

## **B.C. INDIGENOUS AGRICULTURE DEVELOPMENT PROGRAM: PROGRAM GUIDE FOR INDIGENOUS ENTREPRENEURS**

*Updated May 2021*

This Program Guide provides Applicants and Qualified Business Consultants an overview of eligible activities, minimum deliverables, and other guidelines and requirements for projects funded through the B.C. Indigenous Agriculture Development Program for Indigenous Entrepreneurs. **All program documents, including application forms, a fillable Word document version of the business planning and management coaching session record sheet, and a list of Qualified Business Consultants, are available for download on the [B.C. Indigenous Agriculture Development Program webpage](#).**

**This Program Guide includes:**

<b>1. Program Overview .....</b>	<b>1</b>
<b>2. Supplemental Guidelines for Qualified Business Consultants.....</b>	<b>8</b>
<b>Appendix A: Final Report Outlines .....</b>	<b>11</b>
<b>Appendix B: Business Planning and Management Coaching Session Record Sheet .....</b>	<b>12</b>
<b>Appendix C: Basic Business Plan Outline .....</b>	<b>13</b>
<b>Appendix D: Business Planning and Management Coaching Topic Examples .....</b>	<b>15</b>

## **1. PROGRAM OVERVIEW**

### **1.1) What is the Indigenous Agriculture Development Program?**

The B.C. Indigenous Agriculture Development Program supports Indigenous peoples' success in the food and agriculture sector. The **program stream for Indigenous entrepreneurs** supports applicants to receive services from a Qualified Business Consultant for Business Plan Coaching and Development (Step 1 of the Program) and Specialized Business Planning and Management (Step 2). Step 1 focuses on developing a basic business plan and Step 2 builds on that foundation through specialized business planning services and skills development coaching.

### **1.2) Who Can Apply? Program Eligibility**

This stream of the Indigenous Agriculture Development Program is open to any Indigenous entrepreneur, defined as independent business owners, including sole proprietors and limited companies and partnerships owned by, or where the majority of shares are held by, an individual or family members, that are a resident of the Province of British Columbia. Your business must be related to primary food production through agriculture or harvesting (e.g. non-timber forest products) and/or food and beverage processing.

Applicants to Specialized Business Planning and Management (Step 2) must have completed Business Plan Coaching and Development (Step 1) or an equivalent business planning process (i.e. have a basic, written business plan in place). We highly recommend participating in Step 1 of the program before applying to Step 2; however, applications will be considered under some special circumstances on a case-by-case basis.

Additionally, if you have received funding between 2018 and 2023 through the B.C. Agri-Business Planning Program, apart from funding through the Disaster Recovery Stream, you are not eligible. Please contact Indigenous

Agriculture Development Program staff ([Agribusiness@gov.bc.ca](mailto:Agribusiness@gov.bc.ca) or 1-888-221-7141) if you have any questions or would like to discuss your eligibility for the program.

### **1.3) What do You Need to Know About the Application Process?**

#### **When are applications accepted?**

When the program is open, applications are accepted and reviewed on an ongoing basis. The application intake period for the program may vary annually and will be indicated on the [program webpage](#). Funding for the program is allocated on an annual basis per fiscal year. When the program's annual funding is fully allocated, the program will be closed for applications until the following fiscal year and the opening of the next application cycle. Applications received in one fiscal year **will not be** carried over into the following year. The submission of a second application in the same fiscal year does not oblige the Ministry to approve that application, as new applicants will be given priority. All applications are reviewed based on their eligibility and merit.

#### **Who should submit the completed application?**

The Applicant must submit the completed application in Word file format to [Agribusiness@gov.bc.ca](mailto:Agribusiness@gov.bc.ca), copied (CC'ed) to the Consultant. Hardcopy application submissions are not accepted.

#### **How long will it take to review my application?**

We review and assess completed applications as quickly as possible after they are received. We aim to provide you with a decision on your application within three weeks of submission.

