The Forward Focus Process:

RESEARCH AND ANALYSIS

March 2014

FORWARD FOCUS

Accelerating Economic Development in Alberta Communities

This research and analysis document has been prepared as part of the development of the Forward Focus planning process. These planning processes will be used in community and economic work across the province of Alberta.

Alberta Government

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Create **Future Intelligence**™

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1. Introduction to the Forward Focus Process

Forward Focus takes existing tools and weaves the processes together, resulting in a validated Community Economic Strategic Plan, based on sound data, with set priorities that determine the actions for moving forward.

The Entrepreneurship and Regional Development Branch (ERDB), as part of the Alberta Innovation and Advanced Education (IAE) Ministry provides information, tools and pathways to economic development agencies, communities and businesses. This is to enable the support of decisions that encourage growth of local and regional economies.

It had been identified that, while there were a number of tools for communities to access when developing their economic strategic planning needs, there was a need for guidance on how to access, interpret and apply the readily available information. The types of learning were mainly delivered in a stand-alone manner, without any logical thread connecting the processes.

There was a need to create a Facilitation guide, to be utilized by ERDB staff when delivering Forward Focus to the target audience. In September 2013, there was a Forward Focus Trial Run Session, in which the ERDB staff was introduced in a training day to the whole process, as well as the other components. This was useful in order to get input, finalize content and ascertain the timing and pace of the entire process, through a test simulation run with a fictitious town called Any Town, Alberta (the hypothetical community) with the staff members (hypothetical stakeholders.)

The evaluations from this training session highlighted some confusion around a number of the components, and how they could fit together. As a result of this session, the ERDB decided to create this Facilitators Guide, which would guide participants through the process.

Every economic strategic planning process involves a theoretical framework, which evolves from the contextual setting through to implementation phase. While the theoretical framework is constant in the Forward Focus process, economic strategic planning processes differ and vary depending on size of process/area of focus/scope and desired outcome.

The best practice tools for Forward Focus have been identified and described as stand alone tools. It is essential to examine the theoretical framework of strategic economic development planning processes, and incorporate the relevant tools into this framework.

The Economic Strategic Planning Process involves:

- Contextual Setting
- Visioning
- Priority Setting
- Action Planning
- Implementation

The tools, which have been identified, are:

- Regional Economic Indicators
- Economic Dashboard
- Business Vitality Alberta (BVA)
- Future Game – Prairie Canada
- Scenario Planning
- Competitive Advantage
- Measuring Up

2. Contextual Setting

The relationship of context to content is essential in starting a strategic economic planning process. There has to be an understanding of the context and background in the area, in which the planning process is taking place.

2.1 Considering the scale of the community

Choosing the right approach requires having a very clear perspective of the outcome required, and the timeframe in which the outcome is needed. In general terms, the larger the population and the more complex the issue, the longer the engagement process will take. Engagement processes, especially as they expand to include the broader community, take some time to build awareness and momentum. As a general guide, the following table outlines recommended timeframes in a planning process. This is based on practical experience and an understanding of how long it takes for traction to occur within an engagement processes.

Estimated Period of Engagement - based on scale and intensity of engagement
Note: Timeframes are based on total engagement process from initial sessions through to conclusion of any engagement process and compilation of findings. These are identified as 'in-kind hours'.

Size of population	Low intensity	Moderate Intensity	High Intensity
Smaller scale (< 20,000 pop)	1-2 months	2-6 months	6-8 months
Medium scale (20-100,000 pop)	2-4 months	3-8 months	8-18 Months
Larger scale (> 100,000 pop)	4-6 months	6-12 months	12-24 months

Low intensity: Key stakeholder sessions, limited or no engagement with broader public.

Moderate intensity: Key stakeholder sessions, outreach sessions with workshops and expert groups, some limited public engagement through surveys, press releases and web-presence.

High intensity: Full engagement process – including dedicated online engagement, workshops based on sector and demographics, key stakeholder groups, media strategy, input surveys, detailed compilation of results.

2.2 Models of community engagement – pros and cons

Using the previous example of intensity of engagement, the following is an assessment of the pros and cons of each approach. This is a summary of broad levels of intensity of engagement. Each level could have different combinations of methods of engagement locally, depending on the specific situation.

Intensity of engagement	Pro's	Con's
Low intensity Key stakeholder sessions, limited or no engagement with broader public.	• Easy to organize and control the process and outcomes • Fast and inexpensive to do – produces an immediate and useable result	• Unlikely to generate public support or engagement • Limited ability to mobilize community to act on plan – tends to result in a 'plan on the shelf'
Moderate intensity Key stakeholder sessions, outreach sessions with workshops and expert groups, some limited public engagement through surveys, press releases and web-presence	• Gathers robust and expert input • Relatively easy to organize and manage process • Provides some information to public and keeps key players informed • Can be done quickly and gives impression of response in an urgent situation	• While a good informative process, it does not build widespread public support or engagement • Is relatively expensive and requires good public relations skills and resources • Probably only taps into 'usual suspects' and does not reach younger and marginalized groups
High intensity Full engagement process – including dedicated online engagement, workshops based on sector and demographics, key stakeholder groups, media strategy, input surveys, detailed compilation of results	• Produces a very high quality output • Ideal for longer term reshaping of a regional mindset and future • Gives high level of ownership and involvement to the public • Draws in diverse and often neglected sections of the community	• Requires significant dedicated local resources and high attention to detail • May not suit an urgent situation where rapid response is required • Can give the impression of over-analytical and not action focused • Requires local leadership team to deliver on outcomes in a meaningful way as public expectations will be elevated

2.3 Application of Scale to Forward Focus

Smaller Scale The target audience for Forward Focus would be the smaller scale communities (less than 10,000). The table above indicated that this process could take between 1 to 8 months, depending on intensity of engagement.

