

STRATEGIC PLANNING TOOLKIT FOR LOCAL ECONOMIC DEVELOPMENT IN B.C.



Version 1.0





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SELF-ASSESSMENT

DIRECTIONS

Complete the self-assessment below to determine which components you should include in your strategic planning process. If you already have a current version of a component, you don't need to include it in your workplan – just integrate it into your process. If you do not have one of the components, and are able to complete it, we recommend including all options. If you have limited capacity, we have starred (*) the components that should be highest priority.

Component	Description	Estimated time commitment	Already have?	Capacity/interest in completing?	Include in workplan?	Toolkit component
Basic statistics & information*	Gather key community info and stats to provide context for strategizing	60 min.	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Info and asset inventory
Asset inventory	List categorized assets to provide further context	60-90 min.	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Info and asset inventory
Summary of key facts (or community profile)	Develop a key facts document to summarize the most relevant information for planning purposes	30 min.	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Key facts template
Stakeholder list	List all stakeholders impacted by the process, as well as potential partners	30-45 min.	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Stakeholder and partner identification
Stakeholder engagement plan	Create a plan for engaging identified partners and stakeholders	30-45 min.	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Stakeholder and partner engagement; Stakeholder pull-out
Strategic assessment (i.e., SWOT or similar)*	Pinpoint the strengths, challenges and opportunities facing the community	60+ min., or individual conversations	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Strategic assessment
Vision for local economic development	Establish a vision to provide an ultimate goal that the strategy is working towards	30-60 min.	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Visioning

SELF-ASSESSMENT

Component	Description	Estimated time commitment	Already have?	Capacity/interest in completing?	Include in workplan?	Toolkit component
Strategic areas*	Identify the strategic areas or broad subjects to focus on (e.g., business retention & expansion; entrepreneurial development; downtown improvement)	30-60 min.	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Identifying strategic areas
Goals for strategic areas	Establish goals for each strategic area to focus the strategy	30-60 min.	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Strategic area goals
Prioritized action items*	Identify and prioritize specific action items to activate the plan	60-120 min.	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Translating into action; Prioritizing Activities
Strategic plan document*	Put it all together in a written plan to get everyone on the same page	60-90 min.	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Strategic plan template
One-page strategic plan overview	Create a one-page overview to help partners and stakeholders quickly and easily understand your plan	45-60 min.	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Plan on a page template
Implementation workplan*	Develop an implementation workplan to move from plan to action	60-90 min.	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Implementation and monitoring plan template
Measurement plan	Use performance measurement to determine if the activities are having the intended effect	90+ min.	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Monitoring and measurement; Performance measurement toolkit
Evaluation plan	Use evaluations to help ensure that the program is on track or to determine if adjustments should be made	30-60 min. for plan; varied for execution	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Evaluation; Evaluation plan template

SETTING THE STAGE

DESCRIPTION

Early, informal conversations about the community's economic context are essential. This list of reasons to undertake economic development planning will help you gather important feedback from multiple perspectives and to begin generating support for a strategic planning process.

RATIONALE

- Support and buy-in from key players and decision makers is essential to the process
- Opportunity to understand the general opinions and perceptions around LED and planning
- Opportunity to recruit for project team

LOGISTICS

- Duration:** as needed; brief conversations with key players
- Format:** informal conversations
- Key Players:** project lead
- Resources:** existing documentation (OCP, community profile, statistics, webpage); other relevant community data that will help make a case for undertaking a strategic planning process

OUTPUT

Consistent understanding of what process could or should entail; buy-in from key players; understanding of perspectives of multiple stakeholder types.

PROCESS

1. Review the “Why undertake strategic planning” principles on the following page.
2. Develop a few-sentence overview that captures why you feel embarking on a strategic planning exercise for your community is important and timely. Try to link back to tangibles such as funding applications, or direct results such efforts may have on the community.
3. Have brief, informal meetings with the key players whose support would be integral to the success of the process. This could include: council members, local government staff, local business representatives, prominent local organizations – many of whom may make up the project team.
4. Discuss:
 - What this planning process could look like – how long, how much, to what end?
 - What challenges and opportunities does the person anticipate throughout the process?
 - Initial thoughts on the direction it could go, who would need to be involved, and how to get everyone on the same page.
 - Be sure to discuss their perspective on the local economy: what's going well, what could use improvement, and where they feel efforts should be focused.





WHY UNDERTAKE LED STRATEGIC PLANNING?

Why is this important?

- Highlight the impetus for planning in your local area. Be sure to review any plans that exist already, and have some research including local stats, trends and issues ready to share
- A plan makes a difference: 75% of communities who have a plan agree it is effective¹
- A plan allows communities to be responsive to funding opportunities (which often have very tight timelines to apply) – it is like writing a proposal for your community
- A plan helps make things happen: it coordinates efforts and creates connections and partnerships (gives you a roadmap)
- A plan gets past the talking (everyone is rowing in the same direction, deadlines, commitment)
- It helps keep track of what you are doing and if it is making a difference
- It is essential for marketing your community and attracting investment – investors are looking for a clear, targeted plan
- Many funding applications require that requests link back to a strategic plan

What needs to happen?

- You need to get essential support, get a fresh plan in place, identify what can be done now (e.g., what are three quick starts) and what needs to be done over the longer term (e.g., upgrade the harbour)

¹ According to the findings of the [2016 Local Economic Development in B.C. survey](#).

- The project team will customize a consultation and planning process that makes sense for the community's context and capacity

TIPS

- Follow your local processes for initiation – the first step is often getting internal stakeholders on board, particularly council
- The first step is to gain buy-in from board members, if applicable, and develop a good understanding of the board's desired outcomes from the process
- Discuss with the council and/or board members if it's appropriate to establish a committee, and if so, who should be involved

KEYS TO SUCCESS

DESCRIPTION

This simple checklist allows the project lead to decide whether to proceed with strategic planning, as well as the opportunity to red-flag any potential issues at the outset.

RATIONALE

- Provides a checkpoint to reflect on the potential for success in the planning process
- Allows any major red flags to be addressed before proceeding, or at least to be kept in mind as the process is designed

LOGISTICS

- Duration:** 15-20 minutes (may be somewhat longer if discussion)
- Format:** individual self-assessment, or brief conversation
- Key Players:** project lead, with one or two additional key players if necessary
- Resources:** historical understanding of the local economy, as well as the dynamics at play in similar past initiatives; conversation notes from initial 'setting the stage' phase

OUTPUT

Decision on whether to proceed with strategic planning, as well as understanding of potential red flags that may impede the process.

PROCESS

1. Review the "Keys to Success" checklist on the following page.
2. For the items you do not answer "Yes" to, consider or discuss how this element may affect the planning process.
3. Once checklist is complete, evaluate the extent to which you satisfy these foundational requirements.
4. Evaluate if any "No" responses will provide a serious enough impediment to delay the strategic planning for the time being.
5. If deciding to proceed, evaluate how the "red flag" responses will be managed during the planning process.





CHECKLIST

	Yes	Maybe	No
1. Is creating a plan seen as both necessary and useful by the key stakeholders?			
2. Is it likely that the process will be seen as legitimate, fair and transparent?			
3. Is there support for engagement or can it be generated?			
4. Are council and/or other community leaders and decision makers on board?			
5. Are there credible stakeholder representatives that will participate?			
6. Are key stakeholders ready to collaborate and work together?			
7. Are there local champions to keep things moving forward?			
8. Is there someone to manage and facilitate the planning, implementation and monitoring processes?			

COMMON BARRIERS TO SUCCESS

Pushback against strategic planning can take on many forms, for many reasons. A few of the most common are outlined in this list – consider how you will address these concerns as you continue your consultation and planning process.

- Perception that plans just sit on the shelf and gather dust
- Might raise unrealistic expectations in the community
- It will cost too much to implement- we don't have the resources
- Been there done that – we had a plan a few years back and nothing came out of it
- It's not our role as local government to work on economic development
- We aren't interested in growth/change

BUILDING THE PROJECT TEAM

DESCRIPTION

The project team or committee is the core group of people who plan and direct each stage of the strategic process. There should be one project lead who coordinates and organizes the efforts, and then a few other members who communicate regularly.

RATIONALE

- Provides focus, direction and consistency to the efforts
- Allows for diverse opinions to be represented and work to be distributed
- Generates buy-in and advocacy from the outset

LOGISTICS

- Duration:** 20-30 minutes (may be somewhat longer if discussion)
- Format:** individual self-assessment, or brief conversation
- Key Players:** project lead, with one or two additional key players if necessary
- Resources:** historical understanding of LED in the community, as well as the dynamics at play in similar past initiatives

OUTPUT

Project team established, with roles and responsibilities clearly outlined in a simple Terms of Reference.

