



Triple Bottom-line Questionnaire

Instructions for Completion of the Triple Bottom-line Questionnaire

The UseWine project is a new project funded by the European Commission. The project aims to support small and medium sized enterprises (SMEs) within the wine sector, to develop approaches to sustainability through the use of the Triple Bottom Line (TBL).

Whilst businesses primarily focus on profit, sustainable organisations are committed to measuring and making key decisions based upon measures that take into account profitability, the planet and people (i.e. the three pillars that make up the TBL).

This tool has been designed to assess the current status of wine producers in relation to sustainability using TBL framework. The self-assessment questionnaire consists of 70 statements: you simply need to indicate if you agree or disagree with each statement. **If you agree with the statement, enter '1' and if you disagree with the statement enter '0'.**

Please ensure that you score all of the statements. When you have completed the questionnaire, save it and return it by e-mail to: <insert email address>

We will produce your UseWine Self-Assessment Report and send you a copy. The report will include an explanation of your self-assessment and highlight actions you might like to consider to further develop your organisation's sustainability plans.

Once we have completed this phase of the research, we will also send you a complimentary copy of the research report including a summary of the results for wine producers in France, Cyprus, Spain, Portugal, Poland, the UK and Austria.

PLEASE BE ASSURED THAT YOUR ORGANISATION'S REPORT WILL NOT BE SHARED WITH ANYONE ELSE AND IS CONFIDENTIAL

If you have any questions please contact: <insert>

Thank you for your time and cooperation.



Erasmus+



Company Name: Exponential Training & Assessment Ltd

Date Completed: 30th September 2011

UseWine Triple Bottom-line Questionnaire

Pillar 1: Profit

Where you agree with a statement, enter 1. Where you disagree with a statement, enter 0.

Agree = 1
Disagree = 0

Strategy

1. We have a clear, well thought out written business plan
2. We are very clear where we want our business to be in three years from now
3. We prioritise profit growth and not just turnover growth
4. We are committed to running our business in an environment-friendly and sustainable way
5. We routinely review and up-date our performance against written business objectives

Finance

1. We have identified the resources we need to achieve our business objectives
2. We monitor our income and expenditure monthly against formal budgets
3. We have a cash flow forecast for both this year and next year
4. We regularly monitor the profitability of our products
5. If we had surplus cash, we know precisely how we would invest it in our business

Marketing & Sales

1. We routinely evaluate our strengths and weaknesses
2. We have evaluated the threats and opportunities facing our business within the past 12 months
3. We have a clear, well defined marketing strategy
4. We have reviewed and up-dated our customer database in the last 12 months
5. We have a website which is updated regularly (at least monthly)
6. We make use of social media tools to promote our business (e.g. Facebook, Pinterest)
7. We have a plan to increase our sales for next year
8. We have reviewed and up-dated our promotional materials within the past 24 months
9. We have spoken to our top ten customers in the last six months

Innovation & Improvement

1. We have clear, written plans for new the introduction of new products
2. We have a good understanding of our competitors strengths and weaknesses
3. We routinely look for new ideas for new products
4. We have successfully developed non wine based income streams (e.g. eco-tourism, wine tours, craft or food products/crops)
5. We constantly seek out ways to improve our products and performance

Pillar 2: People

Social Responsibility

1. We engage with and support local community-based activities and events
2. We support the local economy through the employment of local people
3. We host events at our vineyard/winery to engage the local community
4. We take into account the views of local people when taking decisions which might impact on the environment
5. We take our community and social responsibilities very seriously

People & Skills

1. Our employees understand where our business will be in three years' time
2. As owners/managers we take undertake training ourselves
3. We give credit to everyone who goes out of their way to improve the performance of our business
4. We give routinely give constructive feedback to all employees about their performance
5. We have written, well-defined job descriptions for all employees
6. We provide health and safety training to all staff
7. We have an effective employee induction programme (e.g. Roles and responsibilities, health and safety)
8. We regularly identify training needs (e.g. Legal, technical, management skills)
9. We have a health and safety policy that is appropriate to our business

Stakeholders

1. We fully understand our customers views on environmental issues
2. We promote our environmental and sustainability policies to customers
3. We understand how our environmental performance impacts on our business
4. We network with other local vineyards/wineries and business owners
5. We are members of one or more wine producers associations/bodies
6. We take time to communicate regularly with our key stakeholders
7. We maintain detailed, accurate records to aid traceability
8. We have a quality assurance process covering each step of the wine production process
9. We regularly evaluate the performance of our suppliers (e.g. logistics, packing, transport)

