

2016 COMMUNITY EXCELLENCE AWARDS APPLICATION BEST PRACTICES, Organizational Development & Improvements

Filled Monday, June 13, 2016

Name of Local Government

Regional District of Central Okanagan, Economic Development Commission (COEDC)

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The Mayor/Chair is aware that I am submitting this application on behalf of my local government.

Yes

Project/Program Title:

Strategic Planning/Community Engagement Process

Project Summary Paragraph

Please provide a summary of your project/program in 150 words or less.

The COEDC is a function of the Regional District of Central Okanagan (RDCO) whose mandate is: "Working in partnership, to facilitate and encourage the development of a healthy and dynamic sustainable community economy by supporting existing businesses and encouraging appropriate new business investment within the RDCO".

Over the last 5 years, the COEDC has developed its Strategic Planning and Community Engagement Process, resulting in today's model of industry and stakeholder consultation and kpi benchmarking. Using the RDCO's 2015-2018 Strategic Priorities Plan and Regional Growth Strategy as the framework, the COEDC engages in a consultative process with a 45 member Advisory Board, stakeholder groups and industry leaders to formulate priorities and objectives in its annual Operational Plan. Each objective has actionable Programs/Tactics, Outcomes and Key Performance Indicators, providing a framework against which the COEDC, its 45 member Advisory Board, the RDCO Board and citizens can evaluate the effectiveness of the Commission.

Project Analysis

1. SERVICE DELIVERY

How has the implementation of this program/project improved services within your local government and your community at large?

The COEDC's extensive consultative strategic planning process is unique among economic development organizations. In 2011, a CFIB report indicated that the business community in the region felt disconnected from the regions' municipalities (CFIB Fall 2011). In response, the COEDC has worked to build partnerships with local business by engaging in an extensive Site Visitation program and implementing the first Business Walks program in Canada in 2012. Through these programs, COEDC conducts face to face meetings with over 500 local businesses each year, providing industry intelligence that directly informs strategic planning initiatives and serves as a funnel to identify businesses requiring additional specialized assistance from COEDC experts.

Industry intelligence obtained through the consultative process drives priorities and objectives in the COEDC Operational Plan. Objectives are organized by three programming streams: Business Retention & Enhancement, Investment Attraction, and Facilitation, Coordination & Communication. Each objective contains actionable Programs & Tactics, Outcomes and Key Performance Indicators, against which the COEDC's performance can be evaluated.

In 2016, the COEDC implemented the first cross-jurisdictional Regional Account Management System in the Okanagan to facilitate the sharing of information and standardize Site Visitation programs across the region. Industry intelligence entered in the system is shared among economic development officers in the region's member municipalities/governments, community stakeholder groups and post-secondary institutions, serving to inform regional training needs, guide strategic planning and leverage partnerships among stakeholders, ultimately increasing efficiencies throughout the region.

2. ORGANIZATIONAL DEVELOPMENT

How has the program/project served as a tool for both staff development and organizational improvement?

The Operational Plan resulting from the Strategic Planning and Community Engagement Process contains distinct key performance indicators used as a tool for evaluating the success and impact of programming. In the spirit of continual improvement, the COEDC regularly consults with industry and stakeholders to gauge the effectiveness of its programs through quarterly activity reports to the RDCO Board, semi-annual activity assessment reviews, surveys and numerous formal and informal interactions with industry.

As a regional function, the COEDC builds municipal capacity by providing coaching and development assistance to municipal economic development departments and

officers, including a site visitation program facilitated in partnership with Westbank First Nation (WFN) to promote best practices and provide advisory services as WFN develops its economic development goals and objectives. In addition, the Regional Account Management System was developed to promote best practices in site visitation programs for all member municipalities/governments through standardized surveys and to maximize efficiencies in the delivery of services to industry in the region.

3. ECONOMIC IMPACT

How has the program/project saved the community money and/or resources or encouraged economic development?