#### **How much funding is each Applicant eligible for?**

Each Applicant, through the Indigenous entrepreneur stream, is eligible to receive a total of up to \$8,000 in funding through the Indigenous Agriculture Development Program during the funding cycle of the Canadian Agricultural Partnership (2018-2023). The maximum funding available for a Business Plan Coaching and Development Project (Step 1) is \$3,000 and the maximum funding available for a Specialized Business Planning and Management Project (Step 2) is \$5,000.

However, if you have received funding between 2018 and 2023 through the B.C. Agri-Business Planning Program, apart from funding through the Disaster Recovery Stream, you are not eligible for funding through the B.C. Indigenous Agriculture Development Program.

#### **Can I apply for a Business Plan Coaching and Development Project (Step 1) and Specialized Business Planning and Management Project (Step 2) at the same time?**

The program steps are designed to be completed sequentially and build upon one another. Specialized Business Planning and Management Project (Step 2) applications will only be accepted after Business Plan Coaching and Development (Step 1) projects are completed or the Applicant provides strong justification for applying directly to Step 2 based on having completed a business planning process equivalent to Step 1 (i.e. the Applicant already has a basic, written business plan in place). Under these special circumstances, applications will be considered on a case-by-case basis.

### **What happens after my application is approved**

1. The project is completed as per the project proposal timelines (maximum of 90- to 150-days in total) set out in the application.
2. The Qualified Business Consultant submits a Final Report to you, the Applicant, with sufficient time for you to review the report before the project completion date., as outlined in your authorization letter You, the Applicant, approve the Final Report and sign the Claim Form. The Qualified Business Consultant submits an invoice, approved Claim Form and Final Report by e-mail to the B.C. Ministry of Agriculture, Food and Fisheries.
3. B.C. Ministry of Agriculture, Food and Fisheries reviews the submission package and pays Qualified Business Consultant directly.
4. Consultant and Applicant complete a short on-line survey.

### **1.4) How can You use the Funding? Eligible Activities and Minimum Deliverables**

This two-step program is designed to support you in building your business management skills and knowledge through a coaching approach, with access to professional business and financial planning services from a Qualified Business Consultant in the food and agriculture sector. Every entrepreneur's specific needs will be different. For some, the greatest benefit may come through business planning and management coaching, while for others, there may be a greater need for specialized business and financial planning services. Depending on an individual applicant's needs and preferences, how much project time is dedicated to coaching, business plan development or specialized business planning and management services will vary from project to project.

Because of these individual differences, it is important for you to work directly with your Qualified Business Consultant to identify your business planning and management priorities and design a project to meet your goals. You begin this through the application process and, once the project is approved, work together to implement your project. At the end of the project, the Qualified Business Consultant will produce a Final Report to summarize project activities, findings and analysis, and providing recommendations for next steps. Review the **appendices at the end of this guide** for more detail on coaching sessions and business planning and management coaching topics.

Eligible activities and minimum deliverables must be used to guide the development of project proposals in the program application, and are distinct for Business Plan Coaching and Development (Step 1) and Specialized Business Planning and Management (Step 2) Projects.

#### **1.4 A) Business Plan Coaching and Development (Step 1)**

**This step of the Indigenous Agriculture Development Program provides:**

- Up to \$3,000 of business development and coaching services from a Qualified Business Consultant to develop a business plan and/or enhance your existing business plan.

**What activities are eligible as part of Business Plan Coaching and Development?**

Eligible activities include:

- Business plan coaching services (typically 5-7 sessions).
- Business plan development services.

(Note that the following activities are *ineligible*: legal, accounting and other costs associated with implementing the plan; legal agreements between any stakeholders or separate businesses; tax preparation; acquiring capital assets; and, buying, starting or expanding a farm or business.)

**A Business Plan Coaching and Development Project will result in the following minimum deliverables, as agreed upon in the project proposal:**

- Basic business plan and/or completed Business Plan outline (see Appendix C);
- Record of coaching sessions (using the Business Planning and Management Coaching Session Record Sheet, 1 per session, see Appendix B); and
- Recommendations for next steps.

#### **1.4 B) Specialized Business Planning and Management (Step 2)**

**This step of the Indigenous Agriculture Development Program provides:**

- Up to \$5,000 of specialized business planning and coaching services from a Qualified Business Consultant(s) to undertake financial analysis and specialized business planning and/or strengthen your business management knowledge and skills.

