



Building Capacity in Rural Ontario

The Enhanced BR+E Tool Kit

Ontario East Municipal Conference

September 15, 2005

Kingston, Ontario





Agenda for Today's Presentation

- Brief History of BR+E
- What is BR+E?
- The Ontario Model for BR+E
- BR+E Toolkit and Resources
- Web-based Application



Brief History of BR+E

- Piloted the Ontario Model in 1998-99
- Developed a set of resources to assist in the delivery of BR+E – Toolkit
- Provided BREI approved training courses to train 'Project Coordinators'
- Operational Review in 2003/04
- ~ 50+ completed projects to date



What is BR+E?

- An ***ongoing cooperative effort*** between business, local government, agencies, other organizations and people in the community with the ***purpose of identifying opportunities and actions to assist local businesses*** in expansion, the retention and creation of jobs and the diversification of the local economic base, as well as the ***implementation of defined actions*** to improve the local business climate.



The Ontario BR+E Model

- Based on other successful programs as well as lessons learned in the pilot programs
- Provides guidance to communities and organizations
- Includes staff support, training, funding, and the BR+E Toolkit
- Ongoing monitoring and evaluation to meet changing client needs



The BR+E Toolkit

- Resources to help communities direct their own BR+E program
- Rural Development Division staff assist communities
- Specific RED funding for BR+E projects



The BR+E Toolkit

What's New?

- Improvements to the BR+E Tools
 - *An updated BR+E survey instrument*
 - *The new web-based application for data management and analysis*



The NEW Web Based Application

- What is it?
- Who is Eligible?
- Key Features and Benefits
- User Roles
- Business Process



What Is It?

- A powerful technology-based tool
- Developed based on stakeholder input
- Intended to assist the user in:
 - managing business survey data
 - generating reports
 - comparing project results
 - facilitating the development of strategic actions to support local businesses and improve the local business climate



Eligible Communities

- Available as a tool/service to our rural clients at no cost
- Those clients not considered rural are also eligible, however they would need to negotiate a separate licence fee/agreement with Executive Pulse



Key Features and Benefits

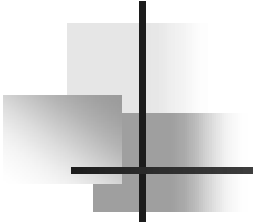
- General Features:
 - Survey available in three formats: on-line, off-line and in a downloadable version
 - Application is available in English and will also be available in French
 - Safe and secure data hosting; centralized data repository

Web Based Application – User Friendly

The screenshot shows a web browser window with the following elements:

- Browser Title Bar:** ExecutivePulse - Business Intelligence System - Microsoft Internet Explorer provided by Rogers Hi-Speed Internet
- Navigation:** << HOME
- Header:** A dark bar containing the logo "B R + E" on the left and a white ECG-style pulse line on the right.
- Left Sidebar:** A vertical menu with expandable items:
 - + User Tools
 - + Ad Hoc Queries
 - + Market Reports
 - + Utilities
 - + Administrative Tools
- Main Content Area:** Features the Ontario logo (a stylized trillium flower) and the text "Ontario". Below this, it says "Welcome Karen Fischer".
- Footer:** A dark bar with navigation links: "ExecutivePulse: Home | Tutorial | Technical Support | Logout" on the left and "About ExecutivePulse" on the right.
- Page Controls:** A "BACK" button with a left arrow and a "TOP OF PAGE" button with an up arrow.
- Copyright:** ©2003-2005 ExecutivePulse, Inc. All rights reserved.





Key Features and Benefits

- 24/7 Technical Support
- Easy to follow self-directed tutorial
- Different levels of user access
- Project profile creation
- Ability to create project(s) on an individual or multiple CD or CSD level

Self Directed Tutorial

BR+E

CD Administrator - Self-Directed Tutorial

Using User Tools - Project Portfolio

Search for a specific BR+E Project

Step One: *Open the specific Project Portfolio.*

1. Select PROJECT PORTFOLIO under USER TOOLS on the MAIN MENU.
2. Enter the project name, OR search by entering a few beginning letters of the project name OR leave the field blank
3. Select the CONTINUE button.
4. Select and highlight the correct project from the list of project names in the drop down list.
5. Select CONTINUE.

