reality.

Provision of a local 'One Stop Shop' where people can gain information and assistance about establishing a business.

Provision of a regular updated register of available work space areas.

Organisation of workshops on the establishment of new home-based industries in such areas as bed and breakfast provision, food preparation, craft production etc.

Co-ordination of publicity regarding success stories and making more widely available "How to ....." information.

Organisation of a competition for new enterprising ideas.

Development local industrial or commercial work space.

Encouragement of local loan sources for new businesses such as local credit union.

Establishment of a local investment fund.

Development of an "Angel" network involving retired or semi-retired business people who are willing to provide venture capital for a local project in exchange for the excitement of being involved in a new local enterprise.

Provision of informal group guarantee arrangements where a group of people collectively take out a small loan and agree to guarantee each other.

Support to existing financial institutions establishing separate accounts dedicated to local economic development.

Organisation of regular idea generation workshops and entrepreneur training programs.

Instigation of projects which foster an enterprising spirit among local youth such as the "Livewire Youth Business Competition", a youth enterprise centre etc.

Research into, and promotion of interesting business ideas from outside the community such as looking at newspapers from overseas/interstate.

Exploration of new trends and their potential business opportunities, eg, women in the workforce; growing proportion of senior citizens; more awareness of fitness and health, growing appreciation of the environment; 'green tourism'; experiential holidays, etc.

### **3. Initiatives to attract outside business and resources.**

This involves actions which assist in bringing new investment, employment and funding to the community.

Examples:

Development of local industrial, office or commercial parks, workspaces, buildings.

Regular promotion strategies of the community and its commercial advantages, such as producing a video or a community fact book.

Study of local consumer needs and expenditure to identify new services that could be 'head hunted'.

Targeted searches for businesses which might be most suited to one's community and its future, eg, traditional crafts for a historical crafts space, manufacture of period furniture for a historical workspace, etc.

Targeted searches for businesses which might be interested in a local branch operation or local franchise.

Attraction of someone with a unique collection to establish a permanent museum, exhibition centre or display.

Encouragement of former residents with business success to "come home" and start a business or invest in ventures started by others.

Targeting of professionals to establish businesses, (especially those with 'weekenders' within the region) through the provision of shared office space complexes.

Organisation of business and lifestyle attraction campaign - attracting people with business skills in the area.

Regular monitoring of all government funding programs and services.

Regular review of available philanthropic trust funds.

Encouragement of retired people to remain in the area rather than move away. Recreation, housing and home care are all important areas. Transfer payments and income from investments earned by retirees are often significant for local purchasing and investment.

Full utilisation of government employment and training schemes.

Lobbying for specific projects, offices, facilities and services.

Encouragement of higher enrolment at local educational institutions and enhanced education services and facilities.

Development of "one stop" information/service centres that provide an outlet for a range of government departments and agencies.

Attraction of part-time presence of government agencies through provision of shared office facilities.

Design of new services and targeting of the corporate sector for sponsorship.

Identification and targeting of government officials sympathetic to community development.

#### **4. Initiatives to 'Plug the Leaks' in the local economy.**

Communities can limit the amount flowing out or 'leaking' from their local economy. Leaks occur whenever residents spend at regional shopping centres, invest in out-of-town businesses, holiday or recreate away from home, or pay for services from firms which commute into the area. Leaks also snowball because if residents travel to buy one item which is not available locally, they tend to buy other items while they are out of town. Obviously no community can keep all the dollars that circulate, but it is important that communities improve their ability to retain as much local income as possible.

Examples:

Plan "Buy Local" campaigns to counter the reasons people give for shopping out of town. Such myths include higher prices, better selection, inconvenience etc.

Establishing a matchmaker program to identify imported products and services which could be provided by local businesses.

Identification of local consumer needs and buying habits, and publication of the results.

Provision of an employee training program to improve the quality of service, eg introduction of the Aussie Host Customer Service Program.

Provision of community recognition awards for best employees - the aim is to make customer service more friendly and efficient.

Co-ordination of monthly and annual business awards for excellence - targeting various sectors.

Publication of a local business service directory.

Establishment of a community-owned company to help retain services, eg, Community Bank.

Operation of agency arrangements for different government departments through a community company or local government council.