Medium Scale There are 20 Municipalities in Alberta with populations of between 10 and 50,000. The Forward Focus process is likely to be used by approximately 25% of this group. Therefore, for those 25%, the process should take between 2-18 months, depending on the level of intensity of engagement.

Larger Scale There are approximately 7 Municipalities in Alberta with a population over 50,000-100,000. These municipalities already have well staffed economic development organizations, so it is expected that there will be minimal uptake of Forward Focus by the larger scale communities.

2.4 Tools that can be used during Contextual Setting

The Economic Indicators Tool gives an in depth context to the planning process, by enabling one to access the following information for all regions of Alberta:

- breakdown of population in major municipalities
- demographics including dependency ratio and old age dependency ratio
- labor force characteristics
- agricultural statistics
- energy (regional share of Alberta's oil and gas production)
- income statistics
- investment
- establishments with employees
- accommodation use.

This enables the individual to understand the context and reality (via statistics) of the region in which they are creating a strategic economic plan, to inform the content of the plan.

The Economic Dashboard provides real time access to 26 key indicators for Alberta, which would be applicable to the average stakeholder and business person. Each indicator has its own page, with details on the Indicator statistics (for example: employment figures), changes over time and comparisons with other provinces. The benefits of the Alberta Economic Dashboard is that this is one portal with all relevant statistics for the 26 key indicators, updated in real time and each indicator can be explored in detail, with downloadable formats. The information is pertinent to Alberta, and there are plans to bring the Economic Dashboard down to a regional level in the future.

This enables the individual to access real time statistics, which are completely current, and so will readily inform the content of the planning process. While it is currently pertinent to the Alberta region, when it is brought down to a regional level, it may supplant the Economic Indicators Tool – which is not real time.

The Business Vitality Alberta (BVA) tool helps communities to assess their capacity to work with and support entrepreneurs and to foster small business growth. The BVA measures the perceptions of community leaders, business people and citizens about the current business environment in their community and compares the results to an average of other communities to determine possible short and long-term actions the community can undertake to improve its business friendliness.

The measurement of perceptions of key stakeholders enables the individual to ascertain the context of how stakeholders are thinking about the region, what is the general atmosphere within that region – is it positive/optimistic or negative/pessimistic. How do people see the region in which they are operating?

3. Visioning

A community that undertakes a visioning session is embarking on an important and powerful pathway. The process is an opportunity to create the future and galvanize community members in working towards the fulfillment of this common purpose.

The importance of creating a common vision for a region, community or industry is generally well understood. Community based surveys and research show, that at a simplistic level, people agree that having a common vision is very important and that key decisions should be connected to direction defined by the vision.

While the act of creating a vision for the future, by its nature can be an inspiring experience, it is often done in the context of a crisis or economic upheaval. This is becoming increasingly the case in today's world as the consequences of the global financial meltdown, loss of manufacturing facilities to overseas locations, dramatic shifts in government funding of military complexes, and decline in central government spending. This can result in a turbulent local economic environment and significant local hardship.

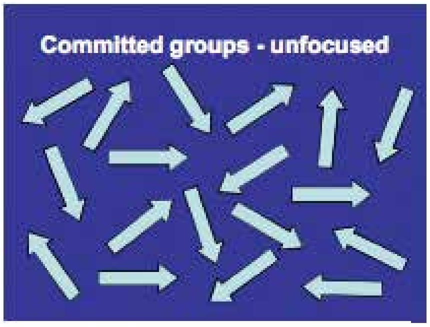
In this contextual environment, it becomes even more important for a regional community to plan carefully for the future, and especially work to apply limited resources with the greatest effect and outcome on the ground. Therefore, having a commonly held vision and view of the future becomes more critical.

3.1 Understanding the power of vision and visioning processes

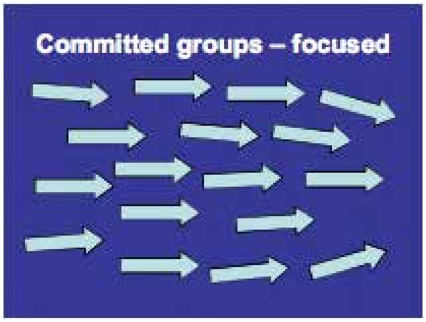
Regions that have undertaken effective visioning work have demonstrated notable changes in:

- increased participation in building the future of the region
- new collaboration and partnerships
- numerous specific and effective projects
- broader agreement and less conflict within the community
- new events, businesses and economic development

How this occurs is a result of fundamental realignment of focus within a region that can be created through the visioning process, and in the subsequent action phases. Many regions contain a number of key organizations and groups, all of which apply resources and efforts to their priority areas. However, rarely do these groups connect to a common regional vision or purpose. In a simplified diagrammatic sense, it could be said that the regional groups can look like the following picture. That is, multiple groups of people taking committed action, but in a manner unconnected to a larger overall picture or direction for the region.



The purpose of a visioning session is to help create a dynamic that is more like the picture represented below. In this case, organizations and groups maintain their own individual identity, but their efforts are linked to a common vision. The visioning process aims to answer the questions of where all the arrows are pointed.



Practical experience from regional visioning work suggests that when groups across a region can connect to a shared vision, then momentum and progress can build in a surprisingly rapid and powerful manner.