**What activities are eligible as part of a Specialized Business Planning and Management Project?**

Building on the needs and next steps identified in Step 1, Step 2 projects will combine business development, management coaching and specialized business planning services to support business development.

**Eligible activities include:**

- Coaching on areas of business planning and management, such as:
  - Any of the specialized business areas identified below and any other core business planning areas (e.g. assessing current and future financial needs, business vision and mission creation, production planning, human resource planning, etc.); measuring success and setting SMART goals; presenting a business plan to a financial organization or lender; other priority areas for business planning, management knowledge and skill development identified and agreed upon by the Applicant and Qualified Business Consultant.
- Specialized Business, Management and Financial Services, such as:
  - Business strategy development; business structure analysis; production economics; financial analysis; marketing strategy; value-added ventures; risk assessment and mitigation; and, skills and knowledge development in business management or production and processing to meet identified needs.

(Note that the following activities are *ineligible*: legal, accounting and other costs associated with implementing the plan; legal agreements between any stakeholders or separate businesses; tax preparation; acquiring capital assets; and, buying, starting or expanding a farm or business.)

**A Specialized Business Planning and Management Project will result in the following minimum deliverables, as agreed upon in the project proposal and commensurate with the project budget:**

- Agreed upon number of business planning and management coaching sessions;
- Final report

Final reports must be a minimum of 1,500 words and meet a high professional standard. They must reflect thorough, accurate research and analysis, be free of grammatical and typographical errors and have consistent formatting.

Final Report must include:

- Executive summary that describes:

- High priority business planning and management areas prioritized in the project.
- How the applicant was involved in the development and updating of their business plan.
- Applicant's action plan for addressing low or medium business planning and/or management priorities, not addressed in this project (if applicable).
- Coaching session record sheets.
- Copy of Applicant's Final Business Plan including supporting documentation (where applicable).
- For documents where calculations were performed - attach supporting excel file/overview of calculations.
- Other final reporting documents (including invoice and signed claims form).

## **1.5) What Else do I Need to Know?**

### **How do I choose a Consultant?**

A list of Qualified Business Consultants is available on the B.C. Indigenous Agriculture Development Program webpage. The listing provides information on each Consultant's areas of expertise and geographic location. If you are unsure of which Consultant may be a good fit for your needs, Indigenous Agriculture Development Program staff may be able to assist you in creating a shortlist of individuals with the skillset you are seeking. You can reach out directly to the Consultant regarding your project.

If you have a pre-existing working relationship with a business consultant with whom you would prefer to work on your project, but who is not part of the Qualified Business Consultant list, please contact Program Staff to discuss possible options ([Agribusiness@gov.bc.ca](mailto:Agribusiness@gov.bc.ca) or 1-888-221-7141).

### **Do I need to work with the same consultant for Business Plan Coaching and Development (Step 1) and Specialized Business Planning and Management (Step 2) projects?**

It is not required for you to work with the same consultant during Step 1 and Step 2 of the program. However, given that you will have invested time during Step 1 to become familiar with each other and brief the consultant on your business, there are advantages to continuing to develop that working relationship through your Step 2 project. Keep in mind that a supporting consultant may also be asked to contribute to your project with their area of expertise and specialization.

### **Who can I talk to if I have questions or would like additional support?**

At any time during your application, project development and implementation, Applicants and Qualified Business Consultants are encouraged to contact Indigenous Agriculture Development Program Staff ([Agribusiness@gov.bc.ca](mailto:Agribusiness@gov.bc.ca) or 1-888-221-7141) to discuss any concerns or questions that may arise. Program Staff may also contact you during the implementation of your project to check-in and discuss your progress.

### **How long is the project? Project timelines**

Projects can take place over a period of 90- to 150-days. In your application, you can indicate your project start date and how long you need to complete your project, approve the Final Report and submit the signed Claim Form and invoice. Your end date can be up to 150 days from your start date and will be indicated on your Approval letter. Note that a minimum of 90-days is usually required to complete the project.

