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Foreword

Auckland City Council's economic development strategy aspires for Auckland city to have a more productive and globally connected economy, one that delivers jobs, higher incomes and improved living standards for Aucklanders. <http://www.aucklandcity.govt.nz/council/documents/edstrategy/docs/edstrategy.pdf>

The strategy is one of council's seven strategies that define how council's resources will be used to achieve the vision for the city, as outlined in the Auckland City Council's 10-year plan 2009-2019. <http://www.aucklandcity.govt.nz/council/documents/10yearplan/default.asp>

The objectives of the Business Improvement District (BID) programme fall in line with the economic development strategy. To achieve and further enhance the positive economic outcomes the BID programme is delivering, we have gathered relevant supporting information in a set of best practice guidelines. With a view to continuous improvement, these guidelines are designed to be updated and expanded as necessary. The guidelines include material related to and supportive of the BID policy and governing constitution. They also contain further information for integrated best practice across BID programmes.

<http://www.aucklandcity.govt.nz/auckland/economy/mainstreets/default.asp>

These guidelines are a "hands-on" resource to help BID organisations develop best practice. They also have a broader focus, providing relevant information on everything from planning, governance and financial management to fundraising, communication and human resources. The aim is to achieve consistency in application of the BID programme across Auckland city.

Janet Schofield
Business development area manager
Economic Development group
Auckland City Council



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STRATEGIC MANAGEMENT

Overview

Strategic management is the process of formulating, implementing and evaluating decisions that will enable a BID to achieve its long-term objectives across all of the four activity areas of business development, strategic management, promotion, events and marketing and urban design and heritage environment. Strategic management provides overall direction to the BID. Some mechanisms to assist achievement of these objectives are:

Planning

Planning is an essential process regardless of the size of the BID but must be tailored to its needs - for example, not everyone will need a separate communications plan or marketing plan.

Once a plan is developed, it is important to monitor and review progress and keep the plan up to date. The plan is a living document which should be changed as the BID evolves and to meet the changing needs of the business community.

Type of plan	Description	Timescale	Responsibility
Strategic plan	Looks at the long term outcomes for the BID Sets the overall vision/mission and the broad strategic direction of the BID Sets out how you plan to achieve the outcomes.	3 - 5 years performance measured annually	BID committee/ board
Business or annual plan	More detailed plan – the steps to make the strategic plan happen Includes SMART ¹ objectives Monitored at regular (monthly/quarterly) committee meetings May include sub-plans e.g. financial plan/budget/funding schedule, marketing plan, and communications plan.	Annual	Manager and committee
Financial plan	Includes a budget and forecast	Annual	Treasurer and committee
Communications plan	May relate to the overall communication activity of the BID, or to a specific project	BID level or project specific	Manager and committee
Marketing plan	Linked to the business plan, the marketing plan focuses on how your BID reaches its market(s), which should include members as well as the customers (existing and potential) and other stakeholders	Annual – links to business plan	Manager and committee

¹ SMART : Specific, Measurable, Attainable, Realistic, Timely



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Implementation

The goals and objectives of the strategic plan are reflected in the annual business plan. These objectives are further broken down to specific tasks to be implemented within set timeframes over a 12-month period. These tasks are allocated to sub-committees or to the BID manager or other staff. The BID manager will report on progress to BID committee meetings as required.

Monitoring/Measurements

Monitoring and evaluation of a plan at regular intervals will help improve the BID programme or service. Monitoring of progress against the business plan should be a part of the regular BID management committee meetings. Timely feedback on strategic plan outcomes will demonstrate value to customers and other stakeholders.

This practice can also feed into changes to the strategic plan as necessary. Evaluation is an essential phase in the planning cycle and will provide the BID with information to improve the programme.

Key Performance Indicators (KPIs)

Ideally, performance indicators should be fully accepted and agreed upon. To achieve this, it is important for those most closely involved to participate in their development. BID's success is the result of a collective effort. Indicators should be identified with the most direct relevance to the commercial centre or town centre.

Some of the benefits of adopting performance indicators are:

- Assist in clarifying the vision and priorities of the BID, setting direction, identifying objectives and determining actions
- Clarify the expectations of BID members and other stakeholders
- Ensure BIDs continuously improve performance, demonstrating value and increasing confidence within the business community
- Identify whether the activities or projects of the BID are effective, assist in highlighting improvements, priorities, and streamlining the focus of activities

Strategic Plan

Strategic planning provides direction for a Business Improvement District (BID) to achieve its goals and aspirations and clearly identifies the preferred future (outcome) and the steps needed to get there.

The strategic plan states the vision and objectives, and the actions needed to achieve the vision. It focuses on the "big picture" and has a time horizon of three to five years.

A strategic plan provides the framework for a business plan, financial plan, marketing and promotions plan and communications plan. These plans identify the specific tasks to be undertaken. They have detailed budgets and a full description of the people, skills and resources needed to complete the tasks.

Planning helps a BID understand itself better. Involvement in the strategic planning process enables members to have direct input and involvement in their BID's economic future.

A BID's strategic plan should align with council's overall vision, Auckland City Council's 10-year plan 2009-2019 and council's economic development strategy.

<http://www.aucklandcity.govt.nz/council/documents/edstrategy/docs/edstrategy.pdf>

<http://www.aucklandcity.govt.nz/council/documents/10yearplan/default.asp>



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The strategic planning process

- Identify the BID's vision, purpose and values
- Environmental scan - look at what is currently going on in the wider community and what is planned for the future that may impact on the area.
- PESTE/SWOT and stakeholder analysis (see below) - what can help or get in the way of achieving the mission.
- How you plan to get there - setting the more specific goals (or outcomes) and strategies. Keep this list short - a maximum of three goals (or intermediate outcomes). This also feeds into the business plan, which should be done at the same time.
- If possible, get someone outside of your organisation to facilitate the planning.
- Make use of 'brainstorming' techniques to capture ideas and themes.

Step One – Gathering information, initial research

It is crucial that all strategic planning is built on a solid foundation of useful and relevant information. Although participants will bring a wealth of knowledge and experience to the workshops, they must also have access to additional key data so they can make informed choices about options and priorities.

Before the strategic planning process starts, the BID needs to undertake some basic research about the community.

Environmental scan

An environmental scan means checking on what is going on, or what may happen in the future, that may have an impact on the BID work. The things to consider are:

- What's happening in the wider community that may affect your BID or the council and other organisations it works with.
- Economic or social trends.
- Any developments planned for the future.

Consider a wide range of areas - such as, transport, new construction or buildings being planned, employment trends, new industries or factories entering or closing, population trends (aging population, migration, ethnicity changes - both within New Zealand and internationally).

Some sources of information for carrying out an environmental scan are:

Public information

- Council policies and plans including the Auckland City Council's 10-year plan 2009-2019. <http://www.aucklandcity.govt.nz/council/documents/10yearplan/default.asp>
- Economic development strategy and other strategies which underpin all council activities <http://www.aucklandcity.govt.nz/council/documents/edstrategy/docs/edstrategy.pdf>
- NZ Statistics holds demographic data about geographic areas and broad information such as population, age, sex, cultural mix, employment, individual and household incomes. NZ Statistics can provide retail survey information about retail spend activity in your area www.stats.govt.nz

PESTE analysis

A PESTE analysis is a specific example of an environmental scan in which you consider the following:

political
economic
social (and cultural)
technological



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environmental

To do a PESTE analysis:

1. Under each of the PESTE headings, make a list of what factors may influence the BID
2. Consider how these factors might affect the BID.

This information will feed into the SWOT analysis

SWOT Analysis

A SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis is another useful tool to map out a range of factors that will have an impact on your organisation; both internal (which you can influence) and external (recognise you may have limited influence over).

The PESTE analysis will provide information about the external factors i.e. the **Opportunities** and **Threats** part of the SWOT analysis.

To do a SWOT analysis:

Figure 1: SWOT Analysis Template

Internal factors	Strengths	Weaknesses
External factors	Opportunities	Threats

Complete the template by noting the strengths, weaknesses, opportunities and threats that will impact on the BID.

Situational analysis

The situational analysis section of the strategic plan presents information and research findings in an accessible form. It will contain:

- Background to the BID programme
- Achievements so far
- Organisational arrangements of the BID programme
- Connections with other organisations
- Key issues of interest to the BID programme e.g. transport, security
- A summary of the key findings of information gathered and research
- Implications of the findings for the strategic plan

The situational analysis is a useful resource for the BID planning workshops, particularly for developing a SWOT analysis. It will also be helpful later in developing project plans, the managers/coordinator's work plan and for reviewing the strategic plan after its first year of implementation.

Step Two - Direction setting workshop.