PROCESS

1. From the initial discussions, the project lead should have a good idea of who should comprise the project team. This could include a local government task force, elected officials, a key member of the local business community, NGOs, major employers and/or a private citizen representative.
2. Establish who will comprise the project team, based on the approach that makes sense for your community. For example, it could be arranged internally, a committee could be appointed or recruited for, or you could host a general meeting to gauge interest and discuss as a group.
3. Draft a Terms of Reference for the group (see following page) so that potential members are clear on what the process and their role may entail. Adjust based on feedback, and finalize project team members once everyone is clear on general expectations of participation.
4. Hold the first project team meeting; discuss draft terms of reference. Go through the [Self-Assessment](#) process and determine the scope of the planning process you plan to undertake.





TERMS OF REFERENCE - OVERVIEW OF SECTIONS

A Terms of Reference document can be very helpful when establishing a committee or project group to ensure that all members are aware of the scope of their participation in the group, what will be required and how it will operate. The following list provides an overview of suggested sections for the Terms of Reference; see [Word Template](#) for an easily fillable version. Potential sections include:

Purpose of group

What is the broad purpose or role of the group? Who was it established by – when and why? What are the overall aims of the group?

Responsibilities

Broadly, what is the role of the group? Begin with “The Committee will...” and list the function the committee will serve, including the actions and deliverables that will be produced (generally). Also provide some context as to who will be overseeing or funding the group, and what their role is.

Membership

Describe the types of members that the group will consist of, with a rationale for their inclusion. Describe the ways in which members are committing to participate. Is it voluntary? Compensated? Address whether membership is open/closed, or if there are any restrictions on composition; also briefly describe how members were recruited. Indicate the overall term of membership, and if the group has a definitive cycle or end period.

Governance

Describe who will oversee and chair the group/committee, and what decision-making techniques will be employed (such as voting, chair’s authority, council approval, etc.).

Meetings

Describe expected meeting frequency and location, and approximate duration. What will the format(s) of the meetings be (e.g., in-person, virtual, teleconference)? Who will organize, chair and set the agenda for the meetings? Will minutes be kept? By whom? Will they be made public?

Resources

What resources or support will the group have access to? Will the supporting organization cover costs associated with travel, meeting space, accommodation, food, etc.? Are members accountable for reporting back to or consulting their respective organizations?

Conflict of Interest and Confidentiality

If applicable, directly address how potential conflicts of interest will be handled, and confidential materials and matters dealt with.

TIPS

Questions to address at the first meeting:

- What economic development work has been done already?
- Are there other plans that address economic development (e.g., OCP)?
- Are there past or current economic development plans? Are they in use?
- How much time, funding and capacity is available to invest in this process?
- What external support is needed, if any (e.g., consultant, regional manager)?
- What has worked well, or not, in the past for planning or executing economic development?

TERMS OF REFERENCE

PURPOSE OF GROUP

- What is the broad purpose or role of the group?
- Who was it established by – when and why?
- The overall goals of the group are to:
 - *List*

RESPONSIBILITIES

The Committee will:

- List the function the committee will serve
- Include the actions and deliverables that will be produced (generally)

MEMBERSHIP

- Describe the types of members that the group will consist of, with a rationale for their inclusion
- Describe the ways in which members are committing to participate. Is it voluntary? Compensated? Address whether membership is open/closed, or if there are any restrictions on composition; also briefly describe how members were recruited
- Indicate the overall term of membership, and if the group has a definitive cycle or end period

GOVERNANCE

- Describe who will oversee and chair the group
- What decision-making techniques will be employed (such as voting, chair's authority, council approval, etc.)?
- Include any other relevant details about overseeing the group's activities or how the internal structure will operate

MEETINGS

- Describe expected meeting frequency and location, and approximate duration.
- What will the format(s) of the meetings be (e.g., in-person, virtual, teleconference)?
- Who will organize, chair and set the agenda for the meetings?
- Will minutes be kept? By whom? Will they be made public?

RESOURCES

- What resources or support with the group have access to?
- Will the supporting organization cover costs associated with travel, meeting space, accommodation, food, etc?
- Are members accountable for reporting back to or consulting their respective organizations?

TERMS OF REFERENCE

CONFLICT OF INTEREST AND CONFIDENTIALITY

- If applicable, directly address how potential conflicts of interest will be handled, and confidential materials and matters dealt with

CUSTOMIZED WORKPLAN

DIRECTIONS

After completing the self-assessment and choosing which of the components to include in your process, complete a workplan below to organize your approach. All rows of potential components are included – delete any that aren't being included in your workplan. Adjust the description and estimated time commitment as desired, and copy the table into Excel if you prefer a sortable format.

	Action	Estimated time commitment	Responsibility	Method	Timing	Notes/Status
Basic stats & information	Gather key community info and stats that will provide context for strategizing	60 min.	<i>Name the key individuals involved</i>	<i>Briefly describe how you will undertake this action</i>	<i>Provide dates/times and milestones</i>	<i>Space for notes or status updates</i>
Asset inventory	Generate list of categorized assets to provide further context	60-90 min.				
Community profile or summary of key facts	Build a key facts document to summarize the most relevant information for planning purposes	30 min. (plus above two components)				
Stakeholder list	List all stakeholders that will be impacted by the process, as well as potential partners	30-45 min.				
Stakeholder engagement plan	Develop a plan for engaging the identified partners and stakeholders	30-45 min.				

CUSTOMIZED WORKPLAN

	Action	Estimated time commitment	Responsibility	Method	Timing	Notes/Status
Strategic Assessment (i.e., SWOT or similar)	Pinpoint the strengths, challenges and opportunities facing a community is crucial in the strategic process	60+ min., or individual conversations				
Vision for local economic development	Generate a vision to provide an ultimate goal that the strategy is working towards	30-60 min.				
Program areas for development work	Identify the program areas or broad subjects to focus on	30-60 min.				
Overall goals for program areas	Establish goals for each program area to focus the strategizing phase	30-60 min.				
Strategies for program areas	Develop strategies to move the plan to action, pinpointing what will be concentrated on.	90-120 min.				
Prioritized action items	Identify and prioritize specific action items	60-120 min.				
Strategic plan document	Compose a written plan to get everyone get on the same page	60-90 min.				

CUSTOMIZED WORKPLAN

	Action	Estimated time commitment	Responsibility	Method	Timing	Notes/Status
One-page strategic plan overview	Generate a one-page overview for ease of understanding the plan	45-60 min.				
Implementation workplan	Build an implementation workplan to move from plan to action	60-90 min.				
Monitoring plan	Develop a monitoring plan to report on progress and status	45 min. to establish; periodic after				
Measurement plan	Develop a performance measurement framework to determine if the activities are having the intended effect	90+ min.				
Evaluation plan	Develop an evaluation plan to see if the program is on track or determine if adjustments should be made	30-60 min. for plan; varied for execution				

Last updated: *date*

ABOUT US: KEY INFO AND ASSET INVENTORY

DESCRIPTION

In order to identify which economic activities make the most sense for your community, it's important to have a good understanding of your current context through gathering key information and mapping your assets.

RATIONALE

- Assists in strategic objective setting keeping priorities realistic and focused
- Helps with marketing, investment attraction, funding applications, creating new partnerships and identifying opportunities

LOGISTICS

Duration: as needed for info gathering; 60-90 minutes for asset inventory

Format: data gathering by project lead, individual or small group discussion for inventory

Key Players: primarily project lead; could also involve other team members

Resources: existing documentation (OCP, community profile, statistics, webpage); BC Stats, Statistics Canada and other info sources; community asset inventory if it exists

OUTPUT

A reference sheet of key community information and statistics, as well as a categorized asset inventory.

PROCESS

1. **Work with what you have:** look first to your OCP, community profile and other informational/strategic sources– you can quickly start populating your list based on whatever work has been done in the past.
2. **Know your facts:** before embarking on asset mapping, ensure that you have some of the basic statistics easily available (ideally in one snapshot) for your community. This should include: population (current, historic and projected), age distribution and trends, educational distribution, median household income and employment rates at the minimum, and any business data your community collects.
3. **List your assets:** once you've got your essential stats at hand, you'll want to move on to brainstorming assets under the categories described below. This could consist of the economic lead taking an hour or two to get a working list down, or involve a more collaborative brainstorming meeting with the council, project team or community stakeholders. Use the asset categories and descriptions on the following page, in conjunction with the inventory template, to generate a list for your community that highlights everything that could be considered an asset. Capture this overview in the [Key Facts Template](#).