1. Workforce development and recruitment programs developed in response to industry needs to facilitate economic development in the region. For example, in April 2016, the COEDC brought together a cross jurisdictional delegation including government, post-secondary education and industry for the Make Digital Media Here Workforce Recruitment and Investment Attraction Campaign in Toronto, ON. As a direct result, local companies involved hired over 50 highly skilled employees who will relocate to the region and one company closed a multi-million dollar deal that will bring significant growth the tech sector.
2. The Regional Account Management System maximizes efficiencies, eliminates the duplication of services and helps stakeholder groups leverage partnerships, resulting in economic savings for the RDCO and member municipalities/governments.
3. Business Walk program, conducted in partnership with member municipalities/governments and community stakeholders, acts as a funnel to identify businesses that are struggling, considering relocation outside of the region or experiencing barriers to growth. The COEDC follows up with direct 1:1 assistance to prevent business closure and encourage growth.

4. TRANSPARENCY

How has this program/project improved upon accountability to the community's citizens?

95% of Central Okanagan businesses have fewer than 20 employees and 54% have no employees, representing one the highest levels of entrepreneurship in Canada. The COEDC provides representation to small businesses by engaging directly with hundreds of entrepreneurs through its Business Retention & Enhancement

programming. Intelligence gathered in these programs feeds directly into programming developed by the COEDC's in its Operational Plan and is communicated with elected officials and other decision makers, giving the region's entrepreneurs and the established business community a strong voice in the community.

All objectives identified in the Operational Plan have distinct actionable Programs & Tactics, Outcomes and Key Performance Indicators which serve to keep the COEDC accountable to its regional board and citizens. Though it is well known in the field that economic development initiatives are difficult to measure, the COEDC is recognized to be a leader in accountability in the industry and has advised the Province of BC on the development of its Performance Measurement Toolkit.

In 2012, the BC Economic Development Association (BCEDA) recognized the COEDC team's success in increasing the profile of the region and its businesses through Operational Plan programming by naming the commission the Economic Development Leader of the Year.

5. COLLABORATION

a. Tell us how colleagues/departments worked together to come up with innovative solutions.

The COEDC is a small, highly committed department of three full time staff members and four part time (0.5-0.75 FTE) contractors. COEDC staff members remain apprised of trends and undercurrents in key industry sectors through extensive collaboration with industry and partners. Though the Operational Plan identifies specific tactics and key performance indicators, the consultative process allows the COEDC to be dynamic and create innovative programs to meet evolving industry needs while continuing to align with the RDCO's strategic priorities and objectives.

The COEDC leverages partnerships with over 45 community stakeholder groups, including post-secondary institutions, business support organizations and industry alliances, to achieve common objectives.

b. Tell us how your Council/Board provided a supportive environment for implementing change.

Although accountable to the RDCO Board, the RDCO's bylaws facilitate an advisory/consultative environment through the formation of the COEDC Advisory Board. The COEDC leans on its highly committed 45 member Advisory Board to act as a conduit of community and business intelligence. This intelligence provides staff

with the background necessary to identify tactics, activities and strategic partnerships to facilitate a healthy, dynamic and sustainable regional economy. The 45 member advisory body includes representatives of stakeholder groups, local government, and key industry leaders representing a robust cross section of the regional economy.

6. INNOVATION

What makes this program/project innovative and creative?

The COEDC's Strategic Planning and Community Engagement Process is progressive and unique in the field of economic development. The plan is developed under the overarching framework of the RDCO's priorities and regional growth strategies and industry/community consultation through:

- Industry roundtables
- Service provider roundtables
- Stakeholder consultation
- Industry intelligence
- Advisory board meetings and strategic planning session
- Further formal and informal industry consultation

Additional innovative approaches include:

- The COEDC's Business Walk program in which the COEDC reaches over 500 local businesses annually, identifying trends, barriers to growth and training needs which are used to guide the COEDC's operational plan and communicated with member municipalities/governments, local post-secondary institutions and community stakeholders to better serve the business community.
- The implementation and facilitation of a Regional Account Management System. Prior to 2016, there was no formalized system to share information between municipalities in the region. The COEDC created a customized Salesforce system to meet specific economic development criteria and provided licenses to municipal Economic Development Officers. The Regional Account Management System facilitates the sharing of industry intelligence, training needs, referrals and expertise, resulting in the increased efficiencies in service delivery throughout the region.