3.2 Key principles to shaping a shared vision

While the specific visioning process needs to be designed and defined by the unique situation and intended outcomes, there are some key principles that run across most successful regional processes. These include:

- **Aspirational in nature** – a vision by its nature should be aspirational. That is, it describes a preferred future and is largely devoid of 'fixing a problem' type thinking. It has a quality of inspiration to it that motivates and engages people in action towards something that is meaningful and desirable.
- **Future focused** – the vision that is articulated is at some defined point in the future. Typically regional visioning processes work on a 10-20 year future vision. In some situations a 5-10 year timeframe is appropriate, such as in response to a more

compelling crisis or economic upheaval. This timeframe is aimed to stretch thinking, and take the perspective beyond the immediate timeframe, and its inherent urgent challenges and limitations.

- **Inclusive process** – any successful visioning process will, by its nature, be inclusive. It will aim to include the views and input of numerous stakeholders, groups and perspectives. Current research shows that diverse input and thinking leads to a more creative outcome.
- **Exploratory and holistic** – visioning with diverse groups is ultimately an exploration of common ground. It is holistic in nature, in that it should consider the variables associated with the triple bottom line (economy, society and environment). This ensures that a more total view of the future is built, which can reflect the desires of various interest groups and expertise.
- **Action oriented** – while a vision does not deal specifically with immediate action steps, it should create a compelling case for action, and inspire action. In this regard, a powerful vision and visioning process will result in effective action.

Overall, it is important that visioning should be integrated in a meaningful way in any medium or long-term regional planning process. This means that the visioning should reflect the desires and future thinking of the stakeholders and should guide the subsequent action planning steps.

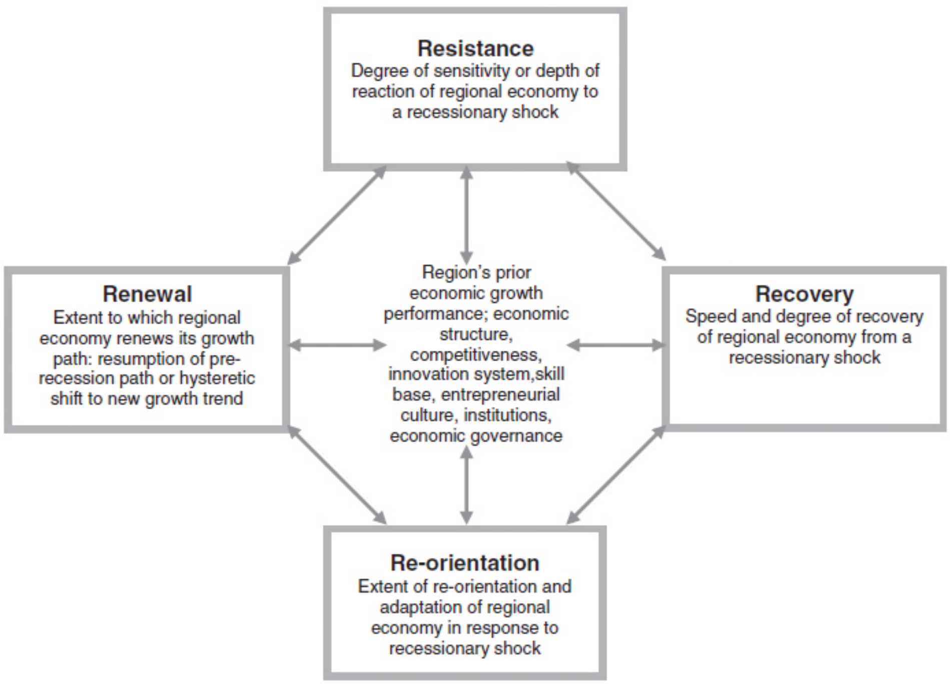
3.3 Current research and trends in visioning

Visioning processes have been evolving over the last several decades. What were once simplistic processes; often involving a small group, have expanded to be more encompassing and longer-term systemic exercises. Visioning processes might have once involved producing a simple aspirational statement that was short and done quickly. The increasing complexity of today's world, and the challenges that environment dictates, has driven visioning processes towards more sophisticated and flexible approaches. In today's environment of uncertainty and volatility, it requires greater consideration of external trends and forces of change, together with more complex desires for community engagement and participatory decision making.

Most current visioning processes aim to engage community stakeholders, business leaders, key organizations and citizens in a meaningful dialogue about how to strengthen and utilize the social, economic and environmental capacity to flourish in light of changing global, national and local conditions. Fundamental to this work, is partnering with the broader community to coalesce around an agreed long-term vision and subsequent strategic plans, and the creation of a system for ongoing community and stakeholder engagement.

Underpinning these trends is recognition of the need to build lasting regional resilience. It is likely that a region will continue to receive economic shocks and changes over time. Building the ability to respond to such changes (and even anticipate and preempt) is increasingly being recognized as critical capacity building to create sustainable regional futures. Current research on regional resilience is helping to redefine the role of visioning processes.

Four Elements of Regional Resilience



By Justin Doran, University College Cork, Ireland 2011

An effective visioning process has a role in building regional resilience, especially in helping regions refocus and speed recovery, but also importantly define the re-orientation and adaptation to new opportunities. As a result, for visioning processes to achieve the greatest success, they are very systemic in nature and both build capacity for change, and fundamentally redefine the focus of the region.

3.4 Tools that can be used during the visioning phase

The Prairie Canada Future Game encourages deep and critical thinking. It pushes the boundaries of the participants' thought process towards future thinking. This hypothetical scenario game enables people to work together in a radically different way. People shift their mindset to one of openness and possibility, as they envision the future 20 years from the start of the game. The focus of this tool, therefore, is the long-term vision, and how to get there. While it is hypothetical, it does create the space to think on a deeper and more future orientated level.