ABOUT US: KEY INFO AND ASSET INVENTORY



ASSET CATEGORIES

Asset Category	Description	Examples
Physical infrastructure	This is what often springs to mind when considering asset inventories. List the physical infrastructure in your community that has the most significant economic impact.	<ul style="list-style-type: none"> • Transportation infrastructure • Utilities • Community facilities and housing • Information systems, connectivity
Economic land assets	Consider the non-privately owned land in the area, as well as zoning, availability and general costs. These lands are those that could be used directly for economic gain (e.g., development or resource extraction).	<ul style="list-style-type: none"> • Agricultural lands • Natural resources (energy, forests, mining, water) • Industrial land • Vacant land
Natural assets	These are assets that are intended to be kept in their natural state and not used for direct economic/development purposes.	<ul style="list-style-type: none"> • Bodies of water (lakes, rivers, ponds, streams) • Forests • Parks and recreation areas
Local institutions	This “influencers” category consists of institutions that provide governance, education or leadership in your community. This includes political assets.	<ul style="list-style-type: none"> • Educational • Political and governing bodies • Religious • Other Associations
Economic drivers	This broad group characterizes any organization involved in the production, distribution and consumption of goods and services in a community. Focus on your key and emerging economic drivers.	<ul style="list-style-type: none"> • Industry • Businesses • NGOs and non-profits • Public sector employment
Historical and cultural features	These encompass unique aspects of your community that serve as part of its identity and/or as a draw for visitors, residents or businesses.	<ul style="list-style-type: none"> • Landmarks • Tourism draws • Historical sites • Cultural events and arts “scene”
Human assets	Here you at least want to get a general idea of the people-based resources and skills that you could lean on for your economic development work.	<ul style="list-style-type: none"> • Identifying individuals with talent, skill, experience or time to contribute or be connected with for guidance • Social networks and organizations

ABOUT US: KEY INFO AND ASSET INVENTORY



TIPS

There is a huge range of additional statistical data available to you, from business statistics to tourism, climate and industry. Try to consolidate what your community already collects, such as business license data. For further suggestions on the type of data to collect and where to find it, take a look at the [BC Economic Indicators Library](#) developed as part of the Province's [Performance Measurement Toolkit](#). Don't get hung up on this stage if you don't have much time – the more info you have the better, but it's not intended to derail the goal of asset mapping.

KEY FACTS

QUICK STATS

List the most relevant/high level stats

- Stat 1
- Stat 2
- Stat 3
- Stat 4

COUNCIL DIRECTION

Provide a summary of the current council's direction or preference

CURRENT ACTIVITIES

- Activity 1
- Activity 2
- Activity 3
- Activity 4
- Etc.

PAST ACTIVITIES

- Activity 1
- Activity 2
- Activity 3
- Activity 4
- Etc.

KEY FACTS

RELEVANCE TO OTHER PLANS

Brief summary or quotes from existing documentation (OCP, previous economic development plans, land development strategies, etc.)

KEY ASSETS

- Key Asset 1
- Key Asset 2
- Key Asset 3
- Key Asset 4
- etc.

STAKEHOLDER AND PARTNER IDENTIFICATION

DESCRIPTION

This activity asks participants to consider all relevant players, including those who will be impacted by the local economic development process and strategy.

RATIONALE

- Commitment and involvement from key stakeholders and partners are vital for a successful planning process
- A defined engagement plan will ensure that no key voices are missed in the process

LOGISTICS

Duration: 30-45 minutes

Format: generated by project lead or small group discussion with project team

Key Players: project lead; could also involve other team members

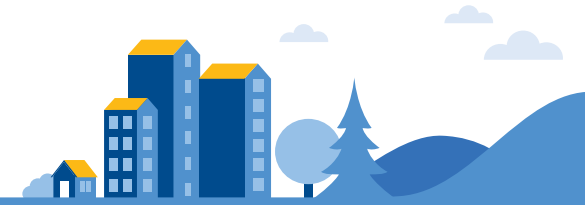
Resources: flip chart paper, markers, pens, scratch pads, Key Facts

OUTPUT

A list of stakeholders and partners for action and implementation that could be used to create consultation and engagement plan or simply as a planning resource during the strategy phase.

PROCESS

1. Individually, or as a group, generate a list of partners and stakeholders using the template worksheet on the next page.
2. Discuss as a group (if generated individually) and create list together on poster paper. Refer to the [Stakeholder Pull-Out](#) for more guidance on specific stakeholder groups.
3. Notes will feed into next stage of the process (creating the engagement plan).





DISCUSSION TEMPLATE

Questions	List of Partners/Stakeholders
Who should/could be involved?	
Who might benefit?	
Who might be negatively affected?	
Who should be included because of their relevant formal position (e.g. government authority)?	
Who should be included because they have control over relevant resources (e.g. money or expertise)?	
Who has the power to hinder or block implementation (e.g. activist groups, lobby groups, implementing agencies)?	

TIPS

Remember that diversity will greatly benefit the stakeholder group. Keep the following in mind:

- Who has access to/knowledge of existing data on the local economic context?
- Who has local economic development experience?
- Who has political will?
- Who will be committed?
- Which groups are typically under-represented in the community's economic development processes?

Take a look at the [Stakeholder Pull-Out](#) to get more insight into groups you may want to consult with, and how to approach them.

STAKEHOLDER AND PARTNER ENGAGEMENT

DESCRIPTION

Building upon the stakeholder identification exercise, it is important to consider potential roles for key stakeholders, as well as the most effective ways to engage them.

RATIONALE

- Commitment and involvement from key stakeholders and partners are vital for a successful planning process
- A defined engagement plan will ensure that no key voices are missed in the process

LOGISTICS

Duration: 30-45 minutes

Format: generated by project lead or small group discussion with project team

Key Players: project lead; could also involve other team members

Resources: flip chart paper, markers, pens, scratch pads (if doing group exercise)

OUTPUT

A categorization of stakeholders and partners, as well as the information needed to develop a stakeholder and partner engagement plan. It can also serve as a potential outline of who should be included on an advisory committee.

PROCESS

1. Use the list generated in the previous step to complete the matrix on the following page individually or as a group.
2. Consider and rank the role that stakeholders and partners will play:
 - A. Essential - The process could fail without their involvement
 - B. Important- Implementation may suffer without their involvement
 - C. Minor- Nice to have, but not critical to the process
3. As you move through the list of partners and stakeholders, also consider when and how to best engage those identified, answering the following questions:
 - What are the best ways to get input?
 - What has worked in the past when engaging these groups?
 - What hasn't worked in the past when engaging these groups?
4. From this assessment, identify the partners and stakeholders to actively include in the strategic planning process and integrate them into your workplan.





STAKEHOLDER ASSESSMENT TEMPLATE AND EXAMPLES

Partners/Stakeholders	Partner Assessment	When and How?
Ask yourself: Who are the key stakeholders and partners?	Ask yourself: Are the Partners or Stakeholders A – Essential B – Important C – Minor ?	Ask yourself: <ul style="list-style-type: none"> • What are the best ways to get input? (One-on-one? On-line survey, open house) • What's worked in the past, what hasn't?
<i>Example:</i> <i>Local First Nations</i>	<i>Example:</i> <i>A - Has potential Aboriginal title over key resource areas, and has expressed interest in working together and "packaging" area attractions</i>	<i>Example:</i> <i>Joint council meetings, staff to staff meetings, include FN businesses in survey</i>

CASE STUDY

The Township of Oro Medonte is a township in south-central Ontario with a population of approximately 20,000. Their Economic Development Plan, completed with the assistance of the Ontario Ministry of Agriculture, Food and Rural Affairs and the Ontario Ministry of Tourism, was finalized in 2011.

During the plan, the Township conducted the following engagement:

- Two public Asset Mapping/Visioning exercises, with participation from approximately 60 people
- An online survey, with responses from 56 people
- A community meeting for action planning

Following the community meetings and online survey, the Township conducted a geographical analysis to assess whether participants reflected the variety of businesses in the Township. Further personal interviews were then conducted with local businesses identified as under-represented in the engagement process.

A stakeholder and partner engagement activity, such as the one identified here, allows for identifying the stakeholders and partners for a LED work plan. It is also useful for a check-in during the planning process, in order to see who hasn't been successfully engaged and who needs to be targeted in further engagement.

STAKEHOLDER PULL-OUT

WHY ENGAGE

Local Economic Development is by nature, people-centred and community-led. Since it is a participatory, community-driven process, diverse stakeholder input and involvement is necessary to the success of any LED process or plan. It is important to provide the opportunity for input from diverse segments of the community, using methods that are appropriate and effective. This can be challenging. This overview will provide some ideas for engaging with groups that may not typically be included in the engagement process.

WHO TO ENGAGE

Groups that may be under-represented in engagement processes include:

1. Young professionals
2. Seniors
3. Youth
4. First Nations
5. Newcomers

Who else in your community may not be typically represented in planning or consultation? Are there any other voices or perspectives that may add value to any stage of the process? Other groups you may want to consider are: the impoverished or homeless, stay-at-home parents, commuters.

HOW TO ENGAGE

In designing an engagement/public involvement plan, consider the unique needs, lifestyles and skills of the groups you are trying to reach. All engagement requires drawing on different methods and styles of outreach depending on, not only on the groups you wish to engage, but also the depth in which you wish to engage a group, and the information you wish to gather. The following are tips to consider when designing your engagement:

Connect with existing channels and resources. Consider the important places and resources for those you are looking to engage. Work with existing groups. Hold engagement sessions at locations that are familiar and convenient that will make participation more comfortable and accessible.