The direction setting workshop is a business member meeting which generates enthusiasm, gathers support and motivates people to be involved. It needs to be a high-energy event with maximum involvement - there should be as wide a representation of businesses or property owners as possible.



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Invite key stakeholders in person. Publicity flyers and articles in local media should send a clear message about the aims of the workshop and the benefits of being involved.

This step of the planning process seeks to answer the question:

Where do we as a business community want to go?

What should be covered:

- Aims of the BID programme should be clearly communicated. It is especially important that business members understand the value and significance of the programme to their business.
- Outline of situational analysis and research findings might give insight into the issues affecting the BID
- Examples of approaches taken by other BIDs
- Visioning session to get people thinking about the future for the business community and BID area
- Prioritisation of outcomes and objectives for the Strategic plan.

The results of the workshop will typically provide:

- Increased understanding of issues affecting the business community
- Shared vision for the business community's future
- Development of key result areas
- List of objectives and priorities for these key results areas

Step 3

Develop a strategic plan using the outputs of the direction-setting workshop

Step 4

Implement the strategic plan

Step 5

Monitor and evaluate the strategic plan

Measures and Monitoring

Evaluation of a plan at regular intervals will help improve the programme or service offered by the BID. Monitoring should be undertaken regularly, and if possible, on a continuous basis; it should be systematic, planned, purposeful and meaningful.

Monitoring can:

- Check progress against the BID business plan (including any specific marketing or project plans) and/or
- Monitor the services a BID provides (e.g. events, security, business development)
- Provide information to inform planning
- Set a reliable basis for service evaluation

Reporting against the business plan should be a regular part of the executive committee meeting (monthly or quarterly).



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Evaluation is an essential phase in the planning cycle, and will provide the BID with information to improve the programme or service.

Evaluation helps to find out:

- Whether the project or programme being evaluated is working as planned.
- The impact that the BID/project or programme is making.

Monitoring External Trends

It is also important to monitor trends that may impact on overall service demand or provision, such as:

- Changing consumer/client groups
- Demographic changes in the wider community
- Changes in local agency approach
- National policies
- Impact of any particular local or major events
- Economic climate

Business Plan

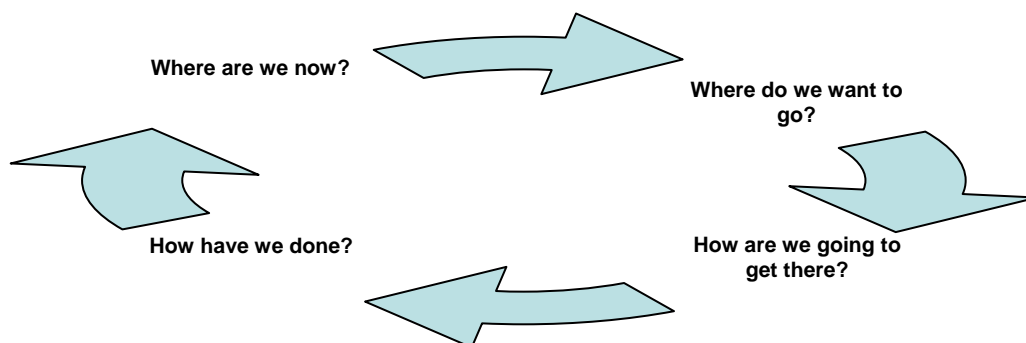
A business or annual plan outlines what is to be achieved by the BID over the next 12 months. Whereas the strategic plan looks at the long-term strategy (i.e. how you will achieve your ultimate goals and mission), the business plan has a shorter-term focus and is more specific about:

- The actions the BID will take
- Who is responsible
- How long it will take
- Resources required
- Monitoring of progress

The business plan is informed by the strategic plan. It should include tasks that have been prioritised for action over the next 12 months.

All planning on a monthly or quarterly basis should be referenced back to the business plan to ensure priorities are achieved within their required timeframe.

A business plan follows a cycle and should include a feedback mechanism.





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Who will be interested in the business plan?

- BID manager, board and members
- Auckland City Council
- Agencies which provide funding or sponsorship

Who should be involved?

- Key people within the BID including staff and business leaders
- BID committee – the committee bring individual and collective skills and strengths and it is essential that the committee is fully involved in the business planning process
- BID members
- External partners or advisors with specific expertise in business planning

Business plan template is found in the templates section.

Communication Plan

The communication plan outlines the communication approach for the BID and delivery methods.

The BID will undertake communication activities that:

- Inform members about what they are doing
- Promote the BID area locally
- Attract new members, supports and donations
- Advertise services, products or events
- Influence change of some kind

Communication tools

There are a large number of ways to communicate both within a BID organisation and to external audiences, including:

- Written material e.g. annual reports, fact sheets, articles, newsletters, brochures, posters, media releases, organisational policies, minutes of meetings
- Technology-based material e.g. internet, email, e-news, pod-cast, text messaging
- Media e.g. newspapers, magazines, tourism brochures, radio and TV
- Phone calls and face-to-face
- Direct public influence e.g. public meetings, promotional events, speeches/public appearances
- Advocacy (including lobbying and forming alliances)
- Submissions (written and verbal)
- Networking (informal and formal)

Detailed communication plan

Elements that should be included in a communication plan:

- Background – objectives of the BID, research to inform strategy



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- Communication objectives – what does the BID want to achieve with the message
- Key audiences – who are the target audiences, what channels do these audiences prefer
- Issues – what are the issues of concern to the key audiences
- Communication strategy – overall approach
- Key messages – what are the key messages to be communicated
- Tools / methods – what channels are appropriate to deliver the message
- Action plan – what actions are required to start, maintain and complete the process
- Accountabilities / timelines – timelines for each action and who is accountable
- Budget – money available to be spent
- Measures – measurement tools and targets to evaluate against objectives
- Identify risks

Process

- Finalise communication plan
- Implement plan
- Review progress
 - Monitor the effectiveness of the communications plan as the project is implemented
 - Debrief at the end of the project to determine whether the BID objectives were met and work out what you would do differently next time.
- Make changes to the communication plan, as required

The communication plan template is available in the templates section.

Marketing and Promotion Plan

A marketing and promotion plan identifies a unique point of difference and brand positioning for the BID. It will suggest tools and channels for promoting the BID, based on research to identify customers needs and expectations. This will allow the BID to develop existing and new services to match their needs. Key strengths and advantages of the BID will be identified and used to promote the BID area. Planning will ensure that BID resources are employed in the most effective way.

The BID requires the understanding and buy-in from all members of the organisation to successfully implement a marketing plan.

Marketing and promotion tools

- Brand development
- Logo and positioning statement
- Website and e-newsletter
- Signage
- Media advertising
- Face to face e.g. events, conferences, networking
- Marketing collateral e.g. promotional brochures, fact sheets, flyers, posters, badges, bags, dvd
- Public relations e.g. interviews, articles, lobbying, journals, media releases



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Detailed Marketing Plan outline

Elements that should be included in a marketing and promotion plan:

- Market research and data (to identify customer needs and expectations)
- Strengths, opportunities, assets and advantages
- Marketing objectives (based on strategic BID objectives)
- Key audiences
- Marketing overall strategy and proposition
- Unique selling point or point of difference and key messages
- Tools/channels
- Action plan
- Accountabilities/timelines
- Budget
- Measures – measurement tools and targets to evaluate against objectives
- Identify risks

Things that may need to be considered:

- Changes to customer services and delivery
- Approach different customer groupings
- Need for more research

Process

- Finalise marketing and promotion plan
- Implement plan
- Review progress
 - Monitor effectiveness of the marketing and promotion plan as implemented
 - Debrief regularly to determine whether BID objectives are being met
- Make changes to marketing and promotion plan

The marketing and promotion plan template is available in the templates section



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FINANCIAL MANAGEMENT

Financial management is the discipline of managing money raised or received. Doing this well is essential to a BID's effectiveness and longevity.

Financial management of a BID will include:

- Financial planning
- Record keeping
- Reporting
- Auditing
- Fundraising

Financial planning

A financial plan shows what the total expenditure is likely to be and when money will be required, it may include a:

- **Budget** – forecasting income and expenditure for the next 12+ months
- **Cash flow forecast** – a monthly break down of expected receipts and payments,

Recording keeping

The Treasurer is responsible for providing financial transparency and accountability to the executive committee and ensuring that processes and reporting requirements are met.

The Treasurer is therefore responsible for maintaining all financial records. It is a good practice to keep annual accounts and audit reports permanently. All records are required to be kept for a certain period under certain legislation acts.

Reporting

Monthly financial statements should be presented to the executive committee for their review. The quarterly financial statements are required to be approved by the Executive committee and forwarded to the Council.