The end point of the game enables a mindset, which is very open to visioning. Using this tool is very useful at the start of a strategic economic planning phase, as it creates an environment of thinking ahead to what type of future is desirable. This can then be applied to the practical planning process.

Scenario Planning is the process from which the Future Game derived. It convenes a large group of local stakeholders, typically between 50 – 300 participants with great diversity of knowledge and experience. The process assesses various future outcomes holistically against the triple bottom line of economic, social and environmental impacts. The process produces a shared vision of the future that can be shared with a broader audience, in order to bridge the gap between the analysis and action.

The key elements include:

- review of important global, national and local trends and identification of key drivers shaping the future
- clustering of critical sets of drivers
- formulation of four different plausible scenario spaces
- developing detailed narratives and descriptions about each of the plausible scenarios
- identifying the preferred future and critical actions steps

This process provides an opportunity for people to produce new insights about the future, and to identify important actions to move a region, community or industry towards a preferred future through the original visioning phase.

Competitive Advantage Training Tool (Step 1: Vision of the Future) This section of the Competitive Advantage Training tool outlines the importance of creating a vision statement, which defines where the community or organization wants to be. It serves as a focal point for analysis, is used to identify needed intelligence and supports the development of appropriate strategies.

4. Priority Setting

Once the contextual setting is identified, and the visioning part of the process completed it is necessary to identify, balance and rank priorities.

It is not possible to work on all aspects of the planning process at the same time, so in effect, it is essential to identify the priorities and work through them in order of importance. This enables the individual or group to identify what their assets are and what they can build upon.

4.1 Tools that can be used during the Priority Setting phase

Competitive Advantage Training Tool (Step 3: Analyzing the Main issues) A vision cannot be realized unless one or more competitive advantages exist. Priority setting involves identification of these current or potential advantages. The Competitive Advantage Training Tool involves three outside subject matter experts to assist the participants to understand and define their competitive advantages. Brainstorming sessions are used, in order for the participants to assess competitive advantages and leverage only the strong ones. Thus, prioritize the advantages.

As the visioning is usually broad, the Competitive Advantage tool uses issue analysis to generate the main ideas for action. Issue analysis breaks down vague or complex issues into manageable components. The process takes this form:

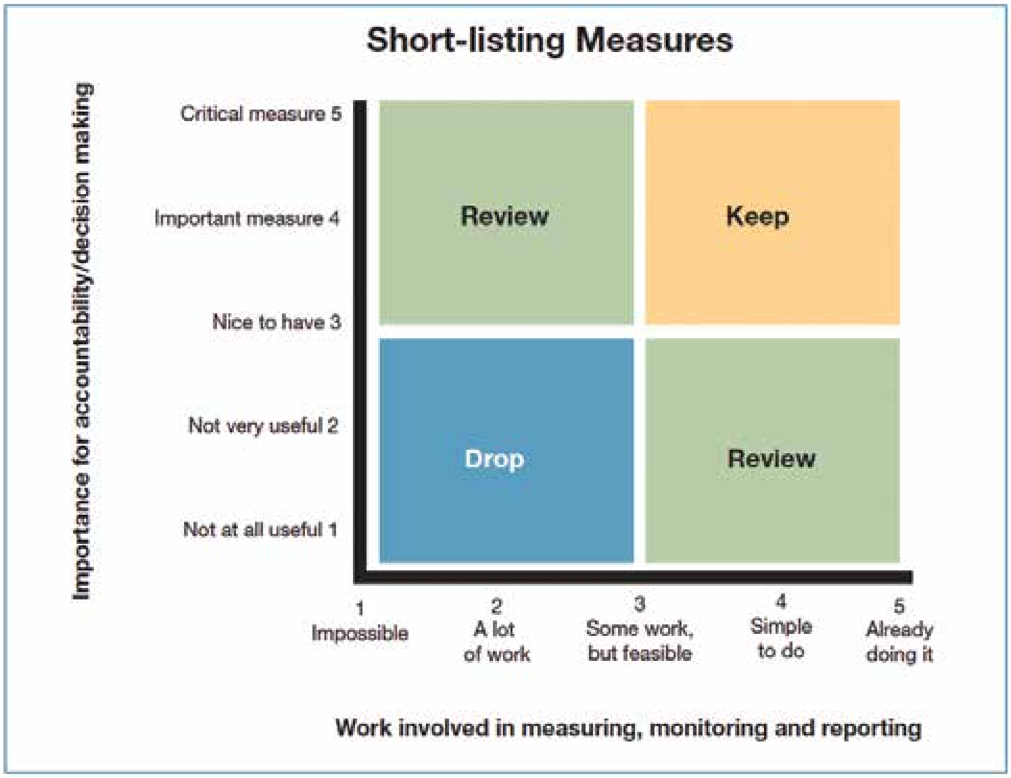
- The issue to be addressed is concisely stated
- The issue is separated into its many component parts through structured brainstorming via 'I wish' statements
- The major themes are then identified, emerging from the brainstorming sessions
- These themes are prioritized into essential, important, of concern and not important
- The themes are ranked in terms of which are most important now
- Three or four themes are identified as the priority themes, and within them, their top needs are established before the Action Plan can be developed.