Pillar 3: Planet

Ecosystem Management

1. We know what waste we generate in all parts of our company
2. We routinely review and up-date our plans to reduce and to recycle waste
3. We routinely look for less environmentally damaging materials and processes
4. We dispose of all waste in an environmentally, sensitive manner
5. We operate a recycling policy covering all parts of our business
6. We use a variety of measures to monitor our impact on the environment
7. We have written environmental and sustainability policy
8. We are committed to protecting and conserving the local ecosystem
9. We have a documented waste management plan

Wine Production

1. We have a management plan to support the production of quality crops/wines
2. We routinely undertake sample analysis to improve the quality of crops/wines
3. We only undertake fertilisation/use of artificial ingredients/chemicals when and where absolutely necessary
4. We have invested in new wine production plant and equipment within the last 24 months
5. We use technology to monitor and improve production efficiency
6. We have a plan that helps us to maintain and improve the quality of supplies and natural resources
7. The quality of our crops/wines is controlled using cultural/mechanical methods rather than relying on the use of chemicals
8. We maintain a written record of all activities relating to the use of chemicals and preservatives
9. Chemicals are only used in the growing/production process when and where it is absolutely necessary

Resource Management

1. We have a written plan that specifying targets and actions for reducing our energy usage
2. When purchasing new plant and equipment we take into account energy efficiency
3. We have reviewed our energy usage in all aspects of our business (office, production, transport)
4. We are making increasing use of renewable sources of energy (e.g. solar, wind, bio fuels)
5. We routinely inspect taps, pipes, irrigation systems and other water fixtures for leakage





The UseWine Triple Bottom-line Report

Confidential Report prepared for:

Exponential Training & Assessment Ltd

Date: 30th September 2011





Triple Bottom-line Scorecard

Overall USEWINE TBL Score **0%**

Pillar	Pillar Score	Business Areas	Description - The business:	Current Status
Pillar 1: Profit	0%	Strategy	has a clear business strategy and plan which embraces sustainability	C
		Finance	plans and manages the financial resources needed to deliver the business plan	C
		Marketing and Sales	has a clear understanding of the market and how to market and promote its products	C
		Innovation and Improvement	actively seeks out opportunities for and promotes innovation and improvement	C
Pillar 2: People	0%	Social Responsibility	takes its social responsibility serious, routinely taking action to fulfil its obligations	C
		Skills and People	supports people and performance using a variety of human resource strategies	C
		Customers	is committed to and takes action to understand and to meet customer needs	C
Pillar 3: Planet	0%	Ecosystem Management	is committed to a set of strategies that minimise the impact of its activities on the ecosystem	C
		Production	embraces contemporary wine production methods whilst respecting traditional methods	C
		Resource Management	maximises the efficient use of its resources to deliver its business plans	C

Explanations:

USEWINE TBL Score:

Your Company's overall Triple Bottom-line score expressed as an overall percentage

Pillar Score:

Your Company's score for each pillar of the TBL expressed as a percentage

Business Issues:

The UseWine TBL tool analyses your Company in nine different areas of your business

Current Status:

Your Company has been graded in each business area based upon your answers to the questionnaire

