

**THE BUSINESS  
EXPANSION  
AND  
RETENTION PROGRAM**

**- The B.E.A.R. Program -**

**A  
Community Volunteer Interviewer  
Handbook**

**Thankyou for being a  
Community Volunteer  
Interviewer and making  
the B.E.A.R. Program  
possible in our community.**

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**The Golden Rule**  
**'Business stays and expands where it is well treated and appreciated'**

## **A. INTRODUCTION**

One characteristic of a vibrant local economy and community is visible appreciation, understanding and support for its existing business base. Existing local businesses represent the engine for continuing economic activity and new jobs in any local economy. Evidence shows that they are 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
- often acting as an attraction for outside businesses to relocate or establish within the community.

It is vital to have community initiatives which focus on listening to, and helping existing businesses to do better. The Business Expansion and Retention (B.E.A.R.) Program is one such initiative. Created in the USA over 20 years ago, the B.E.A.R. Program now operates throughout USA, Canada, New Zealand, South Africa and in most states of Australia.

The key element of the B.E.A.R. Program is a systematic visitation of local businesses by teams of Community Volunteer Interviewers who gather information about business concerns, perceptions and ideas.

## **B. B.E.A.R. PROGRAM OVERVIEW**

### **GOAL**

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

### **DESCRIPTION**

The Business Expansion and Retention (B.E.A.R.) Program is simply a gigantic community dialogue with owners and operators of local businesses about what helps and hinders their business activities and ideas they have to improve the local business environment.

It involves the formation of a local Taskforce to lead, design and oversee the implementation of the dialogue, and the use of Community Volunteer Interviewers and a structured interview questionnaire.

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 is preventing expansion;
- identification of businesses considering relocation outside the community and why;
- perceptions about government actions that help and hinder local businesses;
- opportunities for match making local businesses;
- current and future labour and market needs; and
- new ideas for improving the local economy and business environment.

The ideas and issues raised through the dialogue and questionnaire provide the basis for:

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

### **OBJECTIVES**

#### **Short term:**

- To demonstrate and communicate community support for local business.
- To raise the profile of businesses within the local community.
- To discover the concerns, successes, needs, issues and aspirations of local businesses.

- To encourage new ideas in terms of business and employment development.
- To respond to immediate business concerns.

**Long term:**

- To enhance the competitiveness of local businesses and minimise economic leakage from the local economy.
- To identify windows of opportunity for new business creation, business growth, business matchmaking and networking.
- To design and implement strategic action plans for community economic development.
- To create a broad based community coalition to sustain long term economic development efforts.

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

**STAGE 1. Planning**

1. Assessing the level of community interest and support for the Program.
2. Forming of a local leadership team (Taskforce) to manage the Program.
3. Agreeing on the scope and nature of the Program, and other community economic development initiatives to gather supplementary information relating to local business life issues.
4. Securing of necessary financial and human resources including a Project Coordinator.
5. Launching and promoting the proposed Program.
6. Identifying and contacting businesses to be visited.
7. Recruiting and training of Community Volunteer Interviewers.

**STAGE 2. Visitation**

1. Implementing a systematic visitation of local businesses using the survey questionnaire.
2. Instigating immediate follow up regarding referrals and concerns.