Consult before engaging. Consider discussing the best means for engagement with representatives or leaders of the different groups you wish to engage. For example, you might want to ask about the most effective engagement methods, the most convenient locations, common barriers to participation as well as how to address them.



STAKEHOLDER PULL-OUT

Ensure pathways for meaningful and authentic engagement. Consider how to demonstrate the impact different groups' participation and input will have on your planning process. Transparency is key to showing people their involvement is valued and useful. On the other hand, tokenism and people feeling unheard can lead to distrust and disillusionment with LED planning and other planning processes.

Be flexible. Consider how you can plan your engagement to support and suit the schedules and lifestyles of the groups you wish to engage (e.g. work schedules, transportation needs, family life, etc.). In some cases, informal outreach may be the best method to involve those who are not likely/able to attend a scheduled open house.

FOR YOUNG PROFESSIONALES

- Consider holding engagement sessions at existing meetups, events, incubators, support programs and popular restaurants and bars
- Incorporate networking opportunities in your engagement event
- Use branding to ensure your LED process is recognizable
- Utilize online technology and social media to encourage participation and gather feedback and ensure your engagement process is suitable for mobile use and viewing
- Keep the requirements of engagement short to ensure that young professionals can engage easily and quickly

FOR SENIORS

- Consider holding engagement at seniors centres, service clubs, faith organizations and recreation facilities
- Consider the technology literacy of seniors. Some seniors are not comfortable using online devices so you will want to have print materials. On the other hand, an increasing number of seniors are accessing information online and will want to engage using computers, phones and tablets.
- Consider age related physical changes (e.g. mobility, eyesight, hearing loss) and how your engagement methods can be adapted to suit challenges



STAKEHOLDER PULL-OUT

FOR YOUTH

- Consider holding engagement at schools and universities, youth centres and other youth program locations
- Effectively utilize common social media challenges to encourage participation and/or gather input (e.g. Facebook, Twitter, Instagram and blogs)
- Again, keep the requirements of engagement short so that youth can engage easily and quickly but also have options for deeper levels of engagement
- Consider training youth to be facilitators or involving youth in organizing and committee roles

FOR FIRST NATIONS

- Consider relationship building before jumping into engagement. There is often a lack of communication between First Nations and non-First groups and historical issues and past injustices may need to be addressed before meaningful engagement can be conducted.
- Consider face to face, one-on-one and small group engagement
- Consider holding engagement at First Nations' administration or community facilities
- Involve community leaders and elders at all stages of the planning process
- Include in core project team if possible

FOR NEWCOMERS

- Consider holding engagement at social service and settlement organizations, community centres and faith organizations
- Be mindful of cultural and religious practices when planning engagement sessions
- Consider potential language barriers and if translation services and translated materials will be needed
- Consider providing childcare or letting parents know children are welcome



STRATEGIC ASSESSMENT

DESCRIPTION

Similar to a SWOT this strategic exercise highlights both the community's strengths and areas for improvement, using both to identify opportunities to build upon existing strengths and address any gaps and trends.

RATIONALE

- Builds interest and commitment through sharing positive and constructive stories
- Provides framework for subsequent strategic goal and action-setting

LOGISTICS

- Duration:** 10-60 minutes, depending on format
- Format:** conversation, business walk, online form, group session; see next page for details
- Key Players:** could include: project team, community stakeholders, public
- Resources:** notepad/computer to record; poster paper and markers for group sessions; asset inventory print-outs (if applicable); Key Facts

OUTPUT

List of community's economic strengths, areas to improve on, and potential opportunities to build upon.

PROCESS

1. Icebreaker: ask interviewee or group to each share a positive story or experience they've had in the community related to the local economy.
2. Discuss common elements within the story. Start list on flip chart/template under "**What are our strengths and what are we doing well**" and prompt discussion on community's strengths. Refer to asset list if helpful.
3. Next, turn to discussing "**Where could we improve**" to explore gaps or shortcomings and record on a second poster page.
4. Direct the participant(s) to consider both lists, and move to identifying what **opportunities and trends** can be taken advantage of to: build on strengths, address gaps and consider new approaches based on local, regional and broader trends – record on third sheet of poster paper. Refer the group to the [Key Facts Template](#) if you have completed one. Be sure to consider as well "**What's going on around us?**".
5. Once you have completed all consultation regarding strengths/improvements/opportunities, consolidate in one overall document that captures bullet points of what was conveyed.





CUSTOMIZE

We recommend using one or more approaches to canvassing project team members and community stakeholders on these three questions. The exercise can be augmented to fit a number of contexts – this is also a great opportunity to check in with the key community stakeholders identified in your workplan and to generate enthusiasm and buy-in for the process. Here are a few ways in which this could be modified for a variety of contexts:

Interview: set up a few phone or in-person interviews (10-15 minutes in length) with various members of your business community or other relevant stakeholders to get their take on the strengths, improvements and opportunities that they have identified for the community.

Business Walk: organize a tour of a selection of your local businesses to check in with them about how business is going and gather their feedback on the strategic questions.

Public feedback: this could be as simple as a feedback form on the website, quick survey via website/social media/newsletter or general questions posted directly to social media. For a more robust in-person consultation, you could incorporate the questions into a town hall meeting, or set up group discussions by advertising at local sources (newspapers, public notice boards, libraries, etc.).

Council meeting: this is a good discussion for council members to have. Facilitate the group through the above exercise.

Project team group session: at the very least you will want your project team to work through the questions above.

TIPS

- Keep your Strategic Assessment short and simple, but remember to include important details. For example, if you think you are doing promotion well, list the items that are making it work – regularly updated website, good highway signage, etc. – so these don't get lost or forgotten.
- Consider opportunities for collaboration within the community and with other jurisdictions/organizations. But also be aware of where competition is the reality. Be specific about how to take advantage of each.
- Think about the factors that are essential to the success of your community, and what you have to offer that other communities don't.
- When you finish your Strategic Assessment, think about doing a simple prioritization based on areas where extra effort will have the biggest positive impact.

VISIONING

DESCRIPTION

A vision is vital to providing direction to the local economic development process. This tool walks participants through the process of establishing the vision for the community, asking participants to imagine the future they'd like to see.

RATIONALE

- Provides an end goal around which to base the strategic plan
- Captures the strengths and opportunities within the community

LOGISTICS

- Duration:** 30-60 minutes
- Format:** small workshop activity or icebreaker in large group
- Key Players:** could include: project team, community stakeholders, public
- Resources:** flip chart paper, markers, individual paper and pens; previously created materials if applicable (Key Facts, strategic assessment)

OUTPUT

A clear and concise statement that communicates the overall desired future of a community and reflects the community's values. The vision can also be used to articulate the community's overall economic goals.

PROCESS

1. Ask participants to consider the strengths, improvements, opportunities and assets unique to the community (if applicable from previous exercises).
2. Consider as a group what ten years in the future may look like – what could the economic aspects of the community look like? What is different from now? What is similar?
3. After this discussion, ask participants to jot down on individual pieces of paper descriptive words, images or phrases that capture their ideal vision of their community in ten years.
4. Roundtable sharing of words/phrases, with facilitator recording on poster paper.
5. Together, discuss the various words and pull out/circle common or agreed upon phrases.
6. Tying these concepts together in a statement is often best done by a single person (project lead). We recommend ending this part of the meeting here, with final statement crafting to be done by the lead. At this point in the meeting, using the ideas generated for your vision, you may want to move on to [Identifying Strategic Areas](#).
7. Circulate draft vision to the group for input; make changes as necessary but don't dwell on this stage.





HOW IT FITS

An additional add-on exercise for the visioning exercise is to create a name or title for your plan that reflects the vision. There are a number of ways to do this. One is to ask participants to contribute an appropriate, home-grown name for the strategy before an event or meeting, and then generate additional ideas during the meeting or event. At the end of the session, vote on the name of the plan. Multiple rounds of voting might be needed (by hand or by volume are some ways of voting quickly). Consider offering a prize for the name that gets chosen. This almost always achieves a catchier name and buy-in than the “XXX Town Economic Development Plan.” Alternatively, when words are brainstormed during the process outlined above, also focus as a group on coming up with related and catchy titles for the strategic plan.

Examples:

- “Port of Potential Strategy” - Village of Port Alice
- “Tides of Change” – Cormorant Island Economic Development Strategy
- “Growing Malcolm Island – Our Economic Development Strategy”

TIPS

- Consider both the overall vision and the “mini visions” in specific areas, as these considerations will help when choosing strategic areas. It’s fine to brainstorm both at once!
- During the visioning process, it is easy to get bogged down with details. Keep the vision short and simple and don’t try to wordsmith in a group setting. The vision from the Official Community Plan or other public processes may also work for or help inform a local economic development process vision.

PUBLIC CONSULTATION

Bring it online – post on social media or directly on your website to ask community members to indicate where they want to see their community in ten years. You could ask, for example, for members to come up with three words that will describe the future community (though be aware that if it’s on social media it may require some moderation).