Marketing of locally produced goods/services, through business directories, special sales etc.

Introduction of community recycling and waste separation programs, and schemes to improve insulation and energy consumption.

Identification and head hunting of services to a community which are presently unavailable.

Reduction of infrastructure costs of local government - using a reward system for employees to suggest improvements to productivity and cost reduction.

Co-ordination of a doorknock campaign of every resident asking what was needed to keep them in the community.

## **5. Initiatives that enhance the job linking capacity of a community and thus the flow of people into jobs.**

This involves actions that utilise community development processes and social networks to support the job search activities of unemployed people, to help fill job vacancies more quickly, to discover hidden job opportunities, to improve information flows regarding job creation assistance and to help counter attitudinal reasons why some employers may not be increasing their workforce.

Examples:

Awareness and door knock campaigns targeting employers about wage subsidy and other forms of support.

Use of the yellow pages and direct telephoning to directly canvas local businesses for job vacancies.

Preparation of publicity summarising all forms of job assistance available locally.

Organisation of a job-mate scheme which links a job seeker to a job-mate. The job-mate provides one-to-one mentor support in the search for work.

Provision of a free job advertisement in the local newspaper for out-of-work people to advertise their skills.

Provision of a free radio spot service for out of work people to advertise their skills.

Promotion of local Traineeships.

Provision of a casual labour exchange which provides a focus for notifying casual work opportunities and provides a direct link to the out of work with appropriate skills.

Instigation of an agency that co-ordinates the seasonal needs for farmers with people looking for work.

Maximum utilisation of Government employment programs to create local jobs, eg, works programs, conservation schemes etc.

Organisation of a local group apprenticeship/traineeship scheme where a group of employers collectively employ a group of apprentices/trainees.

Recognition of employers who employ local young people.

A door knock campaign of every employer as part of a community job awareness program, eg, 'give an unemployed community member a job', 'take on an extra apprentice' campaigns etc.

Organisation of an "Employ Me" competition where school leavers and the unemployed enter a poem, essay or cartoon on the theme "Employ Me". Publish the best in the local newspaper.

Organisation of a regular door knocking campaign of businesses to find out skill shortages and develop immediate short courses to fill local job needs.

Organisation of community job clubs where job seekers can learn job search skills and support each other through sharing information and job leads.

Establishment of a Local Employment Trading Scheme (L.E.T.S) where employment skills are bartered.

Creation of Regional Training Trust to act as an official training provider.

Organisation of a local support program for redundant workers as soon as possible after the redundancy or preferably prior to the factory or office closing, including a systematic telephone program re job vacancies of every business within a certain radius of the community.

Preparation of a community skills register.

Promotion campaigns to encourage employers to create extra jobs - use of incentive prizes.

Co-ordination of an "Adopt a School" program by local businesses - Educational Compacts.



Establishment of a Rural Youth Information Service.

Co-ordination of a community campaign to add new jobs to the community, eg, 'Many hands make Christchurch work', Project Employ Youth etc.

## **6. Initiatives that market the community.**

This includes actions that enhance the appeal and image of a community to potential visitors and new settlers.

Examples:

Adoption of Mainstreet program - including research into original condition and colour of buildings, provision of a free architectural service, advice on restoration techniques, organisation of discount paint schemes, cash grant scheme to help with design work, building code flexibility, street furniture, tree planting.

Promotion of heritage redevelopment.

Co-ordination of town beautification and landscaping - including improvements to town entrances.

Co-ordination of heritage trail development - offering visitors a framework with points of reference.

Development and publication of regional special interest trails, eg, flower trail, sea coast recreational trail, a hand made treasure trail featuring quality crafts people.

Co-ordination of "Country Village Weekend Breaks" program - a rural tourism marketing initiative which promotes packaged weekends to selected villages across the country.

Development of a theme(s) for the town.

Construction and maintenance of toilets on the main street - need to be well sign posted.

Targeted packaging of a community publication, eg, "Spend a day in ..." brochure, incorporating a series of tourist drives, preparation of car rally packages etc.

Use of museum exhibits to improve attraction of buildings and services.

Promotion of retirement support services.

Attraction of businesses which encourage people to stop, such as a hot bread shop, antique shop, country gardens etc.

Preparation and distribution of a local promotional brochure, post cards, maps and T shirts.