**STAGE 3. Analysis**

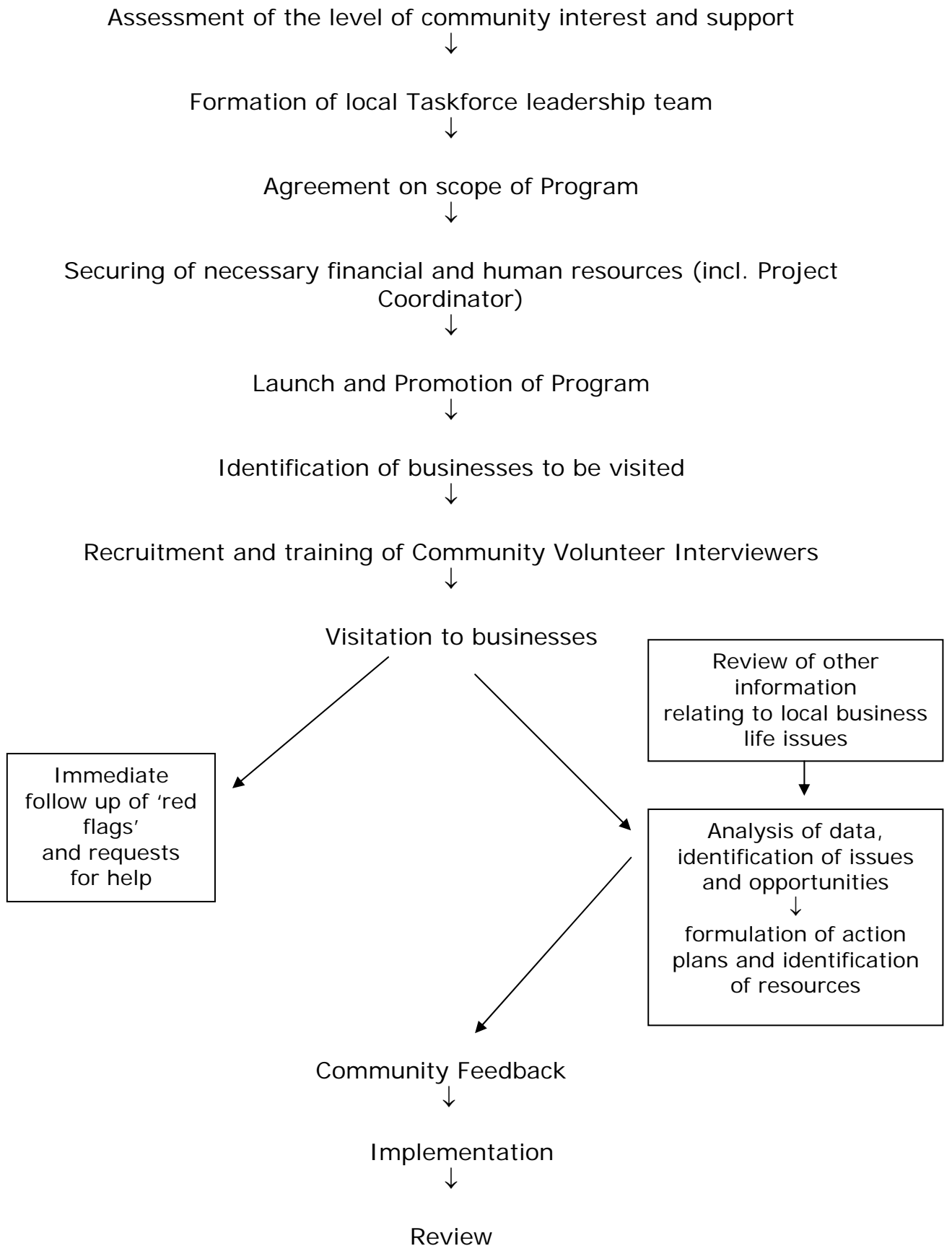
1. Organising data analysis and analysing of survey results.
2. Identifying 'red flag' issues and opportunities.

3. Reviewing other information relating to local business life issues.
4. Formulating action plans to improve the community as a place to do business.
5. Identifying possible resources to implement action plans.

**STAGE 4. Community Feedback and Action**

1. Sharing of Program results and outcomes via the media and through business and community meetings.
2. Implementing action strategies.
3. Ongoing review of action strategies to assess impact and soliciting feedback.

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



## **KEY PLAYERS - ROLES AND RESPONSIBILITIES**

The B.E.A.R. Program involves five key players, namely:

### **i. Program Sponsors**

This project is a joint initiative of the following sponsor(s):

*(insert sponsors name(s))*

These group(s) have collaborated together to introduce and implement the Program to this community. Program sponsors have been responsible for:

- providing the necessary funding to run the Program;
- establishing local leadership team - the Taskforce (see below);
- providing administrative support; and
- promoting the concept of the B.E.A.R. Program.