Note: This will open the PROJECT PORTFOLIO that you've selected. Note that the PROJECT PORTFOLIO is divided into two sections: Project Profile and Project Information.

Step Two: *Select from one of the following functions*

1. View Project Coordinator information
2. Edit a Selected Project
3. View the Companies in the Selected Project
4. Add a Company to the Selected Project
5. View Company Portfolio



Features and Benefits – Several Levels of User Roles

- Several levels of user rights have been created for the web based application to correspond with the (potential) various users in a BR+E project
- These include Provincial Administrator, CD/CSD Administrator, Interviewer Staff/Interviewer Volunteer, and Referral Partner

User Roles

User Role

- CD Administrator: All functions related to managing a specific project including: edit projects; add companies and users to a project. Ability to run *Ad Hoc Queries*, *Market Reports*, and all *Administrative Tools*.
- CSD Administrator: All functions related to managing a specific project including: edit projects; add companies and users to a project. Ability to run *Ad Hoc Queries*, *Market Reports*, and all *Administrative Tools*.
- Interviewer Staff: All functions related to outreach including: add a company to a project; view personal *User Portfolio*. Ability to run *Ad Hoc Queries* and *Market Reports*.
- Interviewer Volunteer: All functions related to outreach including: add a company to a project; view personal *User Portfolio*.
- Referral Partner: Ability to receive/review/respond to Referrals through personal *User Portfolio*.

Access Rights

CD/CSDs:

Demo CD - Demo CSD 1
Demo CD - Demo CSD 2
Demo CD - Demo CSD 3

(use *shift* + *click* to select all CD/CSDs between the two selections)
(use *ctrl* + *click* for multiple selections)

Save

Reset

 BACK

 Ontario

TOP OF PAGE 

 Ontario

Project Profile Creation

- [-] **User Tools**
 - Project Portfolio
 - User Portfolio
- [+] **Ad Hoc Queries**
- [+] **Market Reports**
- [+] **Utilities**
- [+] **Administrative Tools**

CD Administrator - Edit An Existing Project

Please enter the following information:

Project Name: PerthDemo

Project Duration: 1/1/2005 to 12/31/2005

Project CD/CSDs: Demo CD - Demo CSD 1
Demo CD - Demo CSD 2
Demo CD - Demo CSD 3

Project Coordinator: Demo CAdmin (DemoAdmin)

Other Administrators:
(use *shift* + *click* to select all users between the two selections)
(use *ctrl* + *click* for multiple selections)

Interviewers:
(use *shift* + *click* to select all users between the two selections)
(use *ctrl* + *click* for multiple selections)

Referral Partners:
(use *shift* + *click* to select all users between the two selections)
(use *ctrl* + *click* for multiple selections)



Features and Benefits Cont'd

- 'Smart' Survey data entry feature
- Word search feature for 'Comments' fields in survey
- Specific Sector Questions (6)
- Ability to create up to 15 Community Questions
- Ability to record businesses in 2, 3, or 4 digit NAICS Classification

Web Based Application – Adding a Visit

- User Tools**
- Ad Hoc Queries**
- Market Reports**
- Utilities**
- Administrative Tools**
 - User Management
 - Usage Statistics
 - [View User Activity](#)
 - View User Referrals
 - Referral Reports
 - Productivity Reports
 - Record Management

CD/CSD Administrator - Add A New Visit

Quick Links to Survey Sections

Business Climate	Business Dev.	Company Info.
Company Profile	Financial Dev.	Future Plans
Local Community	Markets Dev.	Workforce Dev.

- Required

Business Sector:

[Company Profile](#)

[Visit Information](#)

[Business Climate](#)

[Future Plans](#)

[Company Information](#)

[Business Development](#)

[Business Development - Markets](#)

Web Based Application – Survey Instrument

Business Climate ⊕

BC1. What is your general impression of this community as a place in which to do business?

Excellent
 Good
 Fair
 Poor

BC2a. In the past 3 years has your attitude about doing business in this community changed?

Yes
 No

BC2b. If yes, is your attitude now more positive?

Yes
 No

BC2c. Explain your positive change in attitude:

None

BC2d. Explain your negative change in attitude:

None

BC3. What is your general impression of the Province of Ontario as a place in which to do business?