Promotion of the town's famous sons and daughters.

Organisation of special market days.

Development of facilities/activities targeting children, eg, special playgrounds, activity books focussing on things to do in the region.

Improvements in the quality of life to encourage people to live there, such as maintaining or establishing a full range of medical services, increasing recreation opportunities etc.

Filling of empty shop windows with local displays etc.

Creative use of murals on toilet blocks, bus stops, playgrounds, public buildings etc.

Promotion of the 'only one in Australia' attractions or the unique 'lifestyle' of the community.

Production of local song/jingle.

Surveys of local residents regarding what they feel they miss by living in a rural community, and trying to respond with practical projects.

Staging of an annual award, exhibitions, attracting entrants from around the country, eg. Wood Turners Annual Award Exhibition.

Co-ordination and co-operative marketing of home stay accommodation, local guides, colonial accommodation etc.

Identification and promotion of specific themes or events based on cultural, historical or natural strengths.

Promotion of special features, eg, unique meals/dishes/drinks etc.

Publication of regular calendar of local events.

Promotion of alternative interpretive forms of tourism.

Development of innovative and attractive playground equipment.

Development of a town strategy to get passing traffic to stop.

Development of a systematic signage system for towns by-passed that covers all major services and shops.

Formation of a community 'image' committee.

Regular publication in larger urban areas of the benefits of moving to one's community, eg, comparing housing costs etc.

Renovation of unused farm cottages/buildings for non-farm enterprises and or attractions.

Development of possible base tourism sites/products in the area.

Establishment of local information centre with volunteer ambassadors.

## **Appendix no 8**

### **CONDUCTING EFFECTIVE COMMUNITY MEETINGS**

Community meetings are an important tool to solicit and maintain community interest and involvement in community economic development. To ensure effectiveness, attention needs to be given to many aspects before, during and after the meeting.

Suggestions:

#### **1. Before the meeting**

- Determine a date and time which you believe is the most convenient for members of the community. Avoid clashing with other regular community meetings or major sporting events. Consider the most convenient time to ensure maximum participation.
- Determine the best venue. Keep in mind issues like comfort, temperature, opportunity to socialise, acoustics, transport, parking and accessibility.
- Consider the possibility of offering child care facilities.
- Ensure community members received adequate notice - use every creative means to inform and encourage attendance - mailouts, pamphlets, posters, personal invitations, announcements at churches, statements in school bulletins, radio, announcements, press statements.
- Make sure any outside speakers or resource people receive written notification, a map and background information. Ensure they arrive well before the meeting - provide them with a (written) briefing.
- Select an experienced chairperson - who understands the purpose, has excellent public speaking skills and demonstrates a positive approach.
- Ensure an adequate PA system is available.
- Arrive early to set up appropriate room arrangements. People participate best when they can see each other and are close to speakers or resource people. Generally chairs arranged in a horseshoe formation close to speakers is best. Avoid straight rows and placing presenters and leaders on stages or behind tables!

- Ensure adequate seating, but do not put out all chairs, otherwise front rows will remain empty.
- Ensure a layout style which has participants with their backs to entry point.

## **2. During the meeting**

- Provide name tags, and have people to welcome participants on arrival.
- Organise decor, entertainment and refreshments which reinforce a warm, welcoming and interacting atmosphere, eg, pre-meeting tea or coffee, background music, displays, post meeting refreshments to encourage people to stay around afterwards.
- Start on time.
- Provide a warm welcome to all, and any special guests. Clearly state purpose of meeting (use overheads or flip chart paper to reinforce key points and agenda where possible).
- Encourage audience reaction and contribution.
- If meeting involves controversial issues and/or brainstorming functions, ensure ground rules are mentioned and/or distributed.

Example of ground rules.

1. Check in old disputes, feuds and ideologies at the door!
  2. Anything goes! Don't be afraid of new ideas. Respect the opinion of others.
  3. Keep ideas, opinions and comments short.
  4. Allow everyone to contribute.
  5. Focus on the positive. Avoid spending time blaming others and dwelling on what has not happened in the past.
- Appoint someone as scribe to record the key points and decisions.
  - At the end of the meeting, provide a summary of any agreed outcomes and future actions.
  - Thank people for coming, and if post meeting refreshments are provided encourage them to stay on and enjoy it.