### **ii. Taskforce**

The Taskforce is the local leadership team responsible for introducing, managing, promoting and implementing the Program. The Taskforce has already been involved in such decisions regarding:

- determining scope and nature of the program;
- agreeing on survey questionnaire content and structure;
- instigating program promotion;
- timetable;
- securing necessary resources
- selecting and managing the Project Coordinator; and
- assisting with volunteer and business recruitment.

Taskforce members will in the future be involved with:

- participating in the visitation as Community Volunteer Interviewers;
- ensuring ongoing promotion;
- following up responses to business 'red flags' and requests;
- formulating and implementing a community economic development action plan; and
- providing feedback of results and outcomes to the community and local businesses.

In summary, the Taskforce's primary responsibilities are management, follow up and implementation of action.

### **iii. Project Coordinator**

A Project Coordinator, *(insert Project Coordinators name)*, has been appointed by the Taskforce. *(insert Project Coordinators name)* is responsible for providing some 'arms and legs' to the Project and to ensure the following –

- managing the B.E.A.R. Program and its work plans;
- recruiting, training and supporting of Community Volunteer Interviewers;
- compiling a local Business Resource Kit;
- ensuring insurance cover for all Volunteer Community Interviewers;
- developing local promotional material and press releases
- coordinating the business visitation stage (including allocation of businesses to be visited) and collection of survey results;

- enforcing the confidentiality condition;
- coordinating of responses to immediate business 'red flags' and requests for assistance;
- organising of survey analysis and response strategy design;
- assisting with the feed back to community on results and outcomes; and
- facilitating of the implementation of follow up actions.

**iv. B.E.A.R. Facilitator**

This project has the benefit of the support of *(insert B.E.A.R. Facilitator name)* who has been trained to facilitate the introduction of the B.E.A.R. Program.

*(insert B.E.A.R. Facilitator name)* has been involved in the following areas –

- *(insert roles taken by B.E.A.R facilitator)*
- 
- 
- 

**v. Community Volunteer Interviewers**

That's you! and thanks again for your willingness to take on this responsibility. Your role and job description is outlined in the next section of the handbook.

## C. THE COMMUNITY VOLUNTEER INTERVIEWER ROLE

***"Volunteers are such an essential part of our communities that without them, the whole fabric of society would be placed at risk".***

(Sir Ninian Stephens, former Governor General, Australia)

Community Volunteer Interviewers play a vital role in the B.E.A.R. Program. They are the ambassadors and public face of the Project. Their key roles through interviews with local business owners / managers are to gather and record information from local businesses, and communicate the community's appreciation and support for local business. Interviewers, following mandatory training, are paired into teams. Each team is responsible for visiting approximately four to six local businesses.

### **Job Description**

The primary roles of Community Volunteer Interview teams are –

- demonstrating community interest and support for local businesses;
- distributing a Business Information Kit containing helpful information and contacts related to local business support and labour market programs;
- recording information about local business successes, perceptions, needs and ideas;
- gathering information about perceived strengths and limitations of the local business environment; and
- describing any special requests for assistance, or concerns that need prompt attention.

The principal role of Community Volunteer Interview teams is simply to gather information and opinions.

IT IS NOT TO –

- defend existing policies, programs or institutions;
- offer advice;
- promise solutions to problems and concerns; or
- argue or debate.

### **Confidentiality**

The B.E.A.R. Program is based upon, and structured to ensure that the strictest level of confidentiality is maintained regarding the information shared between the business owner/manager and Volunteer Community Interviewers.

**Under no circumstances**, may any information shared during an interview be disclosed to another party (including family members) without permission of the business owner/manager. All Volunteer Community Interviewers have been asked to sign a confidentiality statement (attached).

### **Coordinator Assistance**

The Project Coordinator, (*insert Project Coordinators name*) is available at all times to assist with questions or concerns that may arise during the information gathering process. Please do not hesitate to share your suggestions, questions, or concerns with (*insert Project Coordinators name*).