Project extensions are sometimes granted under extenuating circumstances. You should contact the Program Manager a minimum of two weeks before the project end date if concerns arise with respect to completing the project within the approved timeframe. Please note, no extensions can be granted past the last day of February of any year.

Reports will be reviewed by Ministry Staff for their thoroughness, accuracy and responsiveness to agreed upon deliverables and project plans set out in the Project Proposal section of your application.

### **Why do we ask for a Business Planning and Management Coaching Session Record Sheet to be completed for each session?**

A Business Planning and Management Coaching Session Record Sheet summarizing the goals, discussion and next steps must be completed for each coaching session. A PDF of the Coaching Session Record Sheet is provided in Appendix B and a fillable Word version is available for download from the program webpage. Creating this valuable record will:

- Help you build toward your project objectives from session to session by summarizing key information and identifying next steps;
- Allow you to refer back to the information covered during the session in the future (both during and after the completion of your project); and,
- Become part of the Final Report (see Appendix A), so that more of your consultant's time can be spent working with you to meet your project objectives.

### **What is the Final Report?**

The Final Report is a useful document capturing the work conducted during the project. Appendix A provides a Final Report Outline for Business Plan Coaching and Development (Step 1) and Specialized Business Planning and Management (Step 2) Projects. While Final Reports will vary to some degree to account for the individual characteristics of each project, they will include an executive summary and project overview, all minimum deliverables for the project as agreed upon in the project proposal (e.g. record of coaching sessions using the record sheet template provided in Appendix B; report of findings and recommendations linked with specialized business planning services, etc.), and a list of recommendations resulting from the project. All reports will be of professional quality and reflect thorough, accurate information, research and analysis, be free of grammatical and typographical errors and have consistent formatting.

The Final Report must include:

- Executive summary that describes:
  - High priority business planning and management areas prioritized in the project.
  - How the applicant was involved in the development and updating of their business plan.
  - Applicant's action plan for addressing low or medium business planning and/or management priorities, not addressed in this project (if applicable).
- Coaching session record sheets.
- Copy of Applicant's Final Business Plan including supporting documentation (where applicable).
- For documents where calculations were performed - attach supporting excel file/overview of calculations.
- Other final reporting documents (including invoice and signed claims form).

### **How do I provide feedback on the Final Report?**

- In order to provide you with adequate time to review the Final Report and for the Qualified Business Consultant to incorporate your feedback, the Qualified Business Consultant will provide you with a minimum of two weeks to review the Final Report before the end of the project. If you have comments or would like to request revisions to the Final Report to better meet the agreed upon project objectives, please provide your feedback to the Qualified Business Consultant as soon as possible. They should incorporate reasonable feedback and changes you request in order to align the report with your mutually agreed upon project objectives.

When you approve the report, please sign the Claim Form that the Qualified Business Consultant will provide you. This indicates that you are satisfied with the work completed as part of the project. The Qualified Business Consultant will then submit a copy of the Final Report, the signed Claim Form and their invoice to the B.C. Ministry of Agriculture, Food and Fisheries.

**What if I have questions or concerns with my experience with the program and/or the quality of my project?**

If you have any questions or concerns regarding the business planning services and coaching and/or the quality of your project, do not hesitate to contact program staff at [agribusiness@gov.bc.ca](mailto:agribusiness@gov.bc.ca) or 1-888-221-7141.

**What happens if the proposed budget for my project exceeds the funding limit?**

The maximum funding amount from the Ministry is disclosed in your authorization letter. If the proposed project budget exceeds the approved funding limit, the applicant is responsible for paying the difference to the consultant.

- Sometimes additional time/additional resources may be required for a complicated project.
- If a proposed budget (\$7,500) for a Specialized Business Planning and Management Project (Step 2) exceeds the Ministry's maximum allowable funding (\$5,000); and
- If this proposed budget is mutually agreed upon by the applicant and consultant on the application form (before the project starts)
- Then the applicant is responsible for paying the consultant for all the amount over and above (\$2,500) the approved amount (\$5,000) in their authorization letter.