It could also be integrated into a community town hall or other meetings – ask attendants to record on a slip of paper a collection of words or a phrase they would use to describe their ideal version of the community in ten years. You could also put raffle-style boxes around town at libraries and other public meeting places.

CASE STUDY

The City of Colwood is a fast growing city on Vancouver Island, with a population of 16,093 (2011). Colwood’s 5-year Economic Development Strategy was approved in September of 2014. To develop the plan, the process was split into 5 phases; during Phase 4, the city developed a vision for its economic development strategy.

To develop this vision, the economic development strategy drew on the city’s Official Community Plan vision, “Our sustainable community, nestled in a rich networks of hills, creeks, lakes and the sea, is defined by attractive, compact and complete centres connected by multi-modal transportation corridors. Our sustainable community is welcoming and inclusive for all and is planned and designed to support the needs of a diverse and changing population.”

With the input received throughout the strategic planning process, it developed the following vision for its economic development strategy: “Our sustainable community is innovative and forward thinking in its approach to economic development reflecting both the needs of our business community and our desire for a balanced and sustainable approach to growth.”



EXAMPLES

“Wellington County will be a collaborative community that protects and enhances its natural and cultural heritage assets while supporting the longer term economic and social prosperity of its residents and business community.”

–Wellington County Economic Development Strategic Plan

“Through coordinated investment, promotion and development, Cormorant Island will build on the existing economy, culture, history and infrastructure by leveraging resource-based, value-added opportunities, seasonal tourism and marine commerce. These efforts will improve the business environment and create a solid base for entrepreneurs and small businesses to succeed, thus improving island vibrancy that will in turn attract new businesses and investment leading to a stronger year-round economy based on community values.” - Tides of Change- Cormorant Island Economic Development Strategy

“Elliot Lake is an affordable community for families of all ages to live, work and grow. We are a resilient, enterprising and self-sustaining community that continues to cherish the amenities at our doorstep and the wilderness in our backyard. Come see what we love.” –Elliot Lake Economic Development and Diversification Strategy

“By 2020 Solomon will:

- Have the VOS [The Village of Solomon] & SNC [Solomon Native Corporation] working together for capacity building and creating new projects.
- Enhance the local economy while staying true to subsistence traditions.
- Empower ourselves and each other as a community to enhance and strengthen our social and economic future.
- Strive for unity.

- Engage and empower our youth to be leaders.
- Utilize our elders and youth to revitalize our culture and traditional values.”

-Village of Solomon Local Economic Development Plan

IDENTIFYING STRATEGIC AREAS

DESCRIPTION

While the vision captures an overall ideal, this step clarifies which economic development areas will be targeted to achieve the vision. Once these categories are established, setting goals for these areas will pave the way for strategizing and monitoring progress.

RATIONALE

- Focuses on areas of mutual interest and opportunity
- Grounds overall vision in several target areas
- Makes it easier to establish action items

LOGISTICS

Duration: 30-60 minutes

Format: small workshop activity

Key Players: project team (with additional community stakeholders or council as desired)

Resources: flip chart paper, markers, vision statement, Key Facts

OUTPUT

A breakdown of the vision statement into specific strategic areas, with the option to include goals for each area.

PROCESS

1. This step works best in tandem with your vision brainstorming and can be done at the same meeting. Record your vision (or collection of agreed-upon words if not finalized) on a whiteboard or poster paper. Discuss some of the common elements that came up when considering where you want to be as a community in 5-10 years.
2. As a group, brainstorm the different factors that need to be in place to achieve this vision. It can be helpful to draw it as a map to visualize. Address the question: **To achieve this vision, what do we need to have in place?** If you like, have the group brainstorm individually or in pairs before discussing as a group. These should be BROAD strategic areas in the vein of "titles". See examples on following page.
3. Once you have generated a list of possible strategic areas to concentrate on, record 2-4 per page on poster paper and post around the room (or let participants vote right on the map if large enough).
4. Provide each participant with three to five sticky dots, and ask them to place them beside the subjects they think are most relevant to address in the LED strategy. Explain that individuals can only place one dot next to a single option (i.e., can't put all of their dots on one option).
5. Discuss results as a group and get an overall sense of agreement on the top 2-5 strategic areas identified; gain general consensus that you will move forward with strategizing around these chosen subjects.



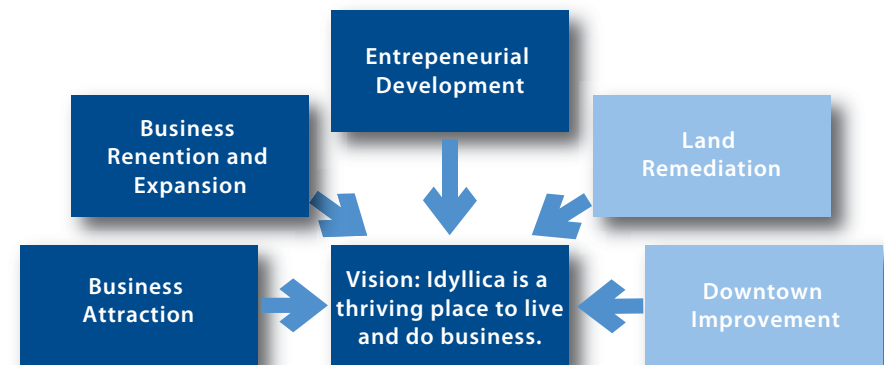


EXAMPLES OF COMMON STRATEGIC AREAS

- Business Retention and Expansion (BRE)
- Tourism marketing
- Investment attraction
- Sector or cluster development
- Community promotion and marketing
- Area targeting or regeneration
- Downtown improvement
- Skills training and/or workforce attraction
- Community infrastructure
- Entrepreneurial development
- Resident attraction
- Marketing local products

MAPPING EXAMPLE

Use this simple map (drawn on poster paper or a whiteboard) to discuss what key areas require focus to realize your vision. Record your vision at the centre, and link all brainstormed strategic areas. In this example, the darker boxes were the ones chosen by voting/consensus as the three target strategic areas for this strategy.



TIPS

- Different participant types (e.g., council and local government staff) can be given different coloured dots to track any differences in rankings.
- Keep in scope – it's better to target just 2-3 areas in a two or three year plan, particularly if you're a smaller community or just starting out your LED program. Focus on the areas that are most actionable and most needed.

STRATEGIC AREA GOALS

DESCRIPTION

After identifying the strategic areas your community will be focusing on, this exercise helps your project team set over-arching goals for each of the chosen strategies.

RATIONALE

- Helps to establish the priorities and values of your community
- Acts as a target to work towards
- Helps to track and monitor progress and success

LOGISTICS

Duration: 30-60 minutes

Format: small workshop activity

Key Players: project team (with additional community stakeholders or council as desired)

Resources: flip chart paper, markers, vision statement, Key Facts

OUTPUT

A distinct goal (or “mini vision”) for each of the identified strategic areas with an initial sense of how you may go about measuring progress towards these goals.

PROCESS

1. For each strategic area, discuss as a group some key goals you wish to see achieved within the scope of the strategic plan. The goals should be SMART:

SMART goal-setting is:

Specific: identifies what will be accomplished

Measurable: change can be tracked

Achievable: is supported by the available resources

Relevant: relates to community needs and overall vision

Time-bound: should be grounded by the plan's timeframe

2. Brainstorm a series of high-level goals related to each strategic area, and test against the SMART criteria in a group discussion. See Plan on a Page example for reference on how these goals factor into a plan, as well as a list of examples on the following page. Think of them as vision statements for each of the strategic areas.
3. As this will likely be your concluding conversation related to vision and strategic areas, it may be useful to have the project lead create a clean draft document with the vision, strategic areas and respective goals laid out for team review and confirmation via email or during the next meeting.





GOAL EXAMPLES

Strategic Area	Goal
Business Retention & Expansion	To lower the rate of annual business closures in the community
Entrepreneurial development	To support and promote entrepreneurial development in the community
Business Attraction	To attract businesses to the community in the targeted sectors

CASE STUDY

Prince Edward County Community Development Strategic Plan

Vision:

“The County we envisage will continue to have the social and cultural values that have evolved through time; a community spirit, a sense of belonging, a tradition of self-reliance, social responsibility, sharing, neighbourliness and an appreciation of heritage and culture. The special community and lifestyle will have been preserved through new economic opportunities.

Goals¹:

- To build greater awareness of the County’s lifestyle and visitor experience to attract new residents, visitors and investment opportunities.
- To enhance the County’s competitive advantage for attracting and retaining business and investment in our traditional and emerging sectors.
- To preserve and enhance our County’s community and cultural assets, resources and knowledge to create thriving villages in which to live and visit.

- To take a leadership role in supporting strategic and collaborative community development between Prince Edward County and our economic development partners.

¹ Note: presented as “Objectives” in original plan.