Measuring Up (Section: Developing your Performance Measurement Framework Measuring Up provides a step-by-step systematic approach to understanding, designing communicating and measuring the performance of economic development activities. While it focuses very strongly on action planning and implementation, it can be used in priority setting – using the matrix below (pg16):

It advocates the identification of the measures for the desired outcomes. These measures could be efficiency (outputs) and/or effectiveness (outcomes). It advocates for the need to decide and prioritize only a few measures. In the beginning stakeholders should be engaged in generating a long list of measures that can be used to track outcome performance. The next step is to prioritize a few measures by using an effort/impact analysis.

4.2 Effort / impact analysis

This can be seen in the diagram below. It illustrates how one can map and decide on which measures to use. It shows how one can select the measures of the highest impact and lowest effort/cost to track. The measures that are expensive to track and do not have high value in reporting are automatically dropped.



5. Action Planning

Having gone through the contextual setting, visioning and priority setting phases in the strategic planning process, action planning is now key. Action planning is the way to make sure that the vision is turned into reality, taking into account context and priority.

The action plan should include the following information:

- what actions or changes will occur
- who will carry out these changes
- when they will take place and for how long
- what resources (i.e., money, staff) are needed to carry out these changes
- communication (who should know what?)

The Action Plan aims to identify a series of discreet and focused actions that can be achieved in a relatively short time frame. In most cases, these actions are intended to be catalytic, such that they provoke new ideas and actions, and begin the process of economic innovation and systemic change within the regional economic systems. Recommendations are targeted to specific local actions that can help steer the region towards the preferred future.

5.1 Tools that can be used in the Action Planning phase

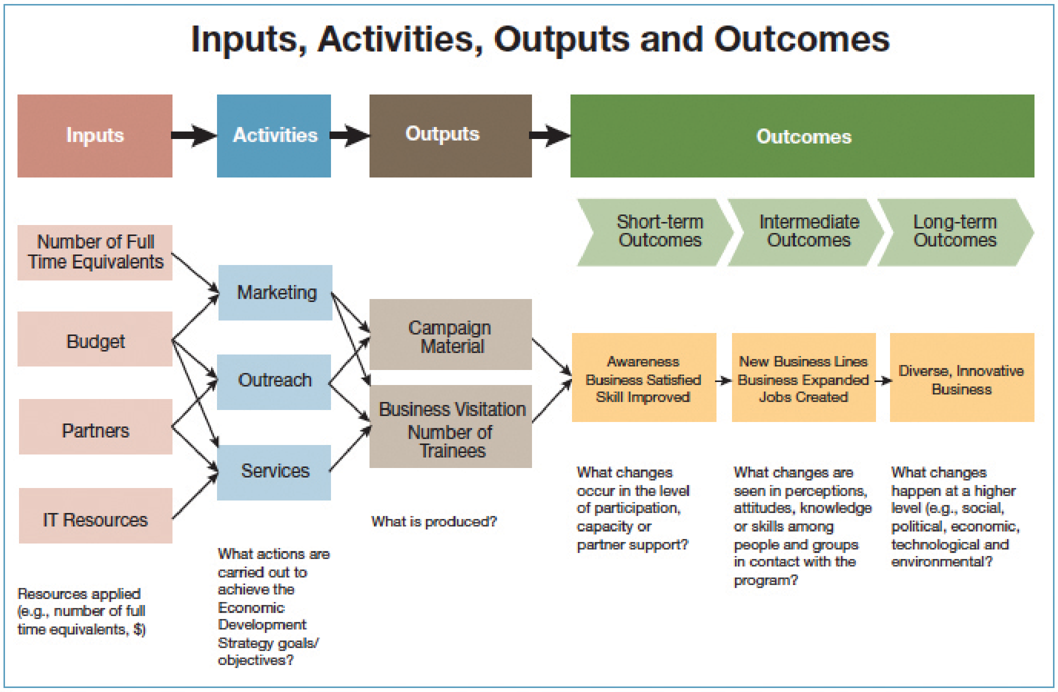
Measuring Up – Identifying inputs, outputs and activities Measuring Up addresses action planning as 'An activity is an action item that requires resources such as people, money or technology. These resources are called inputs. Activities are the actions you take as part of your strategy to achieve your outcomes.' (Pg20) The logic model that Measuring Up advocates is a planning tool, which shows graphically the links between the inputs, the outputs and the results (outcomes). It allows for the testing and ability to ascertain if the correct resources and actions are being allocated to reach both short and long term objectives.

The activities of an economic development strategy could include the following programs, surveys and projects.

- creating a business mentorship program
- developing a tourism marketing strategy
- preparing a survey
- designing a website
- conducting workshops
- delivering training

These are action steps. They are not evidence of either the successful completion of action (outputs) or the success of a plan (reaching outcomes).

The table below highlights Inputs, Activities, Outputs and Outcomes – this shows the relationships among inputs (resources), activities, outputs (products) and outcomes.



The Action Planning phase is shown in the Activity phase.

Competitive Advantage Training Tool (Step 6: Develop an Action Plan) This tool asserts that action planning provides a method for identifying, sequencing and analyzing the activities necessary for the completion of the goal and project. It creates accountabilities, deadlines and the development of ongoing intelligence in order to ensure that the plan remains relevant.

To create the action plan, it is necessary to identify all of the actions required to realize the plan, then identify the controls for the plan – these controls measure the progress of the action plan. It typically indicates who is accountable for each action as well as the deadlines and milestone dates.

Business Vitality Alberta (BVA) – Reality Check BVA recommends that only 2 to 3 follow up actions should be worked upon. These should be short in duration (less than 6 months) and with a minimal use of resources. The BVA Reality Check document is useful at the action planning stage.