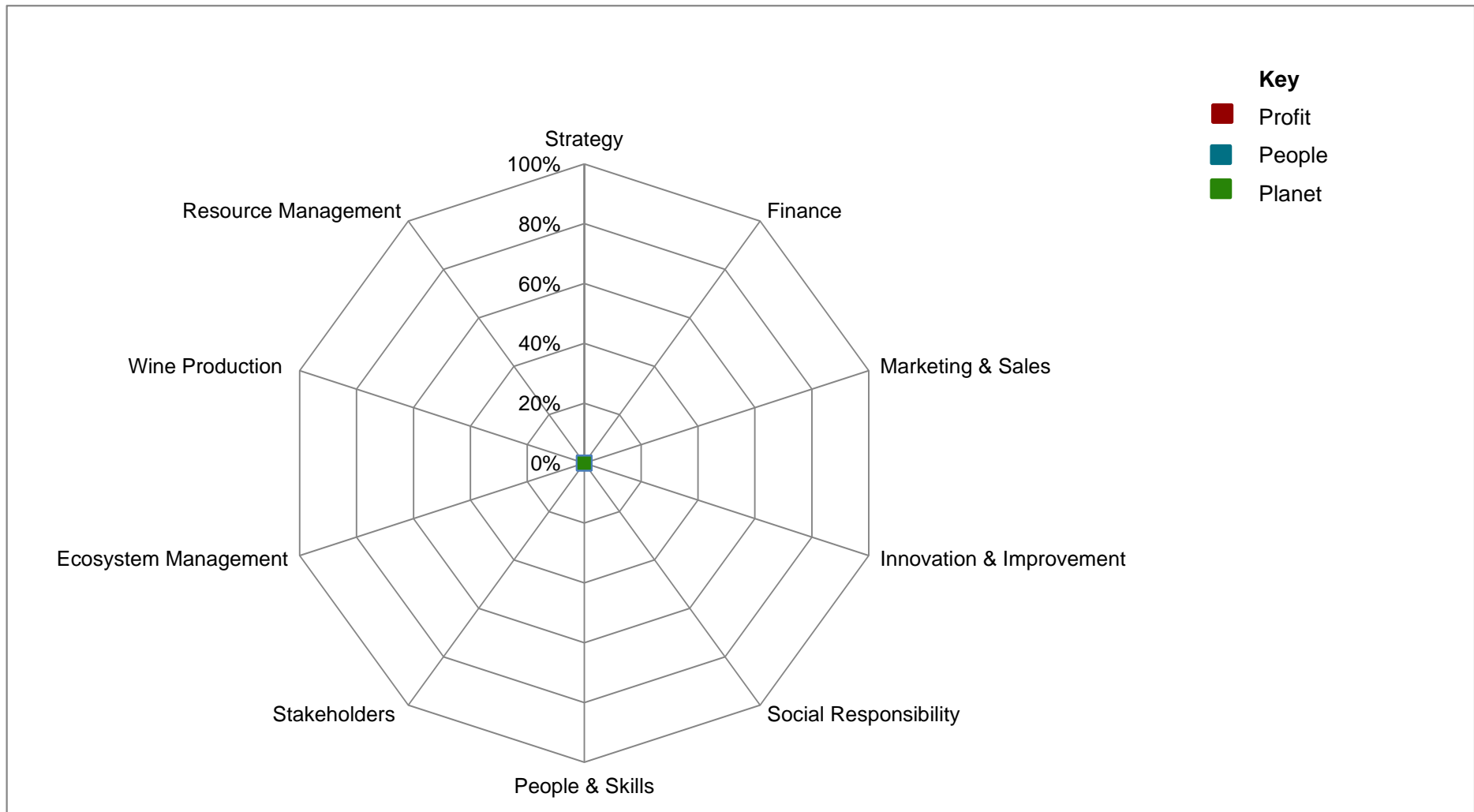
A suggests you are well on top of the issue and are working on plans to improve even further

B suggests you have something on which to build and recognise there is scope for improvement

C suggests that you acknowledge there is scope to introduce improvements

Triple Bottom-line Chart

Below is a graphic summary of your score for each of the Business Areas.



Pillar: Profit

Business Area: Strategy

USEWINE TBL Score:

C

Key characteristics of a Triple Bottom-line business:

- They know where they want to be in the next 3 – 5 years and have plans that support these aspirations
- They have a clear business strategy and plan which has been implemented consistently for at least 12 months
- They have a business plan which describes clear, well thought out plans and actions taking into account both profitability and turnover
- They have formally integrated sustainability and environmental-friendly practices into the business strategy which is reflected in the company’s mission, vision and company culture
- They share plans and strategies with all employees and with other stakeholders such as neighbours, customers and others, as appropriate
- They routinely review company performance against the business plan and implement changes, as necessary to achieve business objectives

Typical challenges facing A-rated businesses

- Creating a culture to support the company’s vision and business plan
- Making decisions based upon a set of performance measures
- Building on past and current success
- Up-dating plans to ensure profit and sales objectives are achieved
- Balancing business decisions with sustainability issues
- Maintaining the energy and momentum to drive plans forward

Typical challenges facing B-rated businesses

- Implementing the business plan
- Monitoring and up-dating business plan in light of performance
- Sharing plans with employees and others
- Gaining the commitment of others to your plans
- Leading and managing change projects
- Coping with resistance to change from managers and employees

Typical challenges facing C-rated businesses

- Recognising the value/potential of formalising plans
- Developing a clear medium/long term vision for the business
- Creating time for planning and writing a business plan
- Drafting a written business plan with clear strategies and actions
- Accepting the need for change and new business practices

Pillar: Profit

Business Area: Finance

USEWINE TBL Score:

C

Key challenges of Triple Bottom-line businesses:

- They have clearly defined, well-managed systems and procedures to manage finance and budgeting
- They have identified the resources that are necessary to support the implementation of the company's strategy and business plan
- They monitor income and expenditure against budgets enabling corrective actions to be implemented as required
- They plan and manage cash flow in the short term and the medium/longer term
- They know and monitor the profitability of different products and services and use this knowledge when making decisions
- They have a strategy for medium/longer term investment to develop and improve the performance of the business

Typical challenges facing A-rated businesses

- Preparing longer term investment plans
- Identifying potential funding sources to finance plans
- Refining and streamlining management information systems
- Monitoring financial trends and performance
- Fine-tuning operations based on timely and accurate data

Typical challenges facing B-rated businesses

- Making tough decisions based on financial considerations
- Taking corrective actions in light of financial performance
- Implementing a range of financial controls and reports
- Managing working capital to fund operations
- Having sufficient cash flow to fund the business plan

Typical challenges facing C-rated businesses

- Understanding finance and budgeting processes and concepts
- Preparing accurate and realistic budgets
- Analysing financial records to inform planning and decision-making
- Devising and implementing simple, practical and effective finance systems
- Preparing short and longer-term cash flow forecasts

Pillar: Profit

Business Area: Marketing & Sales

USEWINE TBL Score:

C

<p>Key challenges of Triple Bottom-line businesses:</p> <ul style="list-style-type: none"> • They have a strong understanding of their target market and have a clear plan of how to market and promote their business • They have considered their company’s internal strengths and weakness and external opportunities resulting in plans to exploit strengths and opportunities and to address weaknesses and potential threats • They have a clearly defined marketing strategy which utilises traditional and digital marketing and promotional tools • They have a clear company identity/brand which is reflected in all marketing resources including websites, leaflets and brochures • They have clearly defined plans to increase sales and routinely seek feedback from customers 	<p>Typical challenges facing A-rated businesses</p> <ul style="list-style-type: none"> • Undertaking market research to find and exploit new markets • Maximising the value of public relations opportunities • Building long-term relationships with partners and stakeholders • Up-dating the company brand and marketing resources • Implementing a strategy to further increase your company’s on-line presence
	<p>Typical challenges facing B-rated businesses</p> <ul style="list-style-type: none"> • Developing and promoting a strong company brand • Implementing and managing the marketing plan • Exploiting a database of prospects and customers • Getting regular feedback from customers • Showcasing products and sharing successes with customers • Using a wider range methods to market the business
	<p>Typical challenges facing C-rated businesses</p> <ul style="list-style-type: none"> • Defining company strengths and weaknesses • Understanding potential threats and opportunities • Preparing realistic sales plans • Creating a clear marketing plan and customer offering • Preparing cost-effective marketing and promotions resources • Understanding customer and market needs

Pillar: Profit

Business Area: Innovation & Improvement

USEWINE TBL Score:

C

Key challenges of Triple Bottom-line businesses:

- They constantly look for ways to improve business performance, to simplify systems and processes and to improve quality and efficiency
- They take time to understand how they can exploit new technology and market trends to develop and grow their business
- They look for opportunities to develop new income streams and to increase sales from existing income streams
- They have plans in place for the introduction of new products and services and to improve current products and services

Typical challenges of A-rated businesses

- Identifying and acting on emerging trends and opportunities
- Knowing how to improve productivity and efficiency
- Understanding how to develop and launch new products
- Making use of grants and partnerships to support innovation
- Planning 3 – 5 years into the future

Typical challenges facing B-rated businesses

- Reviewing and improving existing systems and process
- Identifying and eliminating bottlenecks and areas of waste
- Defining new and alternative income streams and new products
- Learning about new production methods and technologies
- Allocating time and resources to improvement and innovate
- Exploiting technologies to manage and support business performance

Typical challenges facing C-rated businesses

- Using customer feedback to make improvements to products and services
- Researching competitor products and service
- Making a list of problems and potential improvements and prioritise for action
- Identifying short term, quick win solutions
- Asking employees and others for their ideas and suggestions

Pillar: People

Business Area: Social Responsibility

USEWINE TBL Score:

C

Key challenges of Triple Bottom-line businesses:

- They take their social responsibilities seriously and are sensitive to the needs and opinions of neighbours and the local community
- They are proactive in investing time and resources to foster good relations with neighbours and the local/regional community
- They aim to promote a better understanding of their business, its operations and activities through a range of activities, promotion and communication methods
- They engage with and support local/regional community events and activities, local people and local businesses and organisations
- They take the views and opinions of the local/regional community into account when making decisions that might have an impact on the local/regional community