The Treasurer is responsible for preparing the monthly / quarterly / annual financial statements. Audited annual financial accounts should be prepared and presented at the BID AGM and a copy submitted to the Council.

Auditing

Auditing is the process of independently reviewing and checking that the annual financial statements present a true and fair view of the financial activities for the year under review. A qualified independent auditor should be appointed to fulfil this task. The Treasurer is responsible for submitting a complete set of financial statements to the auditor so that they can complete the end of year audit.

Fundraising:

Seeking additional funding is one option available to support the Business Improvement District. It is important to consider the timeline and when funds will be received relative to when they will be spent. Additional sources of funding may include:

- Sponsorship
- Grants
- Advertising revenue
- Subscriptions



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- Event fees

When organising community events or projects, there may be an option to set up a Trust to raise charitable funds. The objectives of the Trust should be broad enough to cover all anticipated actions. Key people in the community would need to be available to act as Trustees. The Charities commission website outlines the criteria for a Trust to gain charitable status.

A Trust will act as a non-profit organisation to further community aspirations in the local area, and should be complimentary to the role of the BID.

Financial Plan

A financial plan shows what your total expenditure is likely to be and when money will be required, it will include:

- **Budget** – forecasting income and expenditure for the next 12 months
- **Cash flow forecast** – a monthly break down of expected receipts and payments

Budget

The Treasurer has the key role in preparing the budget, but he or she will need to work closely with the BID executive. Once the budget is approved, it is added into the accounting system to ensure the BID can use it to compare actual to budgeted income and expenses.

A recognised accounting software programme should be used for all financial planning and reporting, such as MYOB, Quicken, Xero.

To prepare a budget:

- Start with the actual income and expenditure from last year
- Add what is proposed for the current year
- Adjust and modify until a realistic and reasonable budget is arrived at
- Gain approval of the budget from the BID executive committee

Cash Flow Forecast

To prepare a cash flow forecast:

- Break the budget down by month
- Add in opening bank balance, grants, receipts, outgoings and calculate closing balance.

Reporting

The quarterly financial statements in relation to the Business Improvement District are required to be approved by the BID executive committee and forwarded to the Council.

The Treasurer is responsible for preparing the following two quarterly financial reports for approval of the BID executive committee:

- Statement of financial performance (profit and loss) showing income and expenditure
- Statement of financial position (balance sheet) showing assets and liabilities

Under the Incorporated Societies Act 1908, every incorporated society must file a certified copy of its annual financial statement with the Registrar of Incorporated Societies. The annual financial statement will include



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the income and expenditure of the society for the previous financial year and the assets and liabilities, any mortgages or secured loans affecting the society's property as at the end of the financial year.

Annual financial statements can be filed online at www.societies.govt.nz or a paper form can be downloaded and filed.

It is also a requirement that annual audited financial statements be prepared and submitted to the Council.

Fundraising

In addition to the BID targeted rate, BID executive committees may raise funds through other mechanisms; including sponsorship, advertising and grants.

Fundraising is all about relationships and communication. Seeking additional funding is one of the most important tasks facing the BID. It is important to consider the timeline and break down tasks into manageable pieces.

The five-step approach to raising funds is:

- Gather comprehensive information about the project
- Find out about funding sources and possible activities
- Create a fundraising plan
- Implement the plan
- Account for funds received and evaluate the plan

Fundraising plan

A fundraising plan will assist the BID to set clear fundraising objectives and to set strategies for achieving the goals of this plan.

The fundraising process involves the following steps:

- Identify the purpose of obtaining funds
- Check whether fundraising is necessary – consider what is available and whether there are other ways of achieving the purpose e.g. does another group have the equipment that could be used, rather than money, could there be a donation of a service or item instead
- Identify funding organisations
- Establish a fundraising committee – build a team of people who will help in raising the money and provide support in the planning process
- Set a budget
- Set goals – work out how much money is needed to be raised and by when, then break that down into manageable pieces
- List any other resources needed – check these against the resources already available: people, equipment, transport, facilities etc.
- Evaluate funding options
- Account for any funding received – this includes tax implications, keeping accurate records for the BID organisation and for the funding organisation and/or donor
- Develop strategies (including a timeline) to put the final plan into action. Make sure these strategies fit into the overall income plan.



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- Raise and account for funds
- Evaluate success of fundraising plan
 - A completion report needs to go out to the funding organisation to show them how the funds have been utilised and the value delivered
 - Should also factor in media releases or publicity via website to promote positive outcome of the activity

Business Sponsorship

Sponsorship is a two-way agreement in which a company will offer cash, product or service to support a particular activity, in return for added profile or business for that company.

In order to gain sponsorship, the BID will need to clearly state the benefits, for example:

- Company or brand exposure, potential for increased sales and /or logo placement.
- Highlight an opportunity such as a project, event or activity that is seen as attractive to the potential sponsor.

Sponsorship strategy

This will involve:

- Identifying activities suitable for sponsorship
- Writing a clear summary of and budget for the proposed activity
- Identifying potential benefits for the sponsors
- Establishing the value to the sponsor
- Identifying potential sponsors
- Writing the sponsorship proposal
- Approaching the sponsor
- Follow-up with the sponsor

Structure of sponsorship proposal

- Covering letter – address the proposal to the most appropriate person in the sponsor’s organisation
- Objectives - outline the objectives of the BID
- Overview – provide an outline of the project. Relevant statistical information in the sponsorship proposals can help the assessor get a picture of the BID or event and identify cost benefits.
- Investment sought – outline the funding amount or in-kind support being requested and the period of time for the agreement
- Sponsorship benefits – this is a critical component. Media exposure is an important factor for company sponsorship, wherever possible provide some or all of the following elements; radio, TV, print and community access, in a sponsorship package.
- Target market – outline who the project is aimed at and how it matches the target market of the proposed sponsor.
- Exclusivity – detail other sponsors and/or supporters of the project. Make sure that sponsors are not in direct competition with each other.
- Servicing the sponsors’ needs – identify a designated point of contact for the sponsor.
- Evaluation strategy – proves to the sponsor that their time or money was well spent



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- Conclusion – summarise the proposal, include how the outcome of the activity/event will be followed up with publicity, success story, identify a follow-up procedure and supply contact details

Record Keeping

The Treasurer is responsible for providing financial transparency and accountability to the BID executive committee and to the Council, and ensuring that processes and reporting requirements are met.

The Treasurer is responsible for maintaining the following records:

- Receipt book for monies received
- File for income invoices and paid accounts
- Petty cash book
- Accounting system (such as MYOB, Quicken) to account for all transactions.

It is required under certain legislation acts to maintain and retain certain records of information. For e.g.

- Business financial records
- Employment records
- Vehicle mileage records/log books
- Charitable organisations need to keep records of donations received and how the funds have been spent
- Constitution
- Minutes of general meetings
- Annual reports
- Trustee, board or committee records for other organisations

For details on legislation and period of retention of records, please refer to the following websites:

- www.legislation.govt.nz
- www.ird.govt.nz
- www.companies.govt.nz
- www.ers.dol.govt.nz
- www.osh.dol.govt.nz
- The IRD website has a lot of information about keeping records (both manually and electronically) www.ird.govt.nz.
- The website of the Office of the Privacy Commissioner has information and resources on the rights and obligations under the Privacy Act — www.privacy.org.nz.
- Keeping it Legal E Ai Ki Te Ture website — www.keepingitlegal.net.nz.
- Archives and Records Association of New Zealand website — www.aranz.org.nz.

Auditing



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GOVERNANCE

Overview

Good governance creates a strong future for a BID by continuously steering it towards an identified vision and making sure that day-to-day management is lined up with the BID's goals. At its core, governance is about leadership; it ensures the BID remains viable and thrives.

The executive board is responsible for the overall direction and supervision of the business and affairs of the BID.

Management puts in place the policies set down by the executive team and coordinate the day-to-day activities to achieve the BID's goals. The BID manager and other staff deliver management tasks and report back to the executive board on progress

Governance:

The executive board discharge responsibility by having adequate systems in place to ensure that:

- Goals, plans and budgets are approved and reviewed
- Performance against objectives are monitored
- Management is conducted in a professional and competent manner
- Proper accounting and auditing practices are operating
- All matters of importance are brought to the attention of the executive board, and/or council as appropriate, through a system of prompt and comprehensive reporting

Management

To enable the BID to achieve its goals, the BID manager will:

- Put forward a plan of action to best achieve the goals of the BID
- Engage appropriate staff to undertake the necessary tasks
- Develop practices and procedures to ensure the BID runs smoothly
- Implement auditing procedures
- Have KPI's in place to monitor and measure desired results
- Report regularly to the executive board

Effective governance

Effectively functioning BID executive boards have:

- a good skill mix
- an effective chairperson
- committees for specialist tasks
- well managed meetings
- dynamics that allow free expression of different perspectives — an effective chairperson, backed by a strong vision for the organisation and clear protocols, can make sure all perspectives are taken into account
- outside specialist help on some issues



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- good self-evaluation

Studies on successful organisations also show that effective boards demonstrate a strong understanding of the difference between management and governance

Executive board - BID Manager relationship

An effective and productive executive board /BID manager relationship is built on:

- mutual respect for their separate, but mutually interdependent, roles and responsibilities
- a clear and unambiguous definition of the results to be achieved
- clearly defined and documented delegation and authority
- mutual agreement about the boundaries of freedom granted to the BID manager to carry out his/her role and tasks
- a fair, ethical and transparent process for evaluating the BID manager's performance
- an ability to engage in robust debate and a mutual willingness to challenge and to offer and receive constructive criticism.