TIPS

Measuring Success

While often left until the end (or left off entirely!), this is the ideal time to be considering how you will monitor and measure the progress and impact of your activities. By setting SMART goals, you’re already in a great position to identify indicators of success. Be sure to also consider as a group at this time how you will measure or assess these goals and activities, and keep the conversation going throughout the rest of the strategic planning process. You may find it helpful to map your plan as you go along, where you can see how your specific activities pave a route to your overall vision.

The [Performance Measurement and Monitoring](#) section of this toolkit provides more guidance on this, and is linked into the [Performance Measurement Toolkit](#), which helps you map your program and choose indicators that you can attribute to your activities.

ACTION DEVELOPMENT

DESCRIPTION

Once the team has decided which direction to focus the local economic development efforts, the next step is to select the activities that will help further these goals. This exercise helps participants brainstorm action items related to the strategic areas. The activities will then be prioritized in the next exercise.

RATIONALE

- Crucial to move from vision and strategic areas to specific action in order to get the plan off the ground
- By pairing strategic areas with actions in a long list, it creates a comprehensive list to then narrow down

LOGISTICS

Duration: 60-90 minutes

Format: individually or small workshop activity

Key Players: project team (with additional community stakeholders or council as desired)

Resources: flip chart paper, markers, vision and objectives

OUTPUT

A comprehensive list of potential action items as directly related to the strategic areas and goals (if applicable).

PROCESS

1. Using the template provided on the next page, brainstorm action items as related to each of the strategic areas that you have identified. This can be done:
 - Individually, over email and consolidated by the project team
 - In a group discussion setting
2. Ask participants to consider “What needs to happen to move this forward?” Record these action ideas. Additional sources of inspiration can be found on the following page. Be sure to refer back to the previous steps and materials created. What was discussed during the strategic assessment? Were any specific ideas brainstormed or put in the “parking lot” at that point? What opportunities were identified?





TEMPLATE AND EXAMPLES

Strategic Area	Action Ideas
EXAMPLE 1: Retain and expand existing businesses	<ul style="list-style-type: none"> Do a business survey/walk (find out what local businesses need) Marketing support (link up businesses on community and provincial web sites) Skills workshops Networking: Establish a Chamber or business group (i.e. Chamber "lite") Improve signage and wayfinding (to and around community)
EXAMPLE 2: Downtown improvement.	<ul style="list-style-type: none"> Incentivize vacant properties Improve street lighting New street signs and banners Improve parking Monthly community clean-up
Strategy X	

CASE STUDY

Tides of Change is a joint economic development strategy for the 'Namgis First Nation and the Village of Alert Bay on Cormorant Island - a small island off of the northeast coast of Vancouver Island.

Improvements on the harbour and marina were identified as the number one economic opportunity for the island, and an important way to capture tourism traffic, grow the fishing fleet and improve quality of life.

Examples of actions within this strategy area are as follows:

- Research funding opportunities and availability for harbour redevelopment
- Fuel dock business plan/feasibility study
- Harbour redevelopment plan
- Marina redevelopment

TIPS

- Feel free to brainstorm multiple options to action each strategic area.
- If you also have set specific goals for the strategic areas, you could include them as a column in the middle to direct your brainstorming.

PRIORITIZING ACTIVITIES

DESCRIPTION

As a final step in the brainstorming and prioritization process, this exercise helps to narrow the focus on a selection of high-priority activities that are realistic, achievable and provide benefits to the community.

RATIONALE

- Create a shorter list to bring to the action planning stage
- Identify options that can be easily implemented in the very short-term, i.e. “quick starts”
- Screen out options that may not be feasible or “just don’t make sense”

LOGISTICS

Duration: 45 minutes

Format: individually, a few project team members or workshop

Key Players: project team (with additional community stakeholders or council as desired)

Resources: flip chart paper/template, markers, vision, objectives, strategies and brainstormed activities

OUTPUT

A short-list of action ideas, with rankings and an understanding of their time frame.

PROCESS

1. Use the list of brainstormed action items to populate the rating matrix provided on the following page. This can be done either on poster paper, on hand-outs or on a computer/projection screen.
2. Either individually, in a small group or workshop, evaluate each of the activities on a five-point scale (1 being low degree, 5 being high degree) on the following considerations:
 - Financial reality: Is it a financially realistic option? Does the community have funding or potential access to funding to cover potential costs?
 - Ease of implementation: Can it be implemented at the community level? Are there significant barriers to overcome? Does it depend on other levels of government/organizations?
 - Partner benefits and support: Would the option create benefits for partners and would they support it?
3. Total the scores and discuss results.
4. Decide on the top activities that your community will focus on for the duration of the strategy (recommended 1-3 years). Link these actions to the strategies they are associated with, and use these as the final strategies for your plan (see Final Activities template on following page).



PRIORITIZING ACTIVITIES



RANKING MATRIX AND EXAMPLES

Action	Financially realistic	Ease of Implementation	Partner Benefits	Score
	(1=low degree 3=moderate degree 5=high degree)			
Develop community website	2	2	4	8
Tourism marketing campaign	3	2	5	10
Business walks initiative	5	4	5	14
Action X				
Action Y				
Action Z				

FINAL LIST OF ACTIVITIES

Vision	Strategic Area	Strategic goal (if applicable)	Action
Record your vision here	Improve marketing and promotion	Attract and retain residents of all generations	Develop community website
		Continue to grow tourism in region	Tourism marketing campaign
	Retain and expand existing businesses	Reduce business closures and increase gross local sales	Business walks initiative
			Action X
			Action Y
			Action Z

PRIORITIZING ACTIVITIES



CASE STUDY

The Village of Tahsis is an isolated village on West Coast Vancouver Island with about 300 year-round residents. The economic development strategy resulted from the closure of two key accommodation providers, which led to great economic uncertainty for the Village.

Through community workshops, community surveys and interviews, the consulting team developed a long-list of over a hundred opportunities and ideas for the economic strategy. The consulting team used the following questions to narrow-down their list:

- Does it require further investigation?
- Can it be combined?
- Can it be grouped by function (e.g. marketing, infrastructure)?
- Does the Village have a clear role as lead or major partner?

After the ideas were assessed, the remaining 56 opportunities were ranked by criteria - cost, availability of resources, ease of implementation and benefits.

TIPS

Discuss the top-scoring activities and select those that you would be able to reasonably achieve within the duration of your strategic plan (i.e., 1-3 years)

(insert relevant image(s) from community)

Title

Economic Development Plan

Community Name

ECONOMIC DEVELOPMENT PLAN

INTRODUCTION

Provide a small amount of contextual background for your plan. This could include:

- *Why you're undertaking economic development planning and work (rationale)*
- *Brief overview of how plan was consulted upon (who was involved) and created*
- *Purpose of this plan, and what amount of time it covers*
- *Message of support from mayor*

ECONOMIC DEVELOPMENT PLAN

WHERE ARE WE NOW?

Here you should provide a summary of:

- *Key statistics and/or Community Profile summary*
- *Assets*
- *Alignment with other plans*
- *History of economic development work and previous activities and accomplishments in area*
- *Strategic assessment highlights (strengths, challenges, opportunities, trends)*

Keep these sub-sections brief, and build off of the work you did during the planning process to populate – use your Key Facts document to guide you, as well as the work you did in the strategic assessment process. Only provide high-level descriptions, and direct readers to the full document(s) in the Appendix as required.

ECONOMIC DEVELOPMENT PLAN

WHERE DO WE WANT TO GO?

Vision

Provide a brief overview of how you arrived at your vision statement.

“Insert vision statement here.”

Strategic Areas and goals

Briefly describe how you decided to concentrate on the chosen Strategic Areas; link back to strategic assessment of strengths and opportunities.

Title (Strategic Area 1)

1-2 sentence overview of Strategic Area, with goal(s) listed.

Title (Strategic Area 2)

1-2 sentence overview of Strategic Area, with goal(s) listed.

Title (Strategic Area 3)

1-2 sentence overview of Strategic Area, with goal(s) listed.

Title (Strategic Area 4)

1-2 sentence overview of Strategic Area, with goal(s) listed.

ECONOMIC DEVELOPMENT PLAN

HOW ARE WE GOING TO GET THERE?

For each of the Strategic Areas and goals described above, specific strategies and action items have been generated as follows:

Title (Strategic Area 1)

Goal:

Actions

List specific action items for strategy

- *Action 1*
- *Action2*
- *Action...*

Details

- *Milestones and responsibilities should be included in the implementation plan, but you could expand on it here if you wish.*

Title (Strategic Area 2)

Goal:

Actions

List specific action items for strategy

- *Action 1*
- *Action2*
- *Action...*

Details

- *Milestones and responsibilities should be included in the implementation plan, but you could expand on it here if you wish.*

Title (Strategic Area 3)

Goal:

Actions

List specific action items for strategy

- *Action 1*
- *Action2*
- *Action...*

Details

- *Milestones and responsibilities should be included in the implementation plan, but you could expand on it here if you wish.*

ECONOMIC DEVELOPMENT PLAN

Title (Strategic Area 4)

Goal:	
Actions	Details
<p><i>List specific action items for strategy</i></p> <ul style="list-style-type: none">• <i>Action 1</i>• <i>Action2</i>• <i>Action...</i>	<ul style="list-style-type: none">• <i>Milestones and responsibilities should be included in the implementation plan, but you could expand on it here if you wish.</i>

IMPLEMENTATION PLAN

Provide a few lines of context about how you plan to implement these actions over the coming term. If relevant, profile the related stakeholders, project team members or committees that will be taking the lead.