Typical challenges of A-rated businesses

- Encouraging the local/regional community to visit your site
- Lobbying and influencing local/regional community policies
- Supporting local/regional community initiatives and events
- Obtaining feedback on how your company is perceived in the community
- Maximising the value of building excellent relationships with the local/regional community

Typical challenges facing B-rated businesses

- Finding the time to network with and to meet with neighbours
- Engaging with and communicating regularly with the local/regional community
- Sharing your company's plans and actions with people especially where they impact upon them
- Finding ways to build relations with challenging neighbours
- Attracting people locally and regionally to fill job vacancies

Typical challenges facing C-rated businesses

- Recognising the importance of developing good relationships with the local/regional community
- Understanding the concerns and views of people from the local/regional community
- Engaging and consulting with the local/regional community on issues and decisions
- Understanding what it means to be a good neighbour

Pillar: People

Business Area: People & Skills

USEWINE TBL Score:

C

Key challenges of Triple Bottom-line businesses:

- They recognise, value and invest in the development and skills of the people within their business through the operation of a variety of human resource strategies
- They share their plans and vision of where the business will be in the future with employees and provide them with regular up-dates on progress
- They provide clear leadership and direction on what is expected of people, how they are performing and how to improve performance
- They provide a safe and healthy working environment for people ensuring they possess the knowledge and skills to fulfil their performance objectives safely and in-line with the company's sustainability policies and practices
- They ensure communication with people routinely and in a manner that supports and develops the company's culture and values

Typical challenges of A-rated businesses

- Being recognised as an 'investor in people'
- Developing a culture of performance and continuous improvement
- Implementing manpower successions plan
- Promoting people and giving them increased responsibilities
- Investing in your own personal, technical and professional development

Typical challenges facing B-rated businesses

- Undertaking people management responsibilities
- Preparing and implementing a manpower plan
- Using a range of management tools and techniques
- Managing motivation, performance and conflict
- Developing safe systems of work
- Devising and implementing effective human resource systems and processes

Typical challenges facing C-rated businesses

- Recognising the importance of valuing and developing people
- Understanding how to manage and lead teams and individuals
- Knowing how to define and meet training needs
- Awareness of health and safety legislation and requirements
- Accessing and participating in development oneself

Pillar: People

Business Area: Stakeholders

USEWINE TBL Score:

C

Key challenges of Triple Bottom-line businesses:

- They are committed to and take action to understand and where practically possible meet the needs of different stakeholder groups (e.g. customers, suppliers, the local/regional community and others)
- They take time to understand their customer's views and environmental issues and routinely seek feedback on the effectiveness of their policies and performance
- They work with other local/regional businesses, associations and representative bodies and community groups on environmental and sustainability issues
- They operate a quality assurance process covering all aspects of the business and take corrective action as required
- They evaluate the performance of suppliers and are committed to traceability and quality assurance

Typical challenges of A-rated businesses

- Implement a stakeholder management plan
- Influencing sector/industry and/or regional policy and initiatives
- Achieving national and internally recognised quality standards and awards
- Evaluating supplier performance and negotiating new agreements
- Improving the quality and performance of your supply chain
- Knowing how your environmental performance impacts on your business

Typical challenges facing B-rated businesses

- Preparing and implementing plans to meet stakeholder needs
- Communicating your environmental and sustainability objectives to customers
- Working with other local wine producers and industry/sector agencies/authorities
- Knowing how to set up a quality assurance system
- Managing the performance of suppliers

Typical challenges facing C-rated businesses

- Being interested in the opinions of people outside of the business
- Identifying the key stakeholders of the business
- Having time to network with others in your industry/sector
- Understanding the impact of your company on the environment
- Knowing your customers' views on environmental issues

Pillar: Planet

Business Area: Ecosystem Management

USEWINE TBL Score:

C

Key challenges of Triple Bottom-line businesses:

- They have written environmental and sustainability policies supported by a variety of plans and processes which minimise the impact of the business on the local/regional ecosystem
- They have clear documented waste management and recycling plans and take all practicable steps to operate their business in a sustainable way
- They routinely look for ways to increase efficiency and for less environmentally damaging materials and processes
- They use a variety of measures to monitor the impact of the business on the environment and are committed to protecting and conserving the local/regional ecosystem

Typical challenges of A-rated businesses

- Continuously seeking ways to minimise the impact of the business on the environment
- Adopting new and best environmental practices across the business
- Developing a culture that supports and promotes sustainability
- Identifying new strategies to reduce waste, increase recycling and to protect, sustain and improve the local ecosystem

