**West Virginia Food and Farm Coalition**

**WV Rural Grocer Network**

**Technical Assistance Assessment**

**Part 1. Introductory Checklist**

We are excited you are interested in receiving technical assistance! This will be critical to ensuring the sustainability of your business model and your ability to repay any equipment lease you might receive. As a first step, please complete this Introductory Checklist (about 45 minutes). This will help us to better understand your business model and needs. Please send this Checklist, along with any relevant documents, to Jess Toon with the WV Food & Farm Coalition at jtoon@wvfoodandfarm.org. She will review your responses and contact you to set-up further conversations and discuss your Technical Assistance requirements. Thank you for your help!

*- The WV Rural Grocer Network Team*

Grocer Name:

Contact Name, Phone & Email:

Date Completed:

1. Operations *(If your grocer is more of an idea than a reality at this point, suggest what you would do.)*

* Why do you (or want to) own/run a successful grocer?
* How long have you been in operation?
* What are your current major product departments? (For example: produce, frozen food, dry goods, meat & dairy products, home goods, etc.)
* How many employees do you have? (Include yourself!)
* Who are your key partners? Why are they so important to your success? (List up to 3.)

2. Marketing/ Messaging

* Who is your target customer?

Target customer: The specific customer segment(s) you seek to cater to.

* What is your value proposition to shoppers?

Value proposition: The value you bring customers *that they are willing to pay for.*

* How do you get the word out about your grocer project and attract new customers?
* Please attach any marketing/press materials you have (including social media pages).
* How many shoppers do you serve a week? A guesstimate is fine.
* List your top 3 competitors in the table below. Use the table to rate each of them (and your grocer) on quality, price, availability, variety, and accessibility.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Your Business | Competitor 1: (Insert Name Here) | Competitor 2: (Insert Name Here) | Competitor 3: (Insert Name Here) |
| Quality0 = Low Quality5 = High Quality  |  |  |  |  |
| Price0 = High Price5 = Low Price |  |  |  |  |
| Availability0 = Low Availability5 = Well-Stocked |  |  |  |  |
| Variety 0 = Low Variety5 = High Variety |  |  |  |  |
| Accessibility0 = Distant5 = Easily Accessible  |  |  |  |  |

3. Financials

* On a scale of 0-5 how comfortable you with the following activities:

Accounting/ Bookkeeping: Classifying business transactions into financial statements.



0 = No knowledge of this topic

5 = Extremely competent in this task

Financial Analysis & Management: Making decisions based on financial information.



0 = No knowledge of this topic

5 = Extremely competent in this task

* Please attach the following financial reports (*if available*):
	+ Profit & Loss Statement or Income Statement (for the last 2 years and this year currently)
	+ Sales Reports
	+ Balance Sheet (for the last 2 years and this year currently)
	+ Future Financial Projections
* Overall, do you have any additional thoughts/concerns?

**Thank you!**

You are doing important work: ensuring food availability and access in your community. A sustainable business model means your work will continue. We will review your responses and get back with you to set-up two phone conversations for a deeper dive. Following the calls, we will be able to develop and submit a detailed Plan of Action for your technical assistance.

*(To be completed by the WVFFC team)*

Date for follow-up Conversation #1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date for follow-up Conversation #2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_