- Acknowledge individuals/groups who have contributed to the organisation of the meeting.

### **3. After the meeting**

- Make sure outcomes of meetings are communicated to participants and the wider public via press, mail outs, flyers or pamphlets, use of radio talk shows and phone in programmes.
- Seek feedback from participants.

## Appendix no 9

### **TIPS FOR MAINTAINING COMMUNITY INTEREST AND INVOLVEMENT**

#### **A KEEPING TASKFORCE MEMBERS/ACTIVE PARTICIPANTS INVOLVED AND INFORMED**

- Frequent telephone calls
- Meetings at convenient times
- Creation of a newsletter
- User friendly minutes
- Regular acknowledgment of individual and group contributions (eg, comments at public meetings, over radio and within newspaper articles, awards etc)
- Regular and fun times to celebrate achievements (have a celebration coordinator as a committee position)

#### **B KEEPING THE WIDER COMMUNITY INFORMED AND SUPPORTIVE**

- Regular news column in a local newspaper(s)
- Regular distribution of press releases
- Use of any media opportunity to highlight initiatives
- Use of radio talkback programmes
- Addresses to schools, services clubs, churches and other organisations
- Regular community consultation and feedback sessions
- Frequent publication of 'user friendly' reports, brochures, flyers, posters
- Public acknowledgment of sponsorship and support (eg, quarterly newspaper acknowledgment ad, acknowledgment on brochures and documents etc)

#### **C KEEPING THE OUTSIDE COMMUNITY INFORMED AND SUPPORTIVE**

- Identification of champions (politicians, civic leaders, sports people, prominent ex-residents) willing to regularly *'blow the trumpet'* for the community
- A regular mail out to a targeted mailing list (including annual and user friendly progress statement)
- Regular media exposure (radio, television, newspapers, journals)
- Participation in regional and national forums and networks
- Briefing/lobbying trips to state and national capitals
- Getting to know key political, bureaucratic and industry influentials on a personal level
- Finding reasons for influentials to visit, *'Declare Something Open'*, socialise with members etc
- Sponsorship of community members to attend regional and national conferences, workshops and training events
- Generous acknowledgment of outside support

## **Appendix no 10**

### **SUMMARY OF RECOMMENDATIONS FROM B.E.A.R. PROGRAMS**

#### **A. COOROW**

In August 1998, the town of Coorow became the first Australian town to undertake the B.E.A.R. Visitation Program. 18 community volunteers conducted interviews with 45 businesses.

The resultant Action Plan contained:

- (i) 9 key recommendations, namely:
  - follow-up community meetings;
  - formation of a co-ordinating group;
  - establishment of a Telecentre;
  - utilisation of the services of the North Midlands Business Enterprise Centre;
  - promotion of a steel fabrication services and engineering business opportunity;
  - development of townscaping;
  - opening of new serviced land (industrial, residential, commercial);
  - providing employee housing, and
  - undertaking business consumer survey
  
- (ii) A draft Action Plan containing 5 broad strategies, namely:
  - Strategy 1 – Business development and attraction (12 actions)
  - Strategy 2 – Attraction of people and skilled employees (6 actions)
  - Strategy 3 – Tourism development (7 actions)
  - Strategy 4 – Keeping money in the community and plugging the leaks (3 actions)
  - Strategy 5 – Keeping the vision alive (9 actions)

#### **B. CARNARVON**

The town of Carnarvon, as part of their *Positive Carnarvon Program* undertook this project from November 1998 to January 1999.

It resulted in a total of 39 recommendations within five broad areas, namely:

- Business networks (3 recommendations)



- Business assistance (3 recommendations)
- Government matters (4 recommendations)
- Skilled labour and training (7 recommendations)
- Social issues (12 recommendations)

### **C. QUEENSLAND TOWNS**

The Queensland Department of Tourism, Regional Development and Industry have placed summary reports of three Queensland towns on their website ([www.dtrdi.qld.gov.au](http://www.dtrdi.qld.gov.au)), namely Malanda, Crows Nest and Innisfail.