### **Summary of the Interview Process**

1. Once the Project Coordinator provides details of which businesses need to be visited, make contact with each business owner/manager and arrange an appropriate meeting time and place (allocate a minimum of one and a half hours for each interview). (See Starter Conversation Tips below).
2. Before each Interview read the '*Tips for Effective Interviewing*'. (Section E. see below)
3. At the interview, include:
  - Personal introductions and some introductory comments about the B.E.A.R. Program and mention that the information will be treated in the most confidential manner (see Starter Conversation Tips below).
  - Presentation of the Business Resource Kit.
  - A check that contact details of the business are correct. Upon agreement that details are correct, the front information sheet should be detached from the survey form.
  - Completion of the survey questionnaire document - one interviewer asks the questions, the other records answers and comments.
  - Upon completion of the survey, check whether there are any other thoughts that the business manager/owner wishes to share.
  - Before leaving, an expression of appreciation to the business manager/owner for participating, a reminder that the results of the Program will be shared with each participatory business, and that they will be invited to the community feedback and celebration event.
4. Immediately following the interview, find a suitable location to:
  - Review the completed survey questionnaire to ensure everything is legible and will be understood by the person entering the results into the database.
  - Complete the '*Red Flags and Suggestions Sheet*'.
5. Return the completed survey, front information sheet and 'Red Flags and Suggestions' sheet to the Project Coordinator.

The Project Coordinator will write a letter of thanks to each participating business owner or manager.

### **Suggested Conversation Starters**

- a. **When telephoning businesses to arrange interview:**  
"*Good morning/afternoon. My name is .... (your name). Recently you would have received a letter regarding the Business Expansion and Retention (B.E.A.R.) Program from .....*

*Part of the B.E.A.R. Program involves volunteers like myself, who live locally, visiting your business to hear your opinions / ideas about operating a business in our community. We are keen to discover what you feel can be done to improve the local business environment.*

*We do this by working through the Survey that was sent to you with the letter.*

*My interview partner ..... (name of person) and I would like to arrange a visit with you in the next two weeks.*

*What would be a convenient date and time for you?*

*Good, so we will meet at your premises ... (state the address to confirm location) on (date and time)..*

*Thank you so much for your willingness to participate. We look forward to meeting you on the ... (repeat date and time)."*

**b. Upon arriving for an interview:**

*"Hi, our names are ..... and ..... As you are aware, we are Community Volunteer Interviewers with the Business Expansion and Retention Program – the B.E.A.R. Program. Many thanks for your willingness to participate in this program and share your views on running a business in our community.*

*Firstly, can we give you a copy of our Business Resource Kit, which contains information and contact details of a range of local organisations and business development programs which may be of interest to you.*

*Secondly, can I just check the details on the front information sheet of the survey are correct.*

*And now, can we go through the survey questionnaire. But, before we start, can I just emphasise that:*

- *Everything shared will be kept in the strictest confidence. Both of us as Volunteer Community Interviewers have signed a confidential agreement that no information shared today will be shared with any other party without your permission,*
- *please feel free to skip any questions you do not wish to comment on, and*
- *please feel free to expand on any of the questions.*

*Any questions?*

*Well, let's begin. I will ask the questions, and my partner ..... will record".*

**c. Before leaving the interview:**

*"Many thanks for your time. Your views and suggestions will be most helpful in terms of developing practical actions to assist our business community.*

*Can I reiterate that everything shared today will be kept in the strictest confidence, and not shared with anyone else without your permission.*

*The B.E.A.R. Program Project Coordinator will certainly keep you informed of its results and outcomes. You will be sent a summary report and an invitation to attend a community feedback and celebration meeting when recommended actions will be shared.*

*Thanks again. Goodbye".*

### **Community Volunteer Interviewer Rewards**

Besides the benefit of knowing that your involvement will help build a more vibrant business community, each Community Volunteer Interviewer will:

- receive a certificate acknowledging their participation and contribution;
- be kept informed of results and outcomes of the B.E.A.R. Program including a copy of the summary report; and
- be invited to participate in the celebration / community feedback event and any other public functions.