Reality Check **1. (Name of Action)**	
Action Group Members:	
Question	**Answer**
Success—Describe what the successful action might look like.	
Purpose – What is the main goal of this action?	
Commitment – Can we get commitment and energy from the town and community to undertake this? If not, what do we have to do?	
Leadership – Who has the skills to lead (organizations, individuals)? Who else do we need to involve to ensure success who isn't in the room right now?	
Time Frame – How long will it take to accomplish? Are there any political, economic or funding factors which might hurt/help the timing?	
Finances/ Resources – What, if any, financial resources do we need to tap into? Are there any organizations that can assist this action? Any other resources?	
Your recommendation	
Next Steps	

6. Implementation and Measurement of Progress

The Implementation phase is the realization and execution of the action plan. This entails setting up action groups and ensuring that the action plan is implemented, through measurement of outcomes. Outcomes should be measurable. A few key performance measures should be identified to track the outcomes and determine whether they have been reached, partially reached or not reached at all. It is not enough to define outcomes. Outcomes must be measurable. Measures are used to assess whether or not outcomes are being achieved and what kinds of changes have occurred. What is measured is determined after the outcomes have been chosen.

If you measure regularly, you can use the information to determine whether your economic development strategic plan is on track or not. Subsequently, if needed, you can change your policies or activities to adjust the direction.

Indicators can be measures, numbers, facts, opinions, or perceptions that help measure progress towards change. Indicators can be qualitative or quantitative.

Qualitative indicators are judgments and perceptions expressed as non-numerical values, such as behaviors, processes and institutional changes.

Quantitative indicators are measures of quantity expressed as a numerical value such as a percentage or size of investment or number of jobs retained. i.e.) Increase in/Decrease in/ Number of/Percentage.

6.1 Tools that can be used in the Implementation phase

Business Vitality Alberta (Section F: 7 Useful Interventions) BVA affirms that the decided upon actions must be realistic and that they need to be persistently kept current. They suggest reporting progress at each group meeting or on a quarterly timeline, in order to maintain accountability and effectiveness. The BVA also highlights seven interventions, which have been noticeably present in many of the projects, which have gone through the Business Vitality Initiative. These are:

- beautify your downtown
- buy Local
- attract tourists
- attract new residents

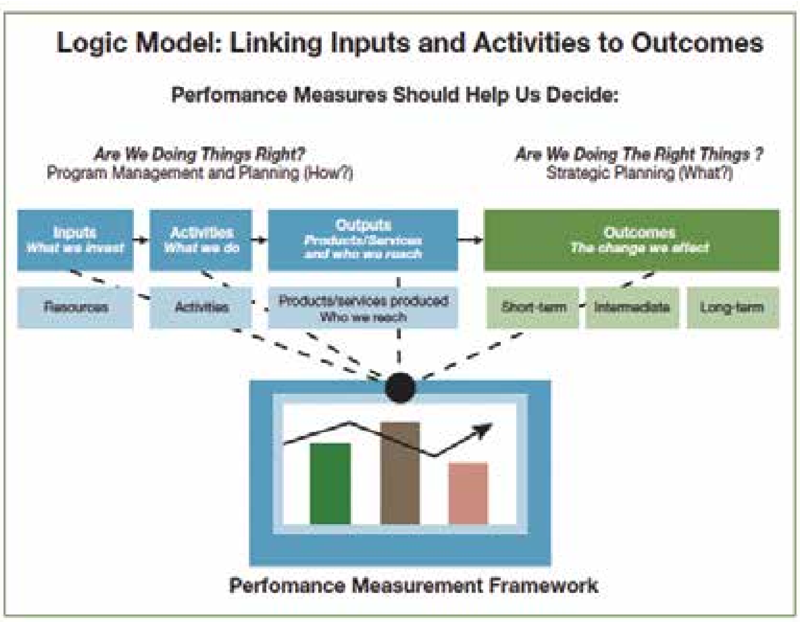
- organize technology and other business forums
- enhance communication
- retain and engage youth with entrepreneurship training

They also suggest keeping four emerging developments in mind, while implementing the action plan:

- the population is aging
- 'local' could include your entire region
- online media is the new word of mouth
- local investing

Measuring Up (Performance Measurement and Outcomes) Measuring Up identifies Performance Measurement and outcomes (Pg. 16) as key in the implementation phase. Recently, economic development organizations have turned their attention to measuring outcomes to demonstrate accountability. For example, has the economic development plan broadened the industrial or commercial base? Has it increased the number of jobs in the region? Increasingly economic development organizations are using a performance measurement framework to monitor and assess the results of their economic development plans.

Logic Model: Linking Inputs and Activities to Outcomes – illustrates the important role a logic model plays in understanding the connection between what we do and what we achieve in the implementation phase.



7. Assessment of identified tools for Forward Focus

7.1 Business Vitality Alberta

The BVA (Business Vitality Alberta) was initiated by a partnership between the Alberta Urban Municipalities Association (AUMA) and the Centre for Innovative and Entrepreneurial Leadership (CIEL). Alberta Agriculture and Rural Development (ARD) have funded the development of BVA. It has been based on CIEL's Business Vitality Initiative (BVI), which has been used widely in communities across Canada and Australia.

The BVA, like the BVI, helps communities to assess their capacity to work with and support entrepreneurs, and to foster small business growth. It measures the perceptions of community leaders, business people and citizens about the current business environment in their community. It then compares the results to an average from other communities to determine the short and long term actions that the community can undertake to improve it's business friendliness.

The BVA has a number of options, which can be chosen, in carrying out the research.