Excellent
 Good
 Fair
 Poor

Please explain:

None

Sector Specific Questions

Manufacturing

MF1. What are your **A) current and B) projected** plans regarding the plant operation?

A = Current
B = Projected in 3 years

Operation Plan

	A	B
Maintain the current size and type	<input type="radio"/>	<input type="radio"/>
Expand the size of the plant	<input type="radio"/>	<input type="radio"/>
Maintain current size	<input type="radio"/>	<input type="radio"/>
Downsize	<input type="radio"/>	<input type="radio"/>
Exit the industry	<input type="radio"/>	<input type="radio"/>

MF2a. Do you compete for business against "sister" plants within your corporate organization?

- Yes
 No

MF2b. Are these "sister" plant(s) ...

- Newer
 Larger
 More efficient
 About the same/little difference
 In Ontario
 In Canada
 Outside of Canada

MF3. Where is your **A) primary and B) secondary** product in its life cycle?

A = Primary
B = Secondary

Life Cycle

	A	B
Emerging	<input type="radio"/>	<input type="radio"/>
Growing	<input type="radio"/>	<input type="radio"/>
Maturing	<input type="radio"/>	<input type="radio"/>
Declining	<input type="radio"/>	<input type="radio"/>

MF4a. What percentage of your products' components are "outsourced" from another manufacturer?

- 0 - 10%
 11 - 25%
 26 - 49%
 50%+



Features and Benefits Cont'd

- Ability to create both pre-defined and user defined 'ad hoc' queries and reports
- Ability to generate a variety of reports in a high and low definition graphical format

Market Reports

- + **User Tools**
- + **Ad Hoc Queries**
- **Market Reports**
 - Project Analysis
 - Project Rollup
- + **Utilities**
- + **Administrative Tools**

CD Administrator - Project Analysis

Please select the report section you wish to generate:

+ Risk of Closure, Downsizing or Relocation ('red flags');

Reports in this section include the following

- *Future site plans (next 3 years)*
- *Downsizing result in reduced workforce*
- *Plan to relocate business (next 3 years)*
- *Area of possible business relocation*
- *Reasons for possible relocation*
- *Assistance to prevent relocation*
- *Plan to close business (next 3 years)*
- *Reasons for possible close*
- *Assistance to prevent closing*

+ Information/Assistance:

+ Business Climate & Community Assessment:

+ Site Satisfaction:

+ Buyer/Supplier Opportunities:

+ Business Expansion & Sales Trends:

+ Workforce:

+ Barriers/difficulties to business development:

(To view the reports within each section please click on the plus image)

NOTE: PROCESSING TIME FOR THIS REPORT MAY EXCEED WHAT YOU NORMALLY EXPERIENCE. PLEASE BE PATIENT. ONLY CLICK THE SUBMIT BUTTON ONCE.

Market Reports

+ User Tools

+ Ad Hoc Queries

- Market Reports

Project Analysis

Project Rollup

+ Utilities

+ Administrative Tools

CD Administrator - Project Rollup



HD GRAPHICAL

LD GRAPHICAL

PRINTABLE

Risk of Closure, Downsizing or Relocation ('red flags')

(FP1) Within the next three years, which of the following do you plan to undertake at this site

PerthDemo¹

Remain the same	7	35%
Downsize	3	15%
Relocate	5	25%
Expand	8	40%
Close	1	5%

¹Note: 20 total companies responded for PerthDemo

(FP2) Will the downsizing result in a reduced workforce

PerthDemo

Yes	3	100%
No	0	0%

Total count 3 100%

(FP3) Do you plan to relocate this business within the next three years

PerthDemo

Yes	2	67%
No	0	0%
Exploring	1	33%

Total count 3 100%

(FP4) Where do you plan to relocate this business

PerthDemo

Within the municipality	2	100%
Outside the municipality	0	0%
Elsewhere in Ontario	0	0%

High Density Graph

Risk of Closure, Downsizing or Relocation ('red flags')

(FP1) Within the next three years, which of the following do you plan to undertake at this site	Count	Percent
Remain the same	7	35%
Downsize	3	15%
Relocate	5	25%
Expand	8	40%
Close	1	5%

(FP2) Will the downsizing result in a reduced workforce	Count	Percent
Yes	3	100%
No	0	0%

(FP3) Do you plan to relocate this business within the next three years	Count	Percent
Yes	2	67%
No	0	0%
Exploring	1	33%