## **Appendix no 11**

### **RELEVANT B.E.A.R. PROGRAM REFERENCES AND WEBSITES**

Bolton, R., People Skills (Prentice-Hall, 1986)

BR and E Ontario, Business Expansion and Retention Resource Kit, (2002)

Esmond, J., Count Me In!: 501 Ideas on Recruiting Volunteers (Victoria Park, 2001)

Loveridge, S and Morse, G., Implementing Local Business Expansion and Retention Visitation Programs (1996)

Loveridge, S and Smith, T., 'Factors Related to Success in Business Expansion and Retention Programs' in Journal of the Community Development Society, Vol 23, no 2, 1992

Morse, G., The Retention and Expansion of Existing Businesses – Theory and Practice in Business Visitation Programs (Iowa State University Press, Ames, 1990)

Woodhouse, A. and Janssen-May, S., "Surviving and Thriving in North Queensland..Social Capital in Action" in *Sustaining Regions*, vol 3, no 3, Winter 204..31-38

Business Expansion and Retention International web site  
<http://www.brei.org>      <http://www.breimc.org>

Department of Trade, Regional Development and Industry's  
Business Retention and Expansion Program  
<http://www.dtrdi.qld.gov.au>

## Appendix no 12

### **NOTES ON THE FIRST IMPRESSIONS EXERCISE**

F.I.C.E. is a structured, fun and inexpensive initiative that reveals the first Impression that a community conveys to outsiders, including tourists and potential business operators, young workers, retirees and settlers. It offers a fresh perspective and valuable feedback from a neutral source with no local vested interests.

F.I.C.E. involves two communities with similar socio economic characteristics agreeing to exchange volunteer visiting teams to conduct unannounced and incognito visits, record their observations and provide constructive feedback to their exchange community.

The knowledge and feedback gained through a First Impressions Community Exchange then becomes the basis for positive action that could focus on such areas as mainstreet revitalisation, tourist development, business and investment attraction, customer service enhancement or broader community and economic strategic planning efforts.

***"The real voyage of discovery consists not in seeking new landscapes, but having new eyes". (Marcel Proust)***

**Appendix no 13**

**SAMPLE OF A CONSUMER SURVEY**

We eagerly await your opinions. If you cannot fill this survey in immediately, please return it to:

\_\_\_\_\_ by \_\_\_\_\_

1. Do you do most of your shopping locally? Yes  No

Note: 'Yes' means that you visit local businesses regularly and spend at least \$100 per week.

If No, can you give your reason(s) for shopping elsewhere?

.....  
.....  
.....  
.....

2. Are you happy with the variety of shops and services in this area? Yes  No

3. Do you live in this area? Yes  No   
If No, where do you live?

.....

4. For each of the following items can you tick up to four reasons that influence you when you buy:

<b>Most shopping items</b>		<b>Groceries</b>		<b>Meat</b>	
Price	<input type="checkbox"/>	Price	<input type="checkbox"/>	Price	<input type="checkbox"/>
Range (variety)	<input type="checkbox"/>	Range (variety)	<input type="checkbox"/>	Range (variety)	<input type="checkbox"/>
Quality	<input type="checkbox"/>	Quality	<input type="checkbox"/>	Quality	<input type="checkbox"/>
Shopping Hours	<input type="checkbox"/>	Shopping Hours	<input type="checkbox"/>	Shopping Hours	<input type="checkbox"/>
Parking	<input type="checkbox"/>	Parking	<input type="checkbox"/>	Parking	<input type="checkbox"/>
Transport	<input type="checkbox"/>	Transport	<input type="checkbox"/>	Transport	<input type="checkbox"/>
Attitude of Staff	<input type="checkbox"/>	Attitude of Staff	<input type="checkbox"/>	Attitude of Staff	<input type="checkbox"/>
Speed of Service	<input type="checkbox"/>	Speed of Service	<input type="checkbox"/>	Speed of Service	<input type="checkbox"/>
Atmosphere	<input type="checkbox"/>	Atmosphere	<input type="checkbox"/>	Atmosphere	<input type="checkbox"/>
Convenience	<input type="checkbox"/>	Convenience	<input type="checkbox"/>	Convenience	<input type="checkbox"/>
<b>Clothing</b>		<b>Hardware</b>		<b>Appliances</b>	
Price	<input type="checkbox"/>	Price	<input type="checkbox"/>	Price	<input type="checkbox"/>
Range (variety)	<input type="checkbox"/>	Range (variety)	<input type="checkbox"/>	Range (variety)	<input type="checkbox"/>
Quality	<input type="checkbox"/>	Quality	<input type="checkbox"/>	Quality	<input type="checkbox"/>
Shopping Hours	<input type="checkbox"/>	Shopping Hours	<input type="checkbox"/>	Shopping Hours	<input type="checkbox"/>
Parking	<input type="checkbox"/>	Parking	<input type="checkbox"/>	Parking	<input type="checkbox"/>
Transport	<input type="checkbox"/>	Transport	<input type="checkbox"/>	Transport	<input type="checkbox"/>
Attitude of Staff	<input type="checkbox"/>	Attitude of Staff	<input type="checkbox"/>	Attitude of Staff	<input type="checkbox"/>
Speed of Service	<input type="checkbox"/>	Speed of Service	<input type="checkbox"/>	Speed of Service	<input type="checkbox"/>
Atmosphere	<input type="checkbox"/>	Atmosphere	<input type="checkbox"/>	Atmosphere	<input type="checkbox"/>
Convenience	<input type="checkbox"/>	Convenience	<input type="checkbox"/>	Convenience	<input type="checkbox"/>