Copy in implementation framework here

ARE WE GETTING THERE?

Monitoring

Briefly describe your overall approach to monitoring.

Performance measurement

Briefly describe your overall approach to performance measurement.

Copy in your measurement framework, if applicable.

Evaluation

Briefly describe your overall approach to evaluation.

Copy in your evaluation framework, if applicable.

<COMMUNITY NAME>

ECONOMIC DEVELOPMENT PLAN

APPENDICES

Attach any relevant appendices here. This could include:

- Excerpts from related plans
- Council/meeting minutes or resolutions
- Key Facts or community profile
- Strategic assessment
- Others

ECONOMIC DEVELOPMENT

Vision: Record community's vision for economic development here.

Strategic Area (SA)	Title (SA – 1)	Title (SA – 2)	Title (SA – 3)	Title (SA – 4)
Goals	<i>Insert goal statement(s) here. Leave blank if you did not establish goals.</i>	<i>Insert goal statement(s) here. Leave blank if you did not establish goals.</i>	<i>Insert goal statement(s) here. Leave blank if you did not establish goals.</i>	<i>Insert goal statement(s) here. Leave blank if you did not establish goals.</i>
Action	<i>List actions in point form. Put target date in brackets if you like.</i>	<i>List actions in point form. Put target date in brackets if you like.</i>	<i>List actions in point form. Put target date in brackets if you like.</i>	<i>List actions in point form. Put target date in brackets if you like.</i>
Measures of Success	<i>If applicable, list your chosen measures here. Otherwise, leave blank.</i>	<i>If applicable, list your chosen measures here. Otherwise, leave blank.</i>	<i>If applicable, list your chosen measures here. Otherwise, leave blank.</i>	<i>If applicable, list your chosen measures here. Otherwise, leave blank.</i>

IMPLEMENTATION PLAN

PURPOSE OF GROUP

Once you have developed your strategic plan, it is time to move forward with activating your strategy. An implementation plan will help organize your vision into a defined workplan that provides a snapshot of when your activities will occur, who will be moving each action forward, notes around funding or resourcing, and how you will proceed. Ensure that each of your project team members have a copy of the plan, and that it's updated as needed.

Strategic Area	Action	Responsibility	Method	Funding/ Resources	Timing	Notes/Status
<i>State strategic area. Merge cells next to related activities as applicable.</i>	<i>Briefly describe the strategic activity</i>	<i>Name the key individuals involved, including lead person</i>	<i>Briefly describe how you will undertake this action</i>	<i>Outline the funding sources or resources required for this activity.</i>	<i>Provide dates/times and milestones</i>	<i>Space for notes or status updates</i>

Last updated: *date*

ACTIVATING YOUR PLAN

If you've worked hard to build a great plan but it's sitting on a shelf, gathering dust: you're not alone! One of the most challenging stages of strategic planning is getting going. This guide will provide some troubleshooting tips on how to overcome common obstacles, or how to set yourself up for success if you're just starting out.

"WE HAVE COMPLETED AN ECONOMIC DEVELOPMENT PLAN, BUT IT'S VERY LONG WITH MANY OPTIONS AND WE DON'T KNOW WHERE TO START."

Crucial to move from vision and strategic areas to specific action in order to get the plan off the ground. Many communities find themselves in the position of having developed a plan that exceeds their abilities to implement it, and it's hard to know where to start or what to prioritize. Some or all of the following steps may help to get you going:

- Grant matching: see what grant resources are out there and which actions in your plan meet the grant criteria. See if there are specific grant programs that focus on specific elements, or have a time-limited duration. Focus some of your initial efforts on those which satisfy these criteria. You will find that grant applications also become easier to complete when you have a strategic plan to link it back to.
- Capacity matching: shop the plan around and see what actions in the plan can be moved on by staff, community groups or enthusiastic individuals (i.e. those "grey dragons" – retired folks that have interest and experience and would like to participate, they just need some direction).
- Prioritize: re-group with key stakeholders for a session to focus on the strategic area and activity prioritization steps.
- Condense the strategy into a [Plan-On-A-Page](#): this exercise is often very helpful to evaluate and visually pull out what's most important.
- Organize your vision: use the [Implementation Plan Template](#) to clearly lay out who is doing what and when.

"WE HAVE A PLAN BUT WE CAN'T GET ANY TRACTION WITH KEY STAKEHOLDERS TO MAKE IT HAPPEN."

One of the most common reasons plans fail is that they did not adequately integrate the feedback and perspective of key stakeholders into the process. Getting early buy-ins allows for barriers to be removed and critical resources to be mobilized. Trying to sell the plan to those who did not contribute may be challenging, but taking some specific steps to overcome this resistance may help considerably. Options include:

- Identify "quick starts" – actions that are simple to do, visible and have broad support to re-energize the process and get momentum going.
- Target two or three key stakeholders to plan and implement one or more of the quick-start options to boost buy-in in process.
- Frame initial actions as a "pilot" to see how it works for stakeholders. Consult with them during and after, and assure them that the focus of the remainder of the plan is flexible and will be based on their feedback.
- Circle back to stakeholders and hold a session to re-imagine the plan before getting started.



ACTIVATING YOUR PLAN

“WE HAVE A GREAT PLAN, WE HAD STRONG OUTSIDE EXPERTISE PUTTING IT TOGETHER, BUT WE’RE NOT CLEAR ON HOW TO PROCEED (OR IT WENT NOWHERE).”

It is not uncommon for communities to stall after the strategic planning process. It may be due to limited capacity and resources, or it may be that there is no one who has taken the lead on acting on the identified strategies.

- Again, identify “quick starts”: actions that are simple to do, visible and have broad support to re-energize the process and get momentum going.
- Get committed champions: before wrapping up the process, get some committed individuals or organizations to take on some actions.
- Do action planning: develop detailed action plans with key stakeholders that identify clear tasks, lead and support individuals, resources and timelines.
- Work with an advisory committee: gather on a regular basis, formally or informally, with key stakeholders and political leadership to keep the plan alive.
- Build in initial “surge” funding or projects to give your plan a quick boost and get it off the ground with a project of significance, with involvement of multiple stakeholders to encourage buy-in in the process.

“WE DON’T HAVE FUNDS TO UNDERTAKE SOME OR ALL OF OUR DESIRED ACTIONS.”

Many communities do not have the financial resources required to get some desired projects off the ground. Be sure to:

- Familiarize yourself with the funding opportunities that may be suited to your specific context. Use the [Funding and Grants Search Tool](#) to identify what programs may fit your situation.
- Establish partnerships with local businesses and organizations to co-deliver projects. Often, this will put you in a better position to qualify for grants as well, when partnered projects receive more money (such as [BC Rural Dividend](#)).
- Brainstorm creative solutions to provide a kick-back to the community economic development function, such as buy-local events or gift card sales where a portion of the proceeds go back to economic development.

“WE CAN’T AGREE ON WHICH ACTIVITIES TO MOVE FORWARD WITH FIRST.”

Sometimes, the key players in the process can’t agree how to move forward. We suggest returning to [Visioning](#) and [Strategic Area Goals](#) to ensure that everyone is on the same page. Use some or all of the suggested methods in [Prioritizing Activities](#), and decide in advance if a certain person or group will have the final say. Also be sure to consult widely with stakeholders and spend some time on [About Us: Key Info And Asset Inventory](#) and [Strategic Assessment](#) – these activities often help to shed more light on the types of efforts that are most needed and will yield the most immediate results. If internal disagreement persists, try opening consultation up to town halls or online polls to break the stalemate.



ACTIVATING YOUR PLAN

“WE HAVE A LOT OF POLITICAL AND STAFFING TURNOVER OR ISSUES WITH CONSISTENCY IN KEY PLAYERS.”

The benefit of having clear strategic plan is that it is an enduring document that can be live on when key staff leave. To foster consistency:

- Have an approved plan: the plan should be clearly written and approved by appropriate council(s) or board(s).
- Committees: it should not be just one person’s pet project. Multi-stakeholder oversight committees with ties to political leadership or boards can provide bridge capacity when there is staff or political turnover.
- Record keeping: as the plan unfolds, keep minutes or record of key decisions in the process so that new individuals (staff or political) can understand the factors that led to particular decisions.
- Partnerships are key: active networks and partnerships with the business community, local chambers, community organizations and industry keep the planning active and responsive to changing business environments.