## **2. SUPPLEMENTAL GUIDELINES FOR QUALIFIED BUSINESS CONSULTANTS**

### **2.1) Guidelines for Project Proposal Preparation and Application Submission**

It is recommended that the project proposal and budget be created collaboratively by the Applicant and Consultant to ensure mutually understood project objectives and plans.

Other considerations when preparing your project proposal:

- Projects must be undertaken in accordance with the current COVID-19 public health and workplace safety guidelines and recommendations issued by the Provincial Health Officer and the Province. This may require additional adaptability and creativity. Please do not hesitate to contact Program Staff if you would like to discuss your project planning and implementation options.
- Applications, and the Project Proposals they contain, must be **submitted by the Applicant via e-mail to [Agribusiness@gov.bc.ca](mailto:Agribusiness@gov.bc.ca)**.
- No work on a project in a proposal started prior to receiving approval from the B.C. Ministry of Agriculture, Food and Fisheries will be eligible for support under this program.
- For work in remote locations, travel costs may be included in the Project Proposal, but must be reasonable, not exceed 20% of the total project budget, and will be reviewed by the Ministry. No travel outside of B.C. will be reimbursed.
- No project end dates or project extensions can be granted past the last day of February of any year.
- Completion and submission of an application form does not oblige the Ministry, its agents or employees to provide funding for the services herein;

### **2.2) Guidelines for Using a Supporting Consultant**

We are committed to ensuring high quality services are provided to Program Applicants. As such, the Program Manager and Applicant need to understand who is working on the project. Qualified Business Consultants must be transparent about who is responsible for completing which aspects of the project. In some cases, it may be necessary for the Qualified Business Consultant (the 'Primary Consultant': i.e. the Consultant hired by the Applicant and responsible for the project) to sub-contract a 'Supporting Consultant' with specialized expertise required to complete a project activity. If both Consultants are approved by the Ministry as Qualified Business Consultants (i.e. both have applied and been approved through the Ministry's Request for Standing Offer Bidding process), the Primary Consultant must indicate on the application form that the Supporting Consultant will be hired and for which activities.

If the Supporting Consultant, however, is not a Qualified Business Consultant for the B.C. Indigenous Agriculture Development Program, the Supporting Consultant must be vetted by the B.C. Indigenous Agriculture Development Program if they are contributing more than 10% of the work needed to complete the approved project (as defined by a percentage of the budget). If a Primary Consultant would like to hire a Supporting Consultant who is not on the Ministry's Qualified Business Consultant list to work above the 10% threshold, they must provide a rationale in the application form and (**NEW**) include a copy of their resume with the application package.

If the need for a Supporting Consultant arises later, complete and submit a Supporting Consultant Request Form, including the Supporting Consultant's credentials and a rationale for their inclusion on the project. If you require the form, please e-mail [Agribusiness@gov.bc.ca](mailto:Agribusiness@gov.bc.ca). A Supporting Consultant who is not a Qualified Business Consultant will not be approved to complete more than 40% (as defined by a percentage of the budget) of the work for an Indigenous

Agriculture Development Program Project.

Please note, payments will only be made to the Primary Consultant.

### 2.3) Timelines and Review

Final project documents, including the Applicant's updated Business Plan, invoice and signed claims form, must be submitted by the Qualified Business Consultant to the B.C. Ministry of Agriculture, Food and Fisheries within 90 days of the approved project start date (and never later than the last day of February of any year).

To provide the Applicant with adequate time to review and request any needed modifications or revisions by the Qualified Business Consultant to meet the agreed upon project objectives, **the Final Report must be submitted by the Qualified Business Consultant to the Applicant** (or the Primary Contact for the Applicant) for review and feedback a **minimum of two weeks prior to the project end date**. Should reasonable revisions be requested, it is the responsibility of the Qualified Business Consultant to complete the revisions and get approval from the Applicant prior to submitting the Final Report, invoice and signed claims form to the Ministry at the end of the project. , as outlined in the Authorization Letter

Project extensions are sometimes granted under extenuating circumstances. The Qualified Business Consultant should contact the Program Manager a minimum of two weeks before the project end date if concerns arise with respect to completing the project within the 90-day timeframe. Please note, no extensions can be granted past the last day of February of any year.