If you do not buy these items locally, in which town, area or shopping centre(s) do you buy them?

.....

5. From your own experience how would you rate staff in local shops in terms of the following:

<b>Helpfulness</b>		<b>Product knowledge</b>		<b>Friendliness</b>	
Extremely good	<input type="checkbox"/>	Extremely good	<input type="checkbox"/>	Extremely good	<input type="checkbox"/>
Good	<input type="checkbox"/>	Good	<input type="checkbox"/>	Good	<input type="checkbox"/>
OK	<input type="checkbox"/>	OK	<input type="checkbox"/>	OK	<input type="checkbox"/>
Bad	<input type="checkbox"/>	Bad	<input type="checkbox"/>	Bad	<input type="checkbox"/>
Extremely bad	<input type="checkbox"/>	Extremely bad	<input type="checkbox"/>	Extremely bad	<input type="checkbox"/>
Comments		Comments		Comments	
.....		.....		.....	
.....		.....		.....	

6. What changes should local shops make to get more of your business? (please choose up to five (5) changes from the list below)

More competitive pricing	<input type="checkbox"/>	More variety	<input type="checkbox"/>
Better quality goods	<input type="checkbox"/>	Longer opening hours	<input type="checkbox"/>
Better parking	<input type="checkbox"/>	Better customer service	<input type="checkbox"/>
Day/weekend parking	<input type="checkbox"/>	More special events	<input type="checkbox"/>
More advertising	<input type="checkbox"/>		

Any other suggestions: .....

.....

.....

7. Are there any existing shops or services in this area that you would use more if some things were changed?

Yes  No

If "yes", what would you change and why?

.....  
.....  
.....  
.....

8. Are there any businesses or services which you believe are missing in this area: If so, which?

.....  
.....

9. Are there any final comments you would like to make about services or businesses in this area:

.....  
.....  
.....

**Thank you for your cooperation**

(this survey was adapted from a tool prepared for the Doing More with Agriculture Project)

## Appendix no 14

### **SAMPLE OF A COMMUNITY ASSESSMENT SURVEY**

The following survey should be filled in by each member of the local leadership team prior to our first team meeting. Its aim is to assist with formulating thoughts about the strengths, limitations and opportunities of our community, and its preparedness for economic development. It will provide some valuable thoughts for our initial discussions:

Community: \_\_\_\_\_ Date: \_\_\_\_\_

1. What is your perception of the attitude in your community concerning its future?

- |                                      |                                       |   |
|--------------------------------------|---------------------------------------|---|
| <input type="checkbox"/> progressive | <input type="checkbox"/> conservative | <input type="checkbox"/> middle of the road |
| <input type="checkbox"/> positive    | <input type="checkbox"/> negative     | <input type="checkbox"/> other              |

Comment:

2. How do you perceive the economic status of your community?

- |                                  |                                    |                                 |
|----------------------------------|------------------------------------|---------------------------------|
| <input type="checkbox"/> growing | <input type="checkbox"/> declining | <input type="checkbox"/> stable |
|----------------------------------|------------------------------------|---------------------------------|

3. What are your community's strengths? List the top five, in order of priority.

- 1.
- 2.
- 3.
- 4.
- 5.