“WE HAVE ACTION ITEM(S) THAT WE DON’T KNOW HOW TO GET STARTED ON.”

There are several options for support and guidance for local economic development. These include:

- [B.C.’s Economic Development Portal](#), which contains a number of resources, tools, recorded webinars, grants and funding look-up and contact information.
- Each region in B.C. has a regional economic development manager, who can provide one-on-one support and guidance. If you’re not sure who your regional manager is, send a message to economicdevelopment@gov.bc.ca
- The [BC Economic Development Association \(BCEDA\)](#) is the professional association of economic development practitioners in B.C., and provides support services, professional development opportunities and other resources.
- The [Union of BC Municipalities \(UBCM\)](#) has a Community Economic Development committee that periodically produces research and advice to its members. The [Local Government Management Association \(LGMA\)](#) offers programs, workshops and webinars that may fit your needs.

“WE’RE CONSTANTLY BEING ASKED TO DEMONSTRATE WHY THESE ACTIVITIES ARE VALUABLE.”

Establishing monitoring, measurement and evaluation plans are an often overlooked but key success factor for initiatives of all kinds. By establishing a regular reporting and measurement schedule, you are empowered to represent your activities and their progress in a way that makes sense and relates directly back to the established goals. We recommend working through [Evaluation](#) and the [Performance Measurement Toolkit](#) to understand how to make measurement, reporting and evaluation a valuable (and not painful!) part of your process.



STRATEGIC PLANNING TOOLKIT

MONITORING AND MEASUREMENT

DESCRIPTION

This section provides an overview of the ongoing monitoring and measurement activities that will help guide the implementation of the strategic activities, assessing as to whether they are having the desired impact.

RATIONALE

- Allows you to easily report on progress and status
- Helps determine if the activities are having the intended effect

LOGISTICS

Duration: varies; ongoing

Format: varies according to desired approach

Key Players: project lead

Resources: provided templates and guidance; Performance Measurement Toolkit

OUTPUT

Monitoring plan and/or performance measurement framework.

PROCESS

1. **Monitoring:** keep track of the status of your strategic activities in an at-a-glance overview. This enables you to stay on track, and report out on the status of the activities on an as-needed basis. For ease of monitoring, we suggest using your [Implementation Plan](#) to track the status of your activities. Be sure to update on a regular basis (e.g., biweekly, monthly).
2. **Performance Measurement:** this important step tracks whether your activities are meeting the desired outcomes of the program. With the vision and objectives already in place, it's straightforward to set up a plan where data is collected on an ongoing basis and reported out on. The Province's [Performance Measurement Toolkit](#) will help you create an easy-to-use performance measurement framework, and contains reporting templates and an indicator library of over 200 of the most commonly used performance indicators (and their sources). Check out the resource or quick start guide to get started – for your convenience, the quick start guide can be found on the following page.

TIPS

It will take an hour or two to acquaint yourself with the principles of performance measurement and seeing how it will apply to your program. During this time, you can select a few quick-start indicators, or decide if you'd like to create a visual model to map your activities, desired outcomes and ultimate vision in order to pinpoint the indicators that best track your success. Measurement doesn't have to be onerous – set your own parameters and discover the value in mapping your progress.



PERFORMANCE MEASUREMENT TOOLKIT

TOOLKIT QUICK START GUIDE



I want to dive right in!

The best place to start is to download the [Excel Workbook](#) that will guide you through choosing performance measurement indicators that relate specifically to your program goals.

This fillable workbook takes you step-by-step through the process of identifying the most relevant indicators for your work and creating a performance measurement framework.

Use the [Toolkit User Guide](#) for context, tips and examples for each of the steps.



How long will this take?

We suggest taking an hour or two to work through the first stages of the workbook and getting a feel for the process. You can then complete it yourself, or convene for brainstorming in a small group setting.

The whole process can be completed in a half day, or you can chip away at the stages a bit at a time. The point is to get something down to start. Don't get bogged down in the details. Work on establishing a small selection of indicators that you can move forward with right away. You can always tinker over time!



Will I be accountable for things out of my control?

The benefit of setting up your own performance measurement framework is that you get to establish what you relate directly back to your program activities.

The approach used in this tool helps users differentiate between reporting on economic indicators and performance measurement.

By mapping out your activities and seeing how everything fits together, it becomes very empowering to pinpoint the aspects you can track in order to demonstrate your successes.



Do I have to complete every step?

Do what makes sense for you. If you already have a framework, feel free to review the [Excel Indicator Library](#) or examples to see if there's anything you want to tweak.

While we strongly suggest completing the program visualization stage, you're welcome to jump right in to brainstorming indicators and narrowing them down to a few that you want to act on right away.



What other support do you offer?

Within the toolkit, there are additional templates and examples to refer to. You can download an [Annual Report Template](#), as well as an infographic-oriented [Dashboard Templates](#).

There's even an [Image Library](#) to make it easy for you to make your reports visually appealing, and lots of examples scattered throughout, including [Fictional Community Case Studies](#) that will accompany you every step of the way.

EVALUATION

DESCRIPTION

This tool focuses on goal-based evaluation – looking at whether the strategic areas and goals are still a good fit, still feasible, and are being actively addressed. When looking at outcomes and performance, refer to [Monitoring and Measurement](#).

RATIONALE

- Useful for reflecting back on the progress of the program, and making important adjustments based on feedback to ensure that goals will be met
- Keeps programs responsive, flexible and well-informed

LOGISTICS

Duration: 30-60 minutes to establish evaluation plan; varied for execution

Format: easiest for the project lead to complete

Key Players: project lead

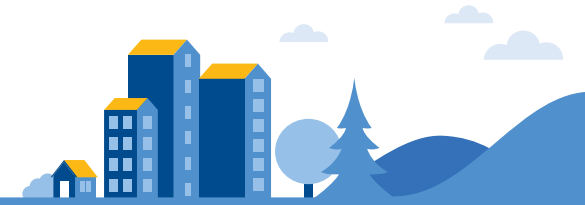
Resources: Current strategic plan

OUTPUT

Evaluation framework and plan; Revised strategic plan if applicable

PROCESS

1. If you haven't already, decide on how often you will evaluate the strategy. Typically, it's a good idea to do it midway in the strategy timeframe, and again at the end, as you decide how you want to move forward. Review your performance measures and integrate the information being tracked into your evaluation activities.
2. Look back to your stakeholder list, and decide how you would like to include them in the evaluation. Brief interviews using specific questions, or even a survey, are useful tools for consulting with stakeholders.
3. Draft a series of questions that will help you determine if your strategic goals are actively being pursued, and if any challenges have arisen. Develop into an evaluation plan using the template on the following page. Generally, you want to explore:
 - What is the status of the strategy's progress towards achieving the original goals?
 - Are the original timelines and resource allocation still sufficient?
 - Do the goals and strategies still reflect the needs of the community?
 - What challenges exist to achieving the goals? How can they be overcome?
 - What adjustments, if any, need to be made to the plan?
4. After going through this evaluation process, decide how you will report on the findings, and what steps will be taken to adjust or refocus your strategy.





SIMPLE EVALUATION PLAN AND EXAMPLE

The table below provides an example of an evaluation plan that reflects on the overall strategy status and direction. It is often easiest to explore a series of questions related to each strategic area with the relevant stakeholders, and then address general questions about the overall strategy to the project team. Collecting information for each question can be as simple as a series of discussions or interviews, or you could integrate additional documentation review, surveying, online discussion/social media feedback or focus groups. See [Evaluation Plan Template](#) for a customizable version.

Strategic Area	Evaluation Question	Information Source	Method	Responsibility
PA1: Business Retention and Expansion	What is the status of this strategic area and activities?	Project lead, chamber, business stakeholders, local gov staff	Interviews, online questionnaire, workplan review	Project lead
	What have been some of the benefits so far?	Project lead, chamber, business stakeholders, local gov staff	Interviews, online questionnaire, measurement and monitoring	Project lead
	Have there been any challenges?	Project lead, chamber, business stakeholders, local gov staff	Interviews, online questionnaire, measurement and monitoring	Project lead
	What changes, if any, are needed to ensure success?	Project lead, chamber, business stakeholders, local gov staff	Interviews, online questionnaire, focus group	Project lead
Overall	Was the process for establishing the strategic areas, goals and actions effective?	Project lead, project team, stakeholders	Discussion group	Project team
	Are the timelines and allocated resources still feasible?	Project lead, project team, stakeholders	Discussion group	Project team
	Do the overall goals and activities still reflect the needs of the community?	Project lead, project team, stakeholders	Discussion group	Project team
	What adjustments are needed to the overall plan, if any?	Project lead, project team, stakeholders	Discussion group	Project team



TIPS

This type of evaluation is based on observation and feedback – it’s a way to “check the temperature” of the program to see if any adjustments or course corrections are required. For looking at performance and specific program data and indicators of success, use performance measurement.