It starts with a survey of 30 questions, based upon perception. In this way, it has been formulated so that anyone can answer these questions. BVA has found that by asking people about their perceptions, the main strengths and weaknesses of a community can be ascertained.

There is a BVA Survey draft, an instructional video as well as an in depth manual to outline the steps throughout the process. Furthermore, there is a sample BVA report outline and a Reality Check Form. This form is to be used at the end of the process to determine the feasibility of each action, and to come up with measures and guidelines.

The first option is to choose whether to survey a working group or to survey the general public (BVA recommends 12 people in the working group). The ideal composition of the working group would be municipal council members and staff, several key business people, business support organizations (e.g. Chamber of Commerce) or other important community stakeholders. To increase the sample size of the survey, it is possible to survey the general public, however the benefits of surveying the working group are efficiency and the groups expert knowledge of the subject matter. The benefits of surveying the general public are a large response volume from a broader cross section of the community.

To survey the working group it is necessary to ascertain and communicate to the group whether they will be involved in the action steps. The survey can be carried out via a paper survey, which can then be tabulated in the formulated BVA spreadsheet (www.auma.ca/live/Toolkits+%26+Initiatives/BusinessVitalityInitiativeTools) or electronically, via Survey Monkey. To survey the general public, the volume of responses is vital. Therefore the survey would need to be publicized extensively.

The tabulation of the paper surveys, via the BVA spreadsheet enables one to evaluate how the community scores on three main areas: Opportunity, Attitude and Networks. The scores can be seen in relation to each question, and in relation to each of these main areas and most interestingly, then compared to the average of 30 Canadian communities who have been involved in the BVI.

Examples of Survey Questions

- Name 3 words, phrases or adjectives that best describe your community.
- What are the 3 greatest strengths/assets of your community?
- What are the 3 underdeveloped business or economic development opportunities in the community or region?

Participants are then asked to rate from Completely Agree through to Completely Disagree with a number of statements about their community, in terms of Opportunities, Attitudes and Networks. These statements include (selected from across the survey, for the purposes of this document):

- We collaborate and cooperate with neighboring communities
- The community offers a supportive financial environment for businesses – e.g. tax burden, cost of & access to capital, cost of labor, etc.
- Infrastructure (real estate, roads, telecommunications, etc.) is adequate for present business needs.

BVA recommends that after reporting the findings to the working group, only 2 to 3 follow up actions should be worked upon. These should be short in duration (less than 6 months) and with a minimal use of resources. The Reality Check document is useful at this stage to measure success.

Finally BVA recommends 7 useful interventions, which have arisen as actions, in many communities who have used the Business Vitality Initiative. These are outlined in the manual, as well as clearly defined within the video, with examples. They are:

- beautify your downtown
- buy local
- attract tourists
- attract new residents
- organize technology forums and other business forums
- enhance communication
- retain and engage youth with entrepreneurship training

BVA recommends that the following 4 aspects are kept in mind:

- the population is aging
- local could include the entire region
- online media is the new word of mouth
- local investing

Relevant Research/Studies In 2012 the Rural Development Division within Alberta Agriculture and Rural Development conducted a Business Vitality Initiative (BVI) Pilot Project. This was conducted in 4 communities across Alberta. The evaluation results from this project showed that:

- 91% felt participation was valuable
- 93% would recommend the BVI to other communities
- 91% felt that the priority actions developed were valuable, 90% thought that they were reasonable and attainable
- 94% have a better understanding of the opportunities for improvement in their community
- 3 of the 4 communities chose priority actions and formed working groups. Of those, 75% agreed that the community has taken steps to advance at least one priority action.

To access the full evaluation Report on the BVI Pilot Project in Alberta:
http://www1.agric.gov.ab.ca/$department/deptdocs.nsf/all/csi12735/$FILE/BVI-Final-Report-Final-Plus-Appendices.pdf

7.2 Prairie Canada Future Game™

The Prairie Canada Future Game™ is a product of Future iQ Partners, derived from a Scenario Planning Process in Alberta in 2009. This process involved approximately 300 people from across the region in a Scenario Planning Workshop, who were asked 'What are the key forces shaping the future of your region?' The scenario planning process ascertained 20 key drivers shaping the future of the region, and then condensed this into two clusters of drivers, which were:

- Responsiveness to the external economy
    - economic decline in USA
    - growth in developing countries
    - economic market volatility
- The ability to capitalize on local resources
    - market access to agriculture
    - renewable energy
    - lack of water
    - need for innovative and entrepreneurial thinking
    - lack of critical infrastructure

These would define the Scenario Spaces, which would display a range of plausible futures for the region. These 4 scenario spaces would make up the Prairie Canada Future Game end point.

The Prairie Canada Future Game is a simulation tool, which addresses common concerns – such as the global trends, which are impacting the future of the region. It enables people to practice decision making and leadership for their region. While it is a hypothetical tool, it uses the areas of Alberta, Saskatchewan and Manitoba within the materials.

The Prairie Canada Future Game follows an 18 year future, starting in year 1. There are critical decisions to be made at year 1, 2, 5, 10 and the game finishes in year 20.

The participants, who are in groups of 5, start with the year 1 Base Map, in this map, the participants are shown a region with 3 local government units, 3 towns – which include a starting population and icons of the services in each town. The scale of the region, in the map is 100km x 60km.

The participants are also given a Legend – which they will use throughout the process. The Legend outlines the different types of land use, it shows the icons, which will be used on each map (different businesses, map lines, features and symbols of services in each town).

The participants are then brought through a process of decision making through the years 2, 5, 10 via the Decision Sheet and Big Event Cards.