Reports will be reviewed by Ministry Staff for their thoroughness, accuracy and responsiveness to be agreed upon deliverables and project plans set out in the project proposal (also see Adherence to Professional Standards below).

### 2.4) Professional Standards and Reporting Requirements

The Ministry reserves the right to remove a Qualified Business Consultant from the Qualified Consultant List if, in the sole opinion of the Ministry, the Qualified Business Consultant does not meet the quality standards of the B.C. Indigenous Agriculture Development Program.

A Final Report Outline (Appendix A) and a Business Planning and Management Coaching Session Record Sheet (Appendix B) are provided for the Indigenous Entrepreneur Stream of the B.C. Indigenous Agriculture Development Program. The intention is to enable thorough and streamlined Final Reporting that will allow as much of the project budget as possible to be directed towards project implementation. Applicants have the opportunity to review and provide feedback on the Final Report. They must be given the Final Report a minimum of two weeks prior to the project end date in order to have adequate time to review the document. They may request reasonable revisions to better meet agreed upon project objectives and minimum deliverables. The Applicant will sign the Claim Form to indicate they approve the Final Report.

All Final Reports will be reviewed by Ministry Staff for their thoroughness, accuracy and responsiveness to agreed upon deliverables and project plans set out in the project proposal in the application. Failure to meet program quality standards may include submitting a Final Report that:

- 1) Fails to include mandatory minimum deliverables or project components described in the project proposal;
- 2) Significantly deviates from the project proposal with respect to scope, expected outcomes or budget, and for which a project revision was not requested and approved;
- 3) Contains errors, omissions or misrepresentations, which, in the sole opinion of the Ministry, are of a serious nature;

- 4) Does not meet an acceptable professional standard of presentation, which includes significant grammatical or typographical errors, failure to include references or works cited, and reports significantly below the minimum length requirement (reports under 1,500 words in length for Step 1 projects and 2,000 words in length for Step 2 projects cannot adequately meet the Minimum Deliverables and program standards).

A quality concern may also relate to the comportment or professionalism of a Qualified Business Consultant, or other oversight or issue deemed significant by the Applicant or by Ministry of Agriculture, Food and Fisheries Staff during project review.

If the Province withdraws the name of a Qualified Supplier from the List of Qualified Suppliers, the Province will notify that Qualified Supplier via written letter or email outlining reasons for the withdrawal.

A Qualified Supplier may also withdraw their name from the List on written notice to the Province.

## **2.5) Conflict of Interest**

Any current or past work of the Qualified Business Consultant for the Program Applicant must be disclosed to the Ministry on the application. Any conflict of interest must also be disclosed by the Qualified Business Consultant to the Ministry on the application. A conflict of interest is defined as a situation where a Qualified Business Consultant's private affairs or financial interests are in conflict, or could result in the perception of conflict, with their services to the Applicant under the program. Where a conflict of interest, or the perception thereof, exists, the Qualified Business Consultant's actions or conduct could undermine or compromise the Applicant's confidence in the Qualified Business Consultant's ability to discharge their services.

## **APPENDIX A: FINAL REPORT OUTLINES**

Final Reports for both steps of the B.C. Indigenous Agriculture Development Program for Indigenous Entrepreneurs should follow the parameters set out below. The order and format may be adapted as needed to best meet individual project goals.

### **Business Plan Coaching and Development (Step 1) Final Report Outline**

- 1) Executive Summary
  - Short (e.g. 1 page) overview of the project goals, agreed upon deliverables and work completed
- 2) Business Plan Coaching Record Sheets
  - 1 per coaching session: see Appendix B
- 3) Basic Business Plan (or completed Business Plan Outline, Appendix C)
  - See Appendix C for a Basic Business Plan Outline
- 4) Discussion and Recommendations for Next Steps
  - 1-2 page discussion of next steps and recommendations to further the Program Applicant's business planning and management goals.
  - Recommendations for next steps can include areas of business planning and management that might be further developed through a Specialized Business Planning and Management (Step 2) Project, if this is of interest to the client.
- 5) Supporting documentation (references, etc.)