Low Density Graph


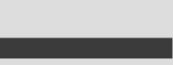
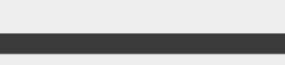


Project Analysis

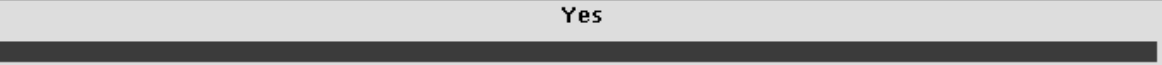
Report Generated on 7/25/2005

Table Key:

 PerthDemo

Risk of Closure, Downsizing or Relocation ('red flags')

(FP1) Within the next three years, which of the following do you plan to undertake at this site	Count	Percent
 Remain the same	7	35%
 Downsize	3	15%
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(FP2) Will the downsizing result in a reduced workforce	Count	Percent
 Yes	3	100%
No	0	0%

Ad Hoc Queries

- + **User Tools**
- **Ad Hoc Queries**
 - Search Database Records
 - Search Notes Fields
- + **Market Reports**
- + **Utilities**
- + **Administrative Tools**

CD Administrator - Search Database Records

Quick Links to Survey Sections

- | | |
|---------------------------------------|---------------------------------------|
| Company Profile | Visit Information |
| Business Climate | Future Plans |
| Company Information | Business Development |
| Market Development | Financial Development |
| Workforce Development | Local Community |

(Click on section name to jump to section)

Saved Queries

Select One

Business Sector: Select All

- Sort by - Display field

- Company Profile

- CP1. Company Name:
- CP2. Company Address:
- ON

Ad Hoc Queries

Company Profile

- CP1. Company Name:
- CP2. Company Address:
 ON
- CP3. CD:
- CP4. CSD:
- CP5. Business Sector:
- CP6. Telephone Number:
- CP7. Fax Number:
- CP8. Contact Person:

Visit Information

- VI1. Interview date:
- VI2. Interview number:
- VI3. User inputting the data:
- If you're not the interviewer, who was:
- VI4. Name of person interviewed:
- VI5. Do you give permission for the above information to be used in the creation of a

Ad Hoc Queries

CD Administrator - Search Database Records

- + **User Tools**
- **Ad Hoc Queries**
 - Search Database Records
 - Search Notes Fields
- + **Market Reports**
- + **Utilities**
- + **Administrative Tools**



[Export Search Results to Microsoft Excel®](#)

Project Name: **PerthDemo**
Business Sector: **Cross-Sectoral**

There are **28** out of **28** companies that have met your search criteria, equaling **100.00%**.

[🔍 Bleams Farms Inc.](#) Interview number: 2 Date of meeting: 5/26/2005 [⊕](#)

Company Profile

CSD: Demo CSD 1

Business Climate

General impression of comm.: Fair

Attitude change doing bus. (past 3 yrs.): Yes

[BACK](#)

[🔍 Brock Farms Inc.](#) Interview number: 2 Date of meeting: 5/26/2005 [⊕](#)

Company Profile

CSD: Demo CSD 2

Business Climate

General impression of comm.: Good

Attitude change doing bus. (past 3 yrs.): Yes



Features and Benefits Cont'd

- Ability to export data into an Excel spreadsheet for further analysis (data dump)
- Ability to export company information data into excel file for the creation of a Business Directory (also import from previously populated business directory into company information section where compatible)
- Ability to perform year over year and project to project comparisons



Features and Benefits Cont'd

- Ability to roll-up BR+E project data into a Provincial database without company identifiers; ability to roll up data regionally as well
- This will assist our staff in defining and validating trends, opportunities, weaknesses and threats both regionally and provincially



Setting Up a Project

- Contact Provincial Administrator (PA)
- Project Partners will be asked to sign an Agreement
- Once the Agreement has been signed, PA will provide access to the designated coordinator to the application.
- Once access has been provided – at this point the project belongs to the community



What's Next?

- MAH regional staff are available to provide support to Projects
- Nineteen communities signed up since June 1
- French / laptop version available by early fall
- BR+E Toolkit and resources to be made available on-line through REDDI



For Further Information

For further information or a more detailed presentation please contact your MAH Regional Team and/or myself...

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