4. What do you consider to be the best two advantages of living in your community?

- 1.
- 2.

5. What do you consider to be the five main weaknesses in your community, in order of severity?

- 1.
- 2.
- 3.
- 4.
- 5.

6. What do you estimate as the make up of your community's economic base (wealth creation)? List by percentage of 100%.

Agriculture _____ %	Industry/manufacturing _____ %
Retail _____ %	Tourism _____ %
Government _____ %	Service _____ %
	Other _____ %

7. What do you estimate as the employment make up of your community? List by percentage of 100%

Agriculture _____ %	Industry/manufacturing _____ %
Retail _____ %	Tourism _____ %
Government _____ %	Service _____ %
	Other _____ %

8. Do you feel your local council is supportive and proactive in terms of economic development?

- Yes  No

Comment:

9. Does your community have a focus and organisation for local economic development?

- Yes  No

Comment:

10. What businesses/industries has your community lost in the last three years?

11. What major community improvements have been completed in the last three years

12. What do you feel is needed to stimulate your community economy?

- |  |  |
|--|--|
| <input type="checkbox"/> more attractive main street | <input type="checkbox"/> more jobs                             |
| <input type="checkbox"/> better industrial area      | <input type="checkbox"/> improved organization and development |
| <input type="checkbox"/> more businesses             |  |
| <input type="checkbox"/> better infrastructure       | <input type="checkbox"/> better housing                        |
| <input type="checkbox"/> other                       |  |

13. Does your community have an action plan for the future?

- Yes  No

Comment:

14. Do you feel that local residents are involved in local economic development activities and local decision making?

- Yes  No

Comment:

15. Do you feel you are involved in local decision making? In what way, or why not?

16. Do local development groups (council, service clubs, tourism association, Development association etc) plan together and cooperate in terms of future development?

Comment:

17. Does your community and neighbouring communities collaborate together to achieve a positive economic future, or see each other as rivals?

Comment:

18. Finally, what changes would you like to see in your community/region in the next three years?

## **Appendix no 15**

### **SAMPLE OF A RESIDENT SURVEY**

Residents of .....,

We are looking for your input. How about starting by sharing some of your thoughts about our community?

#### **1. Tell us what it is like to reside in our community**

Your street?

Your shopping centre?

Your community facilities (library, child health, sports etc)?

Other aspects?

#### **2. What has either brought you to live in our community or kept you here?**

#### **3. Tell us of the best experience you have had living in our community**

What happened?

What did you do?

What made it a good experience?

- 4. Imagine that your community has won the National Australian Community of the Year competition. What do you think would have happened to deserve this win?**
  
  
  
  
  
  
  
  
  
  
- 5. If there was one thing you could change in our community, what would it be?**
  
  
  
  
  
  
  
  
  
  
- 6. What assets or strengths does our community have as a community to build on?**
  
  
  
  
  
  
  
  
  
  
- 7. What is the one aspect about our community that you want to make sure we retain?**

**Thank you for taking the time to fill out this survey. Please return this form to:**

.....(person), at .....(address) , by .....(date)

## Appendix no 16

### SAMPLE OF A VISITOR SURVEY

Dear Visitor,

The ..... is developing a development plan for the community and we would be very grateful if you would take part in this short survey since the most important aspect of any strategy plan is to know what our customers feel about the community.

1. For what purpose are you currently visiting ..... (please tick one of the following)?  
  
Day trip        Staying Overnight        If so, how many nights? \_\_\_\_  
Business        Passing through        If so, to where? \_\_\_\_  
Other (please specify)
2. Have you visited our community before?  
  
No, this is my first visit      
Yes, I have been here    ...    times before.
3. What attracted you to visit .....?
4. What will you be seeing/doing during your current visit?
5. What do you think are the main attractions for visitors in .....?
6. Do you have any criticisms/comments to make about ..... from a visitor's perspective?
7. Can you suggest attractions/events/improvements to attract more visitors, which are currently not available?
8. If you had to devise a logo for ....., what key features would you include?
9. Do you have any other ideas or suggestions for the development of our community?