### **Specialized Business Planning and Management (Step 2) Final Report Outline**

- 1) Executive Summary
  - Short (e.g. 1 page) overview of the project goals, agreed upon deliverables and work completed
- 2) Business Planning and Management Coaching Record Sheets
  - 1 per coaching session: see Appendix B
- 3) Specialized Business and Financial Services Reports
  - Analysis and findings for each Specialized Business and Financial Planning area agreed upon in the project proposal
- 4) Discussion and Recommendations for Next Steps
  - 1-2 page discussion of next steps and recommendations to further the Program Applicant's business planning and management goals
- 5) Supporting documentation (references, etc.)

### **General Guidelines**

In addition to the sections for Business Plan Coaching and Development (Step 1) and Specialized Business Planning and Management (Step 2) Final Reports outlined above, all reports must be of professional quality and reflect thorough, accurate information, research and analysis, be free of grammatical and typographical errors and have consistent formatting. All Final Reports must include when applicable:

- References or works cited
- Appendices for any calculations used to complete the analysis
- Other supporting documentation

## APPENDIX B:

### BUSINESS PLANNING AND MANAGEMENT COACHING SESSION RECORD SHEET

(A fillable Word version of this document is available for download from the program webpage)

Session Details			
<b>Date</b>		<b>Session #</b>	
<b>Duration</b> (e.g. 1 hr., 1.5 hr.)		<b>Method</b> (e.g. phone, in-person, video conference, etc.)	
<b>Who is present?</b> (list all in attendance)			

Session Summary	
<b>Session Goals</b> List 2-4 goals related to key topics and discussion areas for the session.	
<b>Check-in on follow-ups from previous session</b> Review follow-ups from last session and progress made.	
<b>Session Notes</b> Provide a concise summary of the discussion, including key information and resources shared, points raised and questions discussed. Feel free to include additional notes or resource sheets as an attachment.	

Looking Ahead					
<b>Action Items</b> What will you each do between now and your next session? List any follow-ups or next steps identified during the session.	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="background-color: #f2f2f2;"><b>Client</b></td> </tr> <tr> <td>I will:</td> </tr> <tr> <td style="background-color: #f2f2f2;"><b>Consultant</b></td> </tr> <tr> <td>I will:</td> </tr> </table>	<b>Client</b>	I will:	<b>Consultant</b>	I will:
<b>Client</b>					
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I will:					
<b>Plan for next session</b> Provide a few words on your plan for the next session.					

*This information is intended only for use by the B.C. Indigenous Agriculture Development Program Applicant and their Qualified Business Consultant. This information will also be collected by the B.C. Ministry of Agriculture, Food and Fisheries as part of the Final Report under section 26(c) of the Freedom of Information and Protection of Privacy Act for the purpose of project and program evaluation. If you have any questions about the collection of this information, contact the B.C. Indigenous Agriculture Development Program Manager at [Agribusiness@gov.bc.ca](mailto:Agribusiness@gov.bc.ca) or 1-888-221-7141.*

## **APPENDIX C:**

### **BASIC BUSINESS PLAN OUTLINE**

#### Recommended Sections for Your Farm Business Plan

A business plan serves multiple important functions that strengthen your business now and in the future. It is a road map for your business that clearly defines your goals, operational procedures, financial strategies and other key components of your operation. It is also a tool that can be brought to (and is often required by) banks, financial institutions and other lenders or investors when you are seeking credit or investments in your business.

While a completed business plan is of great value to running and building your business, the *process* of creating your business plan is an extremely valuable opportunity in and of itself. Creating your business plan is a chance to take stock of your strengths, identify areas in which you may benefit from improvements and external expertise, and reflect upon and evaluate your vision and goals for your operation.