### **Volunteer Insurance**

The following arrangements have been made to provide insurance cover while you are engaged in the B.E.A.R. Program (*insert a summary of insurance*). For more details, please speak to the Project Coordinator.

### **Code of Practice**

The B.E.A.R. Program seeks to abide fully with the following Code of Practice for Volunteers, namely –

- *Provide Community Volunteer Interviewers with clear information on their duties and on the B.E.A.R. Visitation Program.*
- *Offer training and support for Community Volunteer Interviewers to achieve their program goals and to develop personally in the process.*
- *Reimburse Community Volunteer Interviewers for out – of – pocket expenses incurred during the performance of their duties.*
- *Recognise Community Volunteer Interviewers as valued team members and provide them with opportunities to participate in relevant Program decisions.*
- *Provide mechanisms to acknowledge the value of contributions made by Community Volunteer Interviewers.*

Equally, the B.E.A.R. Program expects Community Volunteer Interviewers to abide by the following Code of Practice for Volunteers, namely –

- *Recognize my own motives for being a Community Volunteer Interviewer and ensure they match those of the B.E.A.R. Program.*
- *Understand the purpose and philosophy of the B.E.A.R. Program before committing to it.*
- *Understand rules and guidelines of the Program.*
- *Be committed to give high quality service.*
- *Carry out all work as agreed to do, responsibly and ethically.*
- *Be willing to complete the Community Volunteer Interviewer training course.*
- *Accept support and supervision.*
- *Participate in planning and feedback about the job.*
- *Be reliable.*
- *Work as a team member.*
- *Keep all information shared in the interviews strictly confidential.*

## **D. THE SURVEY QUESTIONNAIRE**

Information gathering is the primary objective of the interview process. The Survey Questionnaire has been designed to create an interesting and valuable dialogue between the business manager/owner and the Community Volunteer Interviewers.

A copy of the survey is included within your Community Volunteer Interviewer Kit. It is based on similar questionnaires used and tested in a variety of community settings, but is also designed to reflect our local needs and characteristics.

The survey seeks information about the following themes:

### **a. Business Structure and History** *(insert question numbers here)*

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

- Business categories
- Level of local ownership
- Business structures
- Business longevity
- Product and service areas
- Perceived uniqueness and points of difference

### **b. Employment Patterns and Concerns** *(insert question numbers here)*

These questions provide:

- Perspectives regarding present and future labour market needs and expectations
- Perceptions about employee skills and attitudes
- Techniques used in recruiting employees
- Difficulties being experienced in recruiting employees.

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

### **c. Business Environment** *(insert question numbers here)*

These questions enable 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 level
- Competition levels
- Factors which would improve performance and competitiveness

### **d. Business Opportunities** *(insert question numbers here)*

These questions seek to elicit information and ideas about:

- Local matchmaking opportunities
- New business possibilities

**e. Business Plans** (*insert question numbers here*)

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 our community, and their reasons.

**f. Business Assistance Requirements** (*insert question numbers here*)

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

- Informational and educational requirements
- Technical assistance areas
- Difficulties being experienced with specific local and government agencies.

**g. E-Commerce** (*insert question numbers here*)

These questions seek information on the level of involvement in the internet, on-line ordering and communications with customers, suppliers and internal staff members.

**h. Local Issues** (*insert question numbers here*)

These questions seek the ideas and opinions from local businesses about local issues and possibilities. They also provide a final opportunity to elaborate on perceptions and ideas about what is needed to help *'local businesses do better'*.

**i. Helpfulness of the Survey** (*insert question numbers here*)

The last question seeks feedback on how useful the business owner / manager has found the questionnaire, the interview and the B.E.A.R. Program.

## **E. 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.

**F. CONFIDENTIALITY STATEMENT**

**CONFIDENTIALITY STATEMENT**

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

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