Committee Management

Committee Officer Roles and Responsibilities

Specific Duties of the BID Chairperson

The role of the BID chairperson is a critical one. In addition to his/her general governance duties the chairperson, together with the BID manager, represents the BID organisation to owners, stakeholders, the financial community and the public.

The main responsibilities of a BID chairperson are to:

- Lead strategic planning
- Manage relationships
- Ensure risks to the BID association are managed
- Monitor the BID manager's performance
- Encourage all executive board members to contribute to debate and decision-making
- Manage executive board processes.

More specifically, the BID chairperson is expected to:

- conduct efficient executive board meetings
- set annual meeting timetables
- prepare meeting agendas
- manage the distribution of papers in advance of governing body meetings
- ensure accurate recording of meeting decisions
- liaise with the BID manager outside scheduled executive board meetings
- instruct the auditor (in the absence of a finance sub-committee)
- establish BID sub-committees for specific tasks and define their terms of reference
- attend executive board meetings



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- make sure the BID resources are being well and appropriately used.

Specific duties of the BID treasurer

The BID treasurer is the key financial officer of the BID executive board. This person may also provide a link between the executive board, staff and outside agencies.

The position of treasurer is critical to the successful management of a BID association. The treasurer is the first point of contact for people who need information or details about the BID's financial activities. The treasurer is responsible for providing financial transparency and accountability to the executive board and council, and ensuring that processes and reporting requirements are met openly and with accountability. They provide an assurance of the ongoing financial viability of the BID.

The BID treasurer's tasks may include:

- ensuring that the finances of the BID are managed appropriately
- making recommendations to the executive board about income and expenditure, investments and debts
- keeping records of all incoming and outgoing payments
- reviewing the annual statement of financial performance (profit and loss) and statement of financial position (balance sheet)
- ensuring that the annual audit process is undertaken in a timely fashion according to legal requirements
- providing regular financial statements to the executive board and council as appropriate and providing explanations where required
- drawing up the annual budget in consultation with the BID manager and other executive board members
- ensuring that sufficient funds are available at all times to support the BID's liabilities
- File GST, ACC and tax returns, as required, and PAYE payments for employees
- Ensure annual returns are filed with the Assistant Registrar of Incorporated Societies, Ministry of Commerce Companies Office

Specific duties of the BID secretary

The secretary is the key administration officer of the executive board. This person provides a link between the board, staff and outside agencies. The position of secretary is critical to the successful management of the BID association.

The secretary is often the first point of contact for people who need information or details about BID activities. An effective secretary also helps in co-ordinating executive board events such as meeting schedules, strategic planning and fundraising activities.

Duties and responsibilities of a BID secretary include:

- convening meetings and booking rooms
- dealing with correspondence
- preparing agendas for meetings (in consultation with the chairperson)
- taking the minutes of meetings
- ensuring background information is available at meetings, where required.
- Communication and public relations – both inward and outward



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- Record maintenance and filing systems
- Administration supplies/equipment/keys

Committee Member Roles and Responsibilities – Executive Board

The role of the BID executive board is to continue to develop a successful, attractive, sustainable and enjoyable commercial district or business centre. Each business district has different factors and economic drivers influencing its success, so must determine what its business community needs and target initiatives to service that need.

The most important qualities needed for a board member are:

- A desire to be a leader in the business community
- A keen interest in the promotion and development of the commercial district and business centre
- A positive attitude and professional approach
- The ability to work in a team

Roles and actions

- Recommending projects and priorities
- Managing staff and contractors
- Overseeing the spending of approved budgets
- Monitoring work progress against budgets and performance measures.
- Developing the annual business plan/budget and schedule
- Developing a promotions and marketing plan, including a media plan
- Guide and support staff in the implementation of all projects
- Maintain an easy line of communication between all businesses in the BID district
- Forward ideas/issues from the businesses 'on the ground' back to the board

Board members' tasks

- Attend at least six committee meetings per year
- Participate in sub-committees to address specific project issues
- Develop KPIs for the BID programme that the BID manager implements
- Receive monthly reports on progress against the BID's plan and quarterly reports on KPIs.
- Ensure the BID Manager and all other staff have an employment agreement, position description and performance measures.
- If required participate in the employment sub-committee and undertake a six-monthly performance review and annual salary review for the BID manager
- Attend neighbourhood group meetings as required
- Read reports/minutes prior to meetings, gathering information and actively participate in particular projects
- Encourage attendance and participate in events e.g. business-to-business networking meetings, annual general meeting, events, business seminars
- Follow meeting procedures guidelines



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- Abide by the duties and obligations of the executive board committee

Councillor and Community Board Member Roles and Responsibilities

Role of councillor on the BID executive board

The council will appoint a councillor to the BID executive board, in consultation with the BID executive board.

The role of the councillor is to:

- Attend BID executive board meetings
- Provide a governance overview to the BID association
- Participate in BID strategic planning and, where possible, ensure alignment with council strategies
- Provide council input into decisions about financial planning and proposed budget expenditure
- Monitor (alongside other board members) programme implementation against budget
- Provide information about council to the BID, e.g. council policies, strategies, processes and structures
- Act as a link between the BID and the council, and feedback BID concerns through appropriate council channels

Role of community board member on the BID executive board

The council will appoint a community board member to the BID executive board, in consultation with the BID executive board.

The role of the community board member is to:

- Attend BID executive board meetings
- Provide a governance overview to the BID association
- Participate in BID strategic planning and, where possible, ensure alignment with community aspirations
- Provide community board input into decisions about financial planning and proposed budget expenditure
- Monitor (alongside other board members) programme implementation against budget
- Provide information about the community board to the BID, e.g. policies and processes
- Act as a link between the BID and the community board, and feedback BID concerns through appropriate channels

Meeting Procedures

The BID chairperson

The ideal BID chairperson is:

- Impartial and objective
- Even-tempered and patient
- Firm but friendly
- Confident but considerate



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- Tactful and courteous
- A quick thinker
- Well versed in procedure

A chairperson can create productive meetings through:

- Helping to train the executive board in agreed meeting procedure
- Being impartial and unbiased in their actions
- Promoting the harmony of the executive board by reconciling views when possible
- Using any tensions productively to generate better solutions

The chairperson:

- Ensures the purpose of the meeting is achieved
- Seeks consensual agreement, where possible
- Ensures the will of the majority is carried out
- Ensures the constitution is upheld and relevant rules followed
- Is familiar with the constitution and meeting procedure
- Sees that minutes are kept
- Notes whether a quorum is present
- Starts and closes the meeting on time

Before the meeting:

- Oversees the development of the agenda in consultation with the secretary and other board members
- Is familiar with meeting business and correspondence, considering beforehand what issues are likely to arise

During the meeting:

- Provides all with an equal chance to put their views forward
- Guides the business of the meeting to avoid distractions
- Keeps business moving along without dampening discussion
- Clarifies matters with questions or comments
- Brings discussion to a close by putting the issue to a vote after appropriate debate

The Agenda

An agenda ensures:

- Important matters are dealt within appropriate order
- Committee members have notice of the business to be covered, in order to contribute better

The items listed below should feature on the BID agenda:



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Minutes

- A brief official record of the business of the committee
- An account of decisions made and actions to be carried out

Correspondence

- Inward correspondence should be grouped by subject and summarised for committee members
- Content of outward correspondence is discussed by the committee then handled by the BID secretary

Reports

- Reports such as those prepared by a BID manager or coordinator should show progress on actions from the previous meeting, reporting against ongoing goals and objectives and flag new issues.
- A treasurer's report includes receipts and expenditure for the period, balance in hand and accounts due.

General business

- General business is matters or questions raised by the executive board members.