Typical challenges facing B-rated businesses

- Documenting working practices and policies
- Finding ways of protecting and conserving the local ecosystem
- Introducing new plant, equipment and working practices
- Measuring and monitoring the impact of the business on the environment
- Changing long-standing habits and practices

Typical challenges facing C-rated businesses

- Understanding the impact of the business on the environment
- Awareness of sustainability and environmental issues and practices
- Preparing an environmental management plan
- Committing to change and adopting of new practices and working methods
- Engaging and motivating employees to embrace new working methods

Pillar: Planet

A342 **Business Area: Wine Production**

USEWINE TBL Score:

C

Key challenges of Triple Bottom-line businesses:

- They have management plans to support the growth of healthy vines/to increase the quality of wine
- They make use of and invest in modern processes and technologies as well as traditional methods to support wine production
- They routinely monitor the vineyard/winery for pests and disease and routinely undertake sample analysis to improve wine quality and crop yield
- They manage the growth of vines/production processes making use of organic/natural and mechanical means rather than relying solely on the use of chemicals

Typical challenges of A-rated businesses

- Development of a management information system to monitor trends and performance
- Making use of management information to support decision-making
- Identifying monetary and non-monetary benefits as a result of changes to production processes
- Sharing and reporting environmental performance with others both within and outside of the business
- Creating a long-term, sustainable wine business which generates a healthy profit, a quality product and respects the local/regional ecosystem

Typical challenges facing B-rated businesses

- Preparing and implementing plans to target/prioritise specific areas for improvement
- Devising and managing up-dated inspection and preventative practices and strategies
- Implementing a record system to report on action, progress and improvements
- Improving production, crop yield and productivity
- Making changes without placing a strain on the company's finances

Typical challenges facing C-rated businesses

- Reducing the dependency on the use of chemicals
- Understanding the latest methods and techniques for pest/disease management and preservation
- Investing in new plant and equipment
- Changing and/or updating traditional production methods
- Taking the time to evaluate current practices to identify areas for improvement

Pillar: Planet

Business Area: Resource Management

USEWINE TBL Score:

C

Key challenges of Triple Bottom-line businesses:

- They continually strive to maximise the efficient use of resources to deliver the company’s business plans and objectives
- They review energy usage in all aspects of the business and have a plan setting out targets and actions for monitoring and reducing energy usage
- They make use of renewable energy sources and take energy efficiency into account when purchasing new plant and equipment
- They have maintenance and inspection plans for all plant, machinery and equipment and inspect water and irrigation systems to eliminate leakage

Typical challenges of A-rated businesses

- Increasing the use of renewal energy sources
- Devising long-term plans to upgrade to energy efficient plant, and equipment and irrigation systems
- Monitoring energy used and driving down waste
- Networking with neighbours and others to share resources where practical

Typical challenges facing B-rated businesses

- Investing in more efficient plant, equipment and machinery
- Identifying and prioritising strategies to reduce energy usage
- Considering how alternative energy sources can be used
- Devising and implementing maintenance plans for all plant and equipment
- Setting up and using key performance metrics for energy usage

Typical challenges facing C-rated businesses

- Knowing what the energy usage is across all aspects of the business
- Understanding how to reduce energy consumption
- Learning about renewal energy sources
- Setting targets and actions for reducing energy usage

Setting Priorities Worksheet

Pillar	Pillar Score	Business Areas	Description - The business:	Status	Priority*
Profit	0%	Strategy	has a clear business strategy and plan which embraces sustainability	C	
		Finance	plans and manages the financial resources needed to deliver the business plan	C	
		Marketing and Sales	has a clear understanding of the market and how to market and promote its products	C	
		Innovation and Improvement	actively seeks out opportunities for and promotes innovation and improvement	C	
People	0%	Social Responsibility	takes its social responsibility serious, routinely taking action to fulfil its obligations	C	
		Skills and People	supports people and performance using a variety of human resource strategies	C	
		Stakeholders	is committed to and takes action to understand and to meet customer needs	C	
Planet	0%	Ecosystem Management	is committed to a set of strategies that minimise the impact of its activities on the ecosystem	C	
		Production	embraces contemporary wine production methods whilst respecting traditional methods	C	
		Resource Management	maximises the efficient use of its resources to deliver its business plans	C	

* Priority for action. Score each business area out of 10: 1 = Lowest priority, 10 = Highest priority