Below is a checklist for a typical business plan:

- ☐ **COVER PAGE**
  - ☐ Farm Name, Owners, Address, Email, Telephone
  - ☐ Website, Instagram, Facebook, Logo (if applicable)
  - ☐ Farm Picture
- ☐ **EXECUTIVE SUMMARY**
  - ☐ Farm History, Size and Location
  - ☐ Overview of What the Business Does and Key Accomplishments
  - ☐ Future Business Growth Plans
- ☐ **BUSINESS STRATEGY**
  - ☐ Vision
  - ☐ Mission
  - ☐ Goals
- ☐ **OWNERSHIP, MANAGEMENT, AND HUMAN RESOURCES**
  - ☐ Business structure
  - ☐ Key Partners
  - ☐ Employees and Job Descriptions
  - ☐ Human Resource Plan
  - ☐ Succession Plan
- ☐ **MARKETING STRATEGY**
  - ☐ Industry and Competition
  - ☐ Market Research
  - ☐ Target Market
  - ☐ Marketing Goals
  - ☐ Sales Channels
  - ☐ Sales Calls
  - ☐ Product Promotion
  - ☐ Products and/or Services
  - ☐ Hours of Operation
  - ☐ Product Pricing
- ☐ **PRODUCTION PLAN**
  - ☐ Existing Production
  - ☐ Existing Production System
  - ☐ Future Production Goals

- ☐ Future Production System
- ☐ Suppliers
- ☐ Staff Requirements
- ☐ Added Value Processing
- ☐ Site Plan, Pictures, and/or Diagrams
- ☐ **FINANCIAL PLANNING**
  - ☐ Start Up Costs(For New Entrants)
  - ☐ Net Worth Statement
  - ☐ Income and Expense Statement
  - ☐ Existing and Future Sales
  - ☐ Cost of Production by Enterprise
  - ☐ Cash Flow Statement
  - ☐ Partial Budget
  - ☐ Sensitivity Analysis
  - ☐ Key Performance Measures
- ☐ **RISK ASSESSMENT AND MITIGATION**
  - ☐ SWOT Analysis
  - ☐ Strengths
  - ☐ Weaknesses
  - ☐ Opportunities
  - ☐ Threats
  - ☐ Operational Risks
  - ☐ Risk Mitigation
- ☐ **CONTINUOUS IMPROVEMENT PLAN**
  - ☐ Planned Timing to Assess, Plan, Implement, Review My Business Plan

## **APPENDIX D: BUSINESS PLANNING AND MANAGEMENT COACHING TOPIC EXAMPLES**

The process of developing or enhancing your business plan is a valuable opportunity to take stock of your current strengths and work with a Qualified Business Consultant to address areas for improvement. Coaching is an important component of this work. It will help you build your business planning and management skillset and apply it to your business. A range of topics may be covered during business planning and management coaching in order to improve business planning and management skills and to build or further develop your business plan.

The following is a list of some of the possible topics that may be relevant to your business planning, management knowledge and skills development goals. Most of these topic areas also have multiple possible sub-topics, most of which are not listed here. It is unlikely that you could cover all of these areas in depth during your project, which is why it is important to reflect on your priorities and where you would find the greatest benefit.

Talk to your consultant about your interests and priorities to develop a coaching plan that meets your needs. In your application form, you are also asked to complete a self-assessment to identify your business planning and management strengths, weaknesses and priorities. The [Taking Stock Self-Assessment Workbooks](#) (available for download from the B.C. Ministry of Agriculture, Food and Fisheries's website) are another excellent resource to assess your current strengths, identify areas for improvement and establish priorities for business planning.

### **Examples of Business Plan and Management Coaching Topics:**

- Purpose of a written Business Plan
- Overview of a Business Plan and understanding core components
- Business strategy
  - Building mission, vision, purpose statements
  - SMART goal setting
  - SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis
- Business structure
- Marketing strategy
  - Understanding contracts, joint ventures and other partnerships
  - Customer profiles
  - Market and industry competition
- Financial management and production economics
  - Costs to produce a product or provide services
  - Projected (monthly, quarterly or yearly) sales revenue
  - Fixed and variable expenses
  - Cash flow analysis
  - Required financing and sources
  - Projected income and Net Worth
  - Key financial indicators/ratios.
- Social responsibility, triple bottom line and other tools to account for multiple socio-cultural, economic and ecological priorities
- Human resource management
- Risk assessment (tools and strategies)
- Succession/Transition planning

- Measurements of success and performance to update and evolve the Business Plan
- What financial institution(s) and/or potential investors consider when making investment decisions