Effective Committee²

Six practices important to Committee effectiveness:

1. Purpose of the committee:

The committee understands:

- responsibilities to management and key stakeholders
- purpose, legal and committee member responsibilities
- needs and expectations of BID members and key stakeholders
- difference between the committee's responsibilities and those of the BID manager
- vision and strategic direction

Committee establishes clear performance objectives for the:

- BID organisation
- BID manager
- BID executive board

Role of the BID executive board (committee):

- It is not the committee's job to manage the BID but to ensure the BID is well managed
 - assessing and ensuring the effectiveness of the BID manager through regular performance reviews
 - reviewing and approving annual goals through coaching, advising and mentoring

² Presentation by Penny Wood, 'Business for Life' Limited, April 2008



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Implications for successful committee:

- clarify the committee's value-added role
- concentrate on composition
- treat the committee as a real team doing real work
- dig in and design the work processes
- assess the quality of the committee



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HUMAN RESOURCES

Human resource management encompasses:

- Recruiting the best people for the BID association - interviewing, screening and selecting
- Training staff and volunteers – clear programme of personal and professional development
- Clarifying organisational roles
- Drawing up job descriptions
- Conducting staff evaluations and salary negotiation
- Staff conflict resolution and providing guidelines for the process, if necessary
- Maintaining staff and volunteer personnel records in accordance with privacy laws
- Taking care of employee benefits e.g. superannuation, leave entitlement
- Looking after the wellbeing of personnel in line with occupational, health and safety guidelines
- Looking after general wellness of staff - creating a safe, healthy environment
- Finding, and retaining personnel who can achieve the long-term BID association goals
- Adhering to relevant workplace legislation
- Ensuring the workload is shared
- Identifying and bringing in external providers to meet specific skills needs if these are not existing within the committee or in a BID manager

A BID manager adds great value to a BID programme; as a dedicated professional resource employed to undertake the activities of the programme, and work towards achieving its goals. Defining the roles, responsibilities, and competencies for the BID Manager will depend on the unique needs of the BID, and is influenced by the size, vision and objectives of the BID.

Recruitment Process

It is recommended that a separate employment sub-committee is established to handle the recruitment process.

Scoping the Role

Once the the roles, responsibilities and key competencies for the BID manager or coordinator have been determined, a position description should be prepared before completing any other recruitment documentation. The wording of the job advertisement and the structure of the interview questionnaire will be based on this description.

A position description is an important tool for sourcing potential candidates. Carefully designed, the position description saves time and additional work in the long run. It also provides the employee with clear direction and a framework on which to base their employment. The Strategic plan can be used as a starting point for developing a position description, since it clarifies what needs to be done.

The position description is also important for job evaluations, performance appraisals and training needs analyses as it outlines the employee's responsibilities and the competencies required for the job.

Position Description

A position description should have the following sections:



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- **Job Identification**
 - The formal title
 - The person or persons the position reports to
- **Position Purpose**
 - A short statement of what the position is set up to achieve. This should relate to the mission statement of the BID association and its key goals.
- **Working Relationships**
 - A short statement on key working relationships
- **Principle Accountabilities**
 - The main areas in which the position must get results to achieve its purpose.
 - The specific performance measures to determine whether the expectations are being met.
- **Competencies**
 - The level of skill, knowledge and ability required for the position

Advertising the Role

Job Recruitment

Attracting the best applicants depends on being clear as to what the position involves, and is effected by how much time is available for recruitment and the level of budget available to be spent on advertising.

An advertisement should contain the following key elements:

- use the same title as the Job description
- describe the BID association
- outline the major responsibilities and purpose of the role
- define the level of skill and experience the role requires
- detail benefits, rewards, training etc
- tell the candidate how and when to apply
- be clear about the closing date and time

Some sources for advertising are:

- Recruitment agency
- Newspaper advertising
- Work and Income
- Local networks and word of mouth
- E-newsletters
- Notices in local shops
- The internet e.g. www.community.net.nz , www.seek.co.nz



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Interview Process

As a starting point, thoroughly go through all applications, short list them and then proceed to setting up interviews.

Choose an interview panel that has a clear understanding of the skills and characteristics required has a good knowledge of the BID's goals and can carry out the interviewing effectively. Always have at least two interviewers present. Awareness of other cultures is important in the interview process. Employment sub-committee members must always adhere to the Human Rights Act 1993 and any Equal Employment requirements and practices.

Carefully plan and structure the interview. Prepare a question list to work through so that there is a uniform approach to all candidates giving everyone an equal opportunity to succeed.

Ensure the place of the interview is friendly and private. Establish a rapport with the applicant before beginning questioning and give them time during the interview to ask questions. Never ask questions that can be misconstrued under the Human Rights Act 1993.

In the interview, be very clear on the types of skills required for the position, as outlined in the position description. Base the recruitment decision on the skills and competencies required for the position.

Ensure all interview question forms are filled out in detail and kept on file for at least one year (in case of a Human Rights or Race Relations complaint/appeal).

Notify all unsuccessful applicants by letter and return their curriculum vitae.

Appointment

The employment agreement

It is mandatory to have a written employment agreement for all paid staff. A comprehensive well-drafted agreement makes for a clear understanding of obligations, work conditions and dismissal procedures for both parties. It establishes a professional employee/employer relationship.

On employment, the BID employee should receive a signed copy of their employment agreement, with the other copy retained by the BID chair or appropriate board member. This should be sent with a covering letter and a tax declaration form (IR12) for completion.

It is extremely important that an employment agreement is in place for all members of staff prior to their commencing employment with the BID association. This is the case regardless of the number of hours worked and is a legal requirement.

The BID association must act as a responsible employer. It must have in place a system for assessing and rewarding performance, and reviewing the conditions of employment.

Employment Responsibilities

Performance Review

An important aspect of performance monitoring is to establish a performance plan. This plan should be a practical and useful reference tool for the employment sub-committee and the BID manager or coordinator.

Performance plans should be negotiated:

- At the start of the job
- When a new person starts an existing job



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- When there are significant changes to the job
- When the term of the previous employment agreement has expired

The BID executive board is responsible to ensure that the BID manager (or other staff member) has an agreed performance measures plan. These performance measures should be in alignment with the BID business plan and Key Performance Indicators (KPIs). The BID manager submits a monthly report to the executive board on the progress against the BID business plan, and a quarterly report on KPIs.

Feedback sessions can be used to check on progress informally every few months.

A formal employee performance review should be held at least six monthly and a salary review annually. Progress is assessed against the performance plan and any specific performance concerns raised. This may require a plan of action to improve performance. Good performance should always be acknowledged.

Health and Safety

All New Zealand workplaces are subject to the Health and Safety in Employment Act 1992 that promotes the prevention of harm to all people at work.

The OSH website provides information on the act and offers guidance to assist organisations with health and safety in the workplace, www.osh.govt.nz

Disciplinary Procedures

In the event of breach of contract and/or insufficient performance of duties the BID will adhere to the following procedure;

- Discuss matter for discipline with employee to obtain satisfactory explanation (if any). Review the necessity of further training, assistance and support.
- Issue verbal warning to employee over disciplinary matters where explanation provided by the employee in 1 above is deemed unsatisfactory by the employer.
- On the reoccurrence of the same or similar breach of contract and/or unsatisfactory performance step one is taken again.
- If the employee's explanation is deemed unsatisfactory by the BID despite the provision or further training, assistance and support, the employee is given a written warning, which will be a final warning.
- On the re-occurrence of the same or similar breach of contract and/or unsatisfactory performance for the third time step one above is once again taken.
- If the employee's explanation is deemed unsatisfactory by the BID, the employee is issued with a notice of termination of employment, subject to the terms and conditions of the employment agreement.
- None of the above shall limit the BID's right to instantly dismiss employees without notice of termination or remuneration entitlements for actions regarded by the BID to be serious misconduct.
- In the event where the BID's trust of the employee is in doubt due to accusations of misconduct, the employer has the authority to suspend the employee immediately on full pay without notice whilst an investigation of the matter is undertaken.

Note. This is a guideline only. Specific employment circumstances may need to be referred to a legal consultant for specific advice.

For more information visit the website www.ers.dol.govt.nz/publications.



Find out more: phone 379 2020 or visit www.aucklandcity.govt.nz

Salary Review

A performance review should be held at least six monthly and a salary review annually. Once a year the performance plan may be used to decide whether an increment or a bonus is due. The BID association needs to be aware of this and budget for it accordingly.



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BUSINESS DEVELOPMENT

Factors and Economic Drivers Influencing Business Development

Each Business Improvement District (BID) needs to take advantage of its assets, advantages and human resources. These assets provide the foundation for strengthening the local economy. Businesses provide employment opportunities that increase the local community's wealth and prosperity.

Business growth is largely market driven. A strong business development programme will allow the BID to provide support and assistance for existing businesses to expand, new businesses to start up or businesses from elsewhere to relocate into your area. With a careful strategy, the BID can positively influence the rate of business growth.