7. SUSTAINABILITY

What measures have you put in place to ensure the continued operation of this initiative?(e.g. staff time, resources, financial)

As a small department with finite resources, the COEDC recognizes best practices and economies of scale by leveraging both financial and human capital resources through successful federal, provincial and community partnerships and alignment of priorities. The COEDC has active partnerships with over 45 community organizations working to promote common goals in the region and successfully leveraged over an additional \$1M in the last 7 years.

In addition, the COEDC regularly evaluates its performance against predetermined key performance indicators and shifts priorities and programming accordingly. By keeping well attuned to industry needs through the COEDC's regular advisory board meetings and programs like Business Walks and Site Visitation, the COEDC ensures that programming is current, effective and sustainable.

9. BEST PRACTICES

How do the processes behind the program/project, and the subsequent results, serve as an example of best practices?

Using the RDCO's strategic priorities and regional growth strategy to guide the overarching framework, the COEDC undertakes significant consultation with stakeholders and industry to formulate priorities and objectives in its Operational Plan. Objectives are addressed with actionable Programs & Tactics, Outcomes and Key Performance Indicators, providing a framework against which the COEDC, the RDCO Board and citizens can evaluate its effectiveness. The COEDC provides quarterly activity reports to the RDCO Board, semi-annual activity assessment reviews and is in regular consultation with industry to ensure programming is effective and current. As a result, the COEDC is the region's primary business resource, fielding 10-15,000 inquiries each year.

As a progressive economic development function, the COEDC is held up as an example of best practices by the Province of BC and has provided consultation in the development of the Province's Performance Measurement Toolkit and created the Business Walks Toolkit promoted by the Ministry of Jobs, Tourism and Skills Training.

Further cementing the COEDC's position as a leader in best practices, the COEDC has been the recipient of many awards in the past 5 years, including:

- 2015 BC Economic Development Association (BCEDA) Community Project of the Year
- 2015 Economic Development Association of Canada (EDAC) Economic Development Achievement of the Year
- 2015 EDAC Marketing Canada Award
- 2013 BCEDA Community Project of the Year – Business Walks
- 2012 BCEDA Economic Development Leader of the Year
- 2011 International Economic Development Council New Media and General Purpose Promotion Awards

10. TRANSFERABILITY

How is this program/project transferable to other local governments?

The cornerstones of the COEDC's Strategic Planning and Community Engagement Process are connection with industry/stakeholders and a focus on accountability through key performance indicators. While economic development is a long term strategy and historically difficult to measure, developing and tracking key metrics allows the COEDC to gauge the effectiveness of its programming and adjust to fit the needs of the evolving regional economy as necessary.

Other communities can emulate the COEDC's success by fostering a consultative relationship with industry and community stakeholders and developing actionable strategies with measurable results. The COEDC Operational Plan is a resource for other communities developing economic development programs. For example, the City of West Kelowna has adopted the COEDC's Operational Plan programming streams and format.

The COEDC Operational Plan is publicly available through its website. Details of its release are made available via press release each year.

11. KNOWLEDGE SHARING

What helpful advice would you share with other communities looking to embark on a similar project?

Engaging industry and stakeholders in a consultative process during the development of an economic development strategy is key to creating innovative, actionable initiatives that meet the needs of the community/industry stakeholders and further regional/provincial/federal strategies. It is important to continue to

engage with industry and stakeholders throughout the year to ensure that strategies continue to align with the state of the industry and provide value to citizens.

In addition to engaging in a consultative process, other economic development agencies can use key performance indicators to assess effectiveness. Determining key performance indicators as part of the development of an operational plan allows for greater accountability in the short term and more effective programming in the long term.

12. TELL US MORE

Please share any other information you think may support your submission.

The 2016 COEDC Operational Plan can be found on the COEDC website:

<http://www.investkelowna.com/resources>