Every BID area will have a range of types of businesses. The depth and spread of this range contributes to the robustness of the local economy. It is crucial to understand business diversity in order to strengthen the local business offer.

Strategies for business development include a focus on enterprise attraction, retention, expansion (growth) and diversification. It is important that a BID continues to present and market itself, around a 'unique selling point' and market offer so as to attract investment into the local community.

Business Expansion and Retention

The Business Expansion and Retention (BEAR) programme provides an up-to-date business profile of the town and starting point for future planning. The BEAR process (survey & visits) compiles information on the real problems, needs & opportunities experienced by businesses in your area. It should be noted, that the BEAR survey would only cover a sample of businesses, not all businesses, but this will be indicative of trends and impacts being felt by businesses operating in the BID.

Further details on the BEAR programme are provided in a separate section.

Business Prospectus

A prospectus can be developed as a tool to attract new business, investment or new development (including commercial and residential) into the BID area. Ideally, this should be professionally designed and published. It should provide an economic profile of the local business area and describe the environment in which businesses operate. A prospectus is a useful tool in selling the positive benefits, advantages of locating a business or investment opportunity to your town centre.

Developing a welcome pack

A welcome pack introduces the BID concept and your organisation to new businesses setting up locally. The welcome pack will provide a knowledge base on how the business community operates, set out minimum operating standards and help to attract engagement and participation from new business people right from the commencement of their business.

The right business mix

The quality and range of shops and business available in an area is one of the most critical factors in the selection of a business district by a customer. There is a recognised hierarchy of centres, which provides for local convenience shopping at one end through to regional comparison-shopping at the other.

Areas with a limited range of business services and retailers need to work on the convenience factors of the centre and ensure that the centre meets all the daily needs of customers. Customer service will be critical together with the ability of customers to complete their business quickly and easily.

Areas with a wider selection of business available should ensure that any gaps in services or goods required by customers on a weekly basis are covered. Consideration should be given to developing some areas of



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specialisation in retailing by attracting certain types and additional number of particular retailers that could attract customers from outside the immediate catchment. A large number of businesses offering a range of products and/or services will enhance the perception of choice and comparison for customers.

In any business area, it is important that the expectations of customers are understood and met, and that any gaps in services or retail are filled. The role and function of the business district needs to be defined, along with a unique point of difference if possible. This will help to differentiate the BID and inform a branding position. It may be possible to target and recruit national business chains, as well as local speciality retailers and service businesses.

The best location for new development or business start-up is also a consideration. In most cases, either new businesses make their own decisions on new locations or property owners or real estate agents recruit them. Yet the retail/business mix is one of the most important issues for any BID association. The executive board needs to have a strategy to actively recruit new businesses in identified sectors.

Executive boards that work closely with real estate agents may obtain early information on prospective businesses and work in partnership to impress potential new business owners.

Developing buy-in from all stakeholders

Stakeholder groups from which membership is drawn include all businesses operating in the business improvement district; professional, personal and service businesses, light commercial or industrial, cafés, restaurants, bars, and accommodation businesses.

The wider stakeholder group may also include residents, not for profit organisations, religious groups, migrant communities, visitors and tourists.

Tactics for gaining buy-in

There are numerous tools that can be used to strengthen buy-in over time. Some suggestions include:

- Promote key services and benefits being provided by BID in all communications
- Seek the views of stakeholders when developing key performance indicators (KPIs), most often completed as part of the strategic planning process. Ask the question “What indicators/results would provide evidence that the programme is a success?” If appropriate, end of year reports can focus on the results achieved for particular stakeholder groups.
- Seek the views of members on the types of events they consider would strengthen the overall results for the town centre or business district.
- Undertake an audit of the mix of businesses in the town centre. Publish it and seek feedback from stakeholders on the types of new businesses that would complement the centre.
- Publish data and information of interest to members and the wider stakeholder group e.g. increasing value of properties (both commercial and residential) in the area, increased occupancy levels, increased pedestrian numbers, growth in business turnover
- Seek out positive opinions on the area from local business and community leaders, commercial estate agents and economists on the potential of the area and publish their comments.
- Focus on building a unique physical environment. Lobby for appropriate improvements such as more parking, better pedestrian links, traffic access, street upgrades. Advise stakeholders of your efforts.
- Regular networking functions are a great way of gathering more interest and participation from members and the wider stakeholder group. Local businesses, accounting or law firms may be willing to sponsor a hosting event and bring in guest speakers to add more interest.
- Draw up a publicity plan and brainstorm ways that messages about your town centre or business district can reach a wider audience. For example, a positive story in the business section of the NZ



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Herald, local newspaper or Metro magazine will go a long way to helping change the perceptions of your area.

- Publish the names of the executive board members and their contact telephone numbers. Cultivate an open door policy in the office where people can call in to discuss issues of concern, or ideas for events or improvements. Allow time for public forum prior to each executive board meeting (by prior arrangement).
- Research information on business assistance programmes and publish these links on your website, include articles on improving profitability, marketing, new trends, economic data etc.
- Publish the shared vision and your mission statement in every single communication with your stakeholders. Publish your strategic plan to the website.
- The BID newsletter is the most important link that you have with your members and wider stakeholders. It is important to use this tool to communicate key messages and aspirations for the BID association and business community.

Landlord Engagement

Landlords can help accomplish the BID objectives and build a sustainable and vibrant community. The role of the landlord is to:

- Protect capital values
- Contribute to business mix strategy/criteria
- Provide well-maintained and managed property
- Provide appropriate security of tenure

Engaging landlords in relevant BID networking meetings, events and forums, can ensure the business centre has the right mix of services that complement each other, can create synergies and generate additional foot traffic.

Promotion

Promotions are often the public face of a BID. They are a great way of improving visibility and awareness. A promotion can be an event, a retail promotion, a publication, a competition, business service or any way that is chosen to deliver the unique selling proposition of the BID to prospective customers. Promotion is part of the marketing plan.

Event Management

Events are a powerful tool for BIDs to truly engage their customers and leverage their brand. A successful event marketing campaign is one that:

- Meets the BID brand objectives
- Delivers a meaningful message directly to the target market
- Complements the overall marketing plan
- Provides a talking point amongst customers

Website Development

The world wide web offers a new way of interactive marketing. A well-designed, content rich website will broadcast ideas and BID point of view to your potential customers and provide them with relevant information about your products and services.



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Placemaking

Placemaking has increasingly become more important in the creation of liveable, people friendly, walkable, resilient and beautiful places. It provides a powerful set of tools, integrated thinking and practice to catalyse social sustainability and re-localisation. Placemaking is a practical framework to revitalise and renew both new and existing communities. It provides a new story and approach to dealing with the current economic and environmental challenges we are facing.

For more information and international case studies, please see:

<http://www.pps.org>

<http://www.villagewell.org>

Business Development Initiatives

Business Expansion and Retention (BEAR) Programme

One characteristic of a vibrant local 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
- acting as an attraction for outside businesses to relocate or establish within the community.

It is vital to have community initiatives that focus on listening to, and helping existing businesses to remain and grow within the local community. The Business Expansion and Retention (BEAR) programme is an excellent tool and resource for achieving this.

Programme Description

The BEAR programme is simply a community wide dialogue with owners and operators of local businesses about what helps and hinders their community activities, and what ideas they have to improve the local business environment. It involves the mobilization and training of local community volunteers who visit local businesses and engage in conversation through the use of a structured questionnaire. The information generated through those conversations then becomes the basis for invaluable community response to any requests for assistance by businesses and the design and implementation of community and economic development strategies.

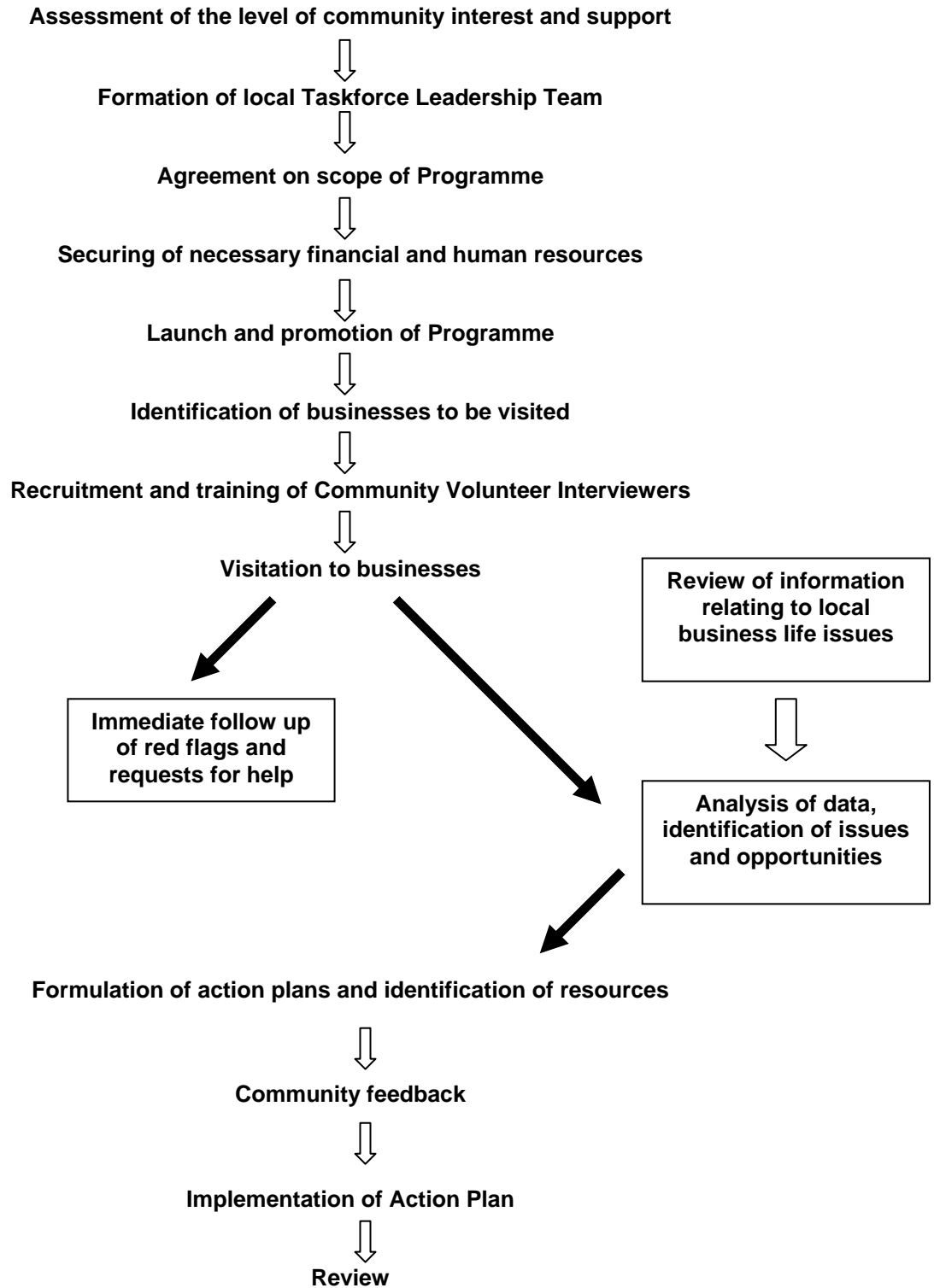
The flow diagram on the following page summarises the steps of what is generally a 3-6 month process.



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The B.E.A.R programme Process (3 – 6 months):





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Potential of the B.E.A.R. Program

The BEAR programme 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 this community and their reasons
- Perceptions about government actions and what helps and hinders
- Opportunities for matchmaking and collaboration between local businesses
- Current and future labour market needs
- Small businesses training and information needs
- Opportunities for collaboration between businesses and community and civic groups
- New ideas for improving the local economy and the business environment
- New volunteers and community leadership

For more information:

Contact Peter Kenyon, Director, Bank of I.D.E.A.S.

Phone: 08 6293 1848 Mobile: 0417 183 719

Email: pk@bankofideas.com.au

Website: <http://www.bankofideas.com.au/>

Business Centre Audit

All business centres have weaknesses as well as strengths. To sustain and grow the business centre, it is vital to address these issues before they threaten the chances of long-term success. A business centre audit can be a key part of that process. The aim is to identify opportunities to improve the role, function and effectiveness of the business centre.

Key objectives

BIDs should seek to identify:

- Key performance improvement opportunities
- Strengths and weaknesses and appropriate actions
- Conflicts between the BID strategic plan and present implementation
- Other aspects that will improve effectiveness, function and economic growth of the business centre
- New projects/initiatives for implementation
- Partnership opportunities
- Sources of information or assistance

BIDS can facilitate these business centre audits by consultants or their own peers, students or community volunteers.

Process

The process covers three phases:



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- **Data gathering:** Research, surveys, review of records, strategic and business plan, interview of staff, observation of processes and operation, assessment of built environment, intercept interviews, measurement of KPI's
- **Analysis:** Detailed analysis of data may include; collation and interpretation of survey results, economic or demographic analysis, SWOT
- **Presentation of results:** Verbal presentation backed up by a written assessment report explaining the process, giving a summary of the results, and providing recommendations

The business centre audit can be specifically targeted to tackle a single area of the business centre or a restricted range of topics. Such an approach will allow the analysts to delve deeper into pre-identified issues and hence provide a much more detailed review.

Firm-level business health check

Free business health checks are offered by BIZ (Business Information Zone); www.bizhealth.co.nz

This online survey is aimed at businesses, but can also be used by BIDs to check their internal processes are in order.

A business health check may include:

- People, management and culture
- Resources
- Innovation, ideas & information technology
- Marketing & sales
- Operations & systems

Business-to-Business Networks

Networking is a key tool in encouraging business growth. It allows businesses to meet with like-minded companies and discover areas of mutual interest, or exchange ideas about common opportunities.

Networking events provide an opportunity to engage BID members, allow them to present their company and its services and to leverage their brand.

Business networking forms the basis of business relationships. Small businesses rely heavily upon effective networking practices to win investors, customers and partners. Large businesses are able to identify alliances, potential customers or suppliers, and investment opportunities.

Every business community will contain a mix of established companies and new entrants. Likewise, there will be a mix of highly experienced and newer business owners. Both these groups have a lot to learn from each other. Start-up companies often bring a more flexible and nimble approach and established businesses have a wealth of experience in governance, systems and processes.

A strong business network will support informal business mentoring and trade relationships.

A successful business-to-business networking campaign is one that:

- Meets the BID's branding objectives, and compliments the overall marketing plan
- Allows members to mix and exchange ideas
- Increases the profile of the BID and individual members
- Delivers a meaningful message directly



Find out more: phone 379 2020 or visit www.aucklandcity.govt.nz

- Provides a talking point amongst members and their customers

Consider the following facts before running networking events:

- Objectives of the event
- Tangible changes expected, e.g. increase in contacts, sales, attract investors and/or customers
- Measure results against marketing objectives
- Targets achieved

Business and Service Mix

Guidelines on Preparing a Prospectus

Publishing a prospectus is a professional way to attract new business, investment or new development (commercial or residential) to a town centre or business district. The prospectus should provide an economic profile of the area and demonstrate an understanding of the environment in which businesses operate. It is a useful tool in selling the positive benefits of locating a business or investment opportunity in the BID.

Ideally, the Prospectus should include:

- Introduction to the area – including a location map
- Information on the BID association, and services and opportunities offered to the business community
- BID Strategic plan and annual business plan
- Manager's business card
- A profile of the local community and its demographic make-up, including
 - population characteristics (demographics) such as age, gender, ethnicity.
- Economic data
 - employment and occupation information and trends
 - educational attainment of local population
- Business mix – retail, professional, industrial, hospitality and business services
- Business statistics
 - Business growth / turnover statistics, pedestrian surveys, business occupancy levels and customer / visitor growth
- Property attributes, market data and trends:
 - commercial rents
 - total floor space
 - gross square metres
- Social and cultural infrastructure, such as schools, universities, hospitals, libraries, art galleries and broadband
 - Other attractions; tourist destinations, entertainment hubs, restaurants and ethnic food outlets, markets, seasonal festivals, sporting events, venues
- Residential trends
- Transport linkages; public transport services, accessibility by road



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Landlord Engagement

Landlords can help accomplish the BID objectives and build a sustainable and vibrant community. The role of the landlord is to:

- Protect capital values
- Contribute to the business mix strategy/criteria
- Provide well-maintained and managed property
- Provide appropriate security of tenure

Engaging property owners in relevant BID networking meetings, events, forums, can ensure the business centre has the right mix of services that complement each other, create synergies and generate additional foot traffic.

Customers are attracted to businesses that are visually pleasing both inside and out. When fitting-out new premises, businesses should think about the visual impact of their shop in relation to the overall environment.

There are both external and internal factors that influence the growth of the business centre. External factors include building upkeep and presentation, painting, signage, awning and shop front design.

BIDs should encourage and influence landlords to :

- Maintain external design and visual appeal of the building in context with the streetscape
- Undertake ongoing maintenance
- Employ sound property management expertise and processes

Additional Information

Install Law Limited is a New Zealand company that offers legal advice on how to enter into a commercial lease – this information can be accessed from their website:

http://www.howtolaw.co.nz/contents_property2.asp?location=AK

Guide to taking a lease document is developed by NZ Retailers Association (NZRA). This document provides with some explanatory comments and general advice on the Auckland District Law Society Lease, a format widely used in New Zealand. For further information or assistance, refer to NZRA website:

<http://www.retail.org.nz>

Website Development

The world wide web presents a new way of interactive marketing. A well-designed, content rich website will broadcast ideas and the point of view to BID potential customers and provide them with relevant information about products and services.

Website planning and page creation needs to consider flexibility. There are recognised standards for making web sites including standards for the HTML coding, cascading style sheets, accessibility, usability and even the wording you use and the way visitors navigate around the site. Meeting those standards will also go a long way towards making it easy for search engines to list your web site thus making it easier for visitors to find you.

In New Zealand we should be aware of the [Government Web Guidelines](http://www.e.govt.nz/standards/web-guidelines/)



Find out more: phone 379 2020 or visit www.aucklandcity.govt.nz

The menu of possible web applications is ever expanding and includes:

- Membership development
- Fundraising
- Advocacy campaigns
- Getting feedback on programmes and services
- Publicising an event
- Sharing best practices
- Updating mailing lists
- Managing collaborations
- Highlighting successes
- Building awareness around an issue
- Displaying community assets through the use of online mapping
- Providing public access to searchable databases
- Cost effective distribution of newsletters and other publications
- Marketing fee-based services
- Building support through multimedia storytelling
- Enhancing media relationships

Best practices for creating the virtual marketing tool

- Know what the BID wants before designing the site
- Define the audience - think expansively
- Develop a wish list of web features
- Identify synergies with existing or proposed content, internet tools and communication strategies
- Evaluate the administrative implications of each feature
- Get a handle on the technology challenges and cost factors
- Design the web site from the perspective of key audience; not the organisation. What information will they be looking for? What resources will attract their eye and motivate them to click through different sections of your site? Make sure the "gems" are easily accessible from your home page and not buried three clicks deep.
- Label the various sections clearly and accurately. Make the website as interactive as possible. This exercise is not only useful for the web site; it can provide the BID with a new perspective on marketing the organisation as well.
- Understand the unique way that people navigate the web.
- Keep focused on the BID vision
- Keep the website content fresh

Measures

- **Traffic** - Consider how many unique visitors your website attracts (in contrast to total visitors) and how big the community is. Bear in mind that these figures should be examined in the context of what the BID is trying to achieve and how these relate to alternative forms of marketing.



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- **Time spent** - Assess how long visitors spend in your virtual installation. This is important for measuring brand impact and converting buyers.
- **Interactions** - Analyze the type and number of interactions visitors have.
- **Ripple effects from other media** - This includes the number of people who interact with your marketing in a secondary environment, such as blogs, Flickr, and YouTube.
- **Input** - For those with a market-research-related goal, the volume and quality of participant feedback can be critical to gaining insight on target users.

Promotion

Promotions are often the public face of a BID. They are a great way of improving visibility and awareness. A promotion can be an event, a retail promotion, a publication, a competition, a business service or any way that is chosen to deliver the unique selling proposition of the BID to prospective customers.

Promotion is part of the marketing plan. Once the unique selling proposition is identified, then work on promotion possibilities and include them in the marketing plan.

- Advertising – choose the most effective media to reach the target audience, e.g. internet, website, radio, television, newspapers, magazines, billboards, direct mail Marketing materials – brochures, pamphlets, business card
- Publicity – special events including stakeholder involvement, newspaper articles, media releases
- Website

Key elements of promotion

- **Timing** - generally speaking, a BID should aim to run retail promotions at times when business is traditionally good
- **Objectives** - each promotion should have clear objectives for both the participants and the supporting businesses and organisations.
- **Developing a promotion** - a promotion should be designed to fit a particular type of community. The marketing plan will help evaluate whether promotional ideas are on track.
- **Resources** - once the promotion is developed, budget and resources need to be identified and incorporated in the budget along with projections on targets these promotions will bring in for the BID.

Types of promotion

- Business openings
- Retail promotions
- Market days
- Art and cultural events
- Holidays, festivals and seasonal sales
- Food and entertainment
- Christmas/Easter/Mother's day
- Business-to-business networking



Find out more: phone 379 2020 or visit www.aucklandcity.govt.nz

Events Management

Events are a powerful tool for BIDs to truly engage their customers and leverage their brand. A successful event marketing campaign is one that:

- Meets the BID brand objectives
- Delivers a meaningful message directly to the target market
- Complements the overall marketing plan
- Provides a talking point amongst consumers

Event management tools

- **Strategy** - Choosing the right event strategy for the programme and services requires a thorough understanding of the brand objectives.
- **Event outcome** - Clarity and agreement around event outcome is essential.
- **Target market** - Understanding your audience is a good first step in the event planning process.
- **Message** - A clear message is critical to the success of any event. Knowing exactly what you want to say is extremely important. Consistency is key and your message needs to be included in each step from the event invitation to web marketing campaign, to the event itself, the marketing collateral and the carefully planned post event strategy.
- **Brand positioning** - A good understanding of your brand position is crucial in building an event strategy. Your brand position will assist in clarifying the best type of event your BID needs and the most appropriate communication vehicle to engage your audience.
- **Creative** - The creative development of the event can vary enormously. Considering the questions above will point you in the right direction to as to what kind of event will provide the most powerful result.
- **Planning** - is crucial to any event no matter how small and intimate it may be. Critical paths, risk assessments, measurable results, budget control are essential tools when planning a successful outcome.
- **Implementation** - With the correct planning, the implementation of an event is the easy part.
- **Outcome** - The results of the event should be measurable. Events are all about building strong long-term partnerships with your prospects and customers.

Council's role

Auckland City Council is involved in many events and film shoots each year and can take a number of roles: facilitator, communicator and promoter, sponsor, provider or leader. All events should be planned to meet the overall council's vision of wanting Auckland recognised as an internationally competitive events city. For more information and help, please use this link:

<http://citynet.aucklandcity.govt.nz/citynet/organisation/groups/city/default.html#key>

Welcome Pack

A welcome pack provides a point of contact between the BID association and new businesses moving into the area or taking over an existing business. It will provide an important knowledge base on how the business community operates, set out minimum operating standards and can attract the interest and participation from new business people from the commencement of their business.

Ideally, welcome packs should include:



Find out more: phone 379 2020 or visit www.aucklandcity.govt.nz

- An introduction letter in different languages about the BID, its structure and services offered.
- Meetings, networking and training opportunities available
- Executive board member contacts, including the local councillor and community board member contacts.
- BID Strategic plan and annual business plan
- Calendar of planned events and future promotional opportunities
- Information on the demographic makeup of the local community
- Information on the economic performance of the Auckland region; including retail statistics, economic trends, challenges, visitor growth etc.
- Recommended hours of trade
- Rates and property information
- Rubbish and recycling information
- Subscribe to Auckland City Council e-newsletter - <http://www.aucklandcity.tx.co.nz/go/to/subscribe>
- Latest BID newsletter/e-news
- Local Police station/Community Constable contact

Useful contacts e.g.

- Auckland City Council - www.aucklandcity.govt.nz
- Department of Labour – www.dol.govt.nz
- NZ Retail Association – www.retail.org.nz
- NZ Manufacturers and Exporters Association – www.mea.org.nz
- Employers and manufacturers association – www.ema.co.nz
- IRD – www.ird.govt.nz
- Help to start, manage and grow business - contact BIZ 0800 424 946 or www.business.govt.nz
- Renting a property. Tips for residential renters - find out about your rights and responsibilities as tenants, and get advice on how to avoid problems and sort them out when they do come up. <http://www.dbh.govt.nz/tenants-index>
- Market rent by region – See what the market rate rent is in your suburb - <http://www.tenancy.govt.nz/market-rent>
- Install Law Limited is a New Zealand company that offers legal advice on how to enter into a commercial lease – this information can be accessed from their website http://www.howtolaw.co.nz/contents_property2.asp?location=AK
- Talk to New Zealand Retailers Association, Leasing and Property Advisor John Starr on 0800 472 472
- Business development – range of programmes and services offered by NZTE – visit website www.nzte.govt.nz or call 0800 555 888
- Free Business mentoring services funded by NZTE - Business Mentors NZ www.businessmentor.org.nz or phone 0800 103 400
- To develop business skills, Enterprise Training programme fully funded by NZTE and contracted to WHK Gosling Chapman website www.whkbusinessgrowth.com
- Useful contacts for business support organisation: <http://www.aucklandcity.govt.nz/auckland/economy/support/networks.asp>