The Big Event Cards show the global trends, which are happening during that year in which the participants need to make a decision. These trends could be national or international. These Big Event cards provide a wider context for the decision making during the process.

The Decision Sheet is given at each point, and it will differ depending on the choices that the participants made in each round. The Decision sheet gives the group a critical decision, in which they have to make the decision A or B.

For Example: 'Oil and Gas prices surge due to global instability, oil hits $200 a barrel. The region gets a $50 million windfall sale from a local government owned utility company."

The Groups are then asked to choose from two options:

A: Divide the funds on a per capita basis, between the local governments for use on local infrastructures and community enhancement projects.

B: Use the funds to create a regional investment fund, managed by 'Golden Valley Council' to help develop and secure new projects in renewable energy and broadband development.

The Decision Sheet requires that the group select A or B, and also how many were for/against the decision. At the bottom of the Decision Sheet there is a table, regarding how important the triple bottom line was to the group's decision making: Environment, Economy and Society.

The process of the Game ensures that there are 10 minutes given for each critical decision. The participants are encouraged to review each new map, and debate the new decision sheet which they receive as they make their different decisions during each part of the game.

At the end point of the Game, the groups are given new maps for year 20 and also, they determine where they have ended up within the 4 scenario spaces, originated from the Scenario planning event held in the region.

The Prairie Canada Future Game is useful for municipal politicians and officials, community leaders, local economic development practitioners and organizations, regional economic development alliance members as well as community development organizations. It is a technology, which has been used across the world, including Europe and Australia.

The scope of the game is to encourage deep thinking and critical thinking. It pushes the boundaries of the participants' thought process to future thinking. It is useful for strategic planning sessions, board and staff retreats, community conferences and events and staff team building exercises. It enables leaders to work with their teams in a new way. How today's decisions impact tomorrow's future, and the future 20 years from tomorrow is the key to this tool. The focus of this tool is the long term vision, and how to get there. While it is described 'The Prairie Canada Future Game', it is a serious game, which engages debate about the future of the community/region and adds extra depth to planning efforts.

Relevant Research/Studies David Beurle, CEO of Future iQ Partners created the Future Game, and the Prairie Canada Future Game is one of six versions which have been developed. This tool emerged from the theory and practice of Scenario Planning and was designed to present scenarios at a reduced temporal and spatial scale, while adding the extra dimensions of participation by groups in decision making and the immediate representation of the implication of their decision making.

'The Futures Game: A Scenario Game Workshop Package to Engage Futures Thinking', by Beurle, O'Connor and Fisher in The International Journal of Environmental, Cultural, Economic and Social Sustainability (2009)

http://www.future-iq.com/downloads/resources/restricted/the-futures-game-cg-paper-09.pdf

7.3 Economic Indicators

The Economic Indicators tool is a feature on the www.albertacanada.com website. It was last updated in this format in March 2012. It gives in depth information about the following regions in Alberta:

- Battle River
- Calgary
- Capital
- Central
- Mackenzie

- North Central
- North East
- Palliser
- Peace County
- Slave Lake
- South Central
- South West
- West Yellowhead
- Wood Buffalo

The website shows a map of the Alberta area, with each region highlighted in a different color. This is an easy way to access that particular region and the in depth information about that region. There is also a list on the left hand side of the page, with each region listed.

On entering the Region on the website, there is a large amount of in depth information, mainly taken from the Census (2006).

The subheadings per region are:

Region at a glance This section gives an overview of the Region's geographical information including size of the region, percentage of Alberta's land mass, population figures and the percentage of Alberta's population. In addition, this section gives information about the largest industry in the region, based on employment figures as well as the fastest growing industries in the region. Average income for the region is also highlighted, as well as the impacts to the region of the global economic crisis.

Major municipalities This section givers a further breakdown of the population by the municipalities in the region, based on Census material for 2006.

Demographics This section outlines the population of the region, according to the last Census figures of 2006. It also gives a percentage of the total Alberta population. Dependency ratio and old age dependency ratios are also ascertained, with under coverage problems of the Census estimates outlined. NB: Dependency ratios are the percentage of the population below the age of 15(Child) and over the age of 64 (Elderly) divided by the number of adults (15-64). This is the population of children and elderly who are dependent on the adult population for economic needs. The Old Age Dependency Ratio is the percentage of the population over the age of 64 (Elderly) divided by the number of adults (15-64). This is the population that is dependent on the adult population for economic needs. The Under Coverage problems of the Census highlights that although the Census provides the most detailed and accurate information at a single point in time on the demographic, social and economic conditions of the population, the Census under-estimates the overall population totals for any region as some people are not counted. The reasons for this under-coverage can range from some households not receiving a census questionnaire to individuals not being included in the questionnaire completed for a household

Labor force characteristics Based on Statistics Canada's Labor Force Survey (LFS), the region's employment rate for the working age population of 15 years and older is given in 2010. The region's unemployment rate trajectory is tracked, in comparison with the general trajectory of the unemployment rate for Alberta. The employment rate per industry in the region is also noted in this section.

Agriculture This section uses information from Statistics Canada (2011 and 2006). It gives a breakdown per region of the numbers of farms, average farm size (acres), number of farm operators, number of farm employees, gross farm receipts, breakdown of crops and acreage and breakdown of livestock. The statistics for 2011 and 2006 are giving the percentage change between those years, in comparison to the percentage change in Alberta.

Energy The region's share of Alberta's oil and gas production and the increase/decrease from 2004-2011 is examined in this section. The annual average oil and gas prices are given, with the region's position as oil producing region in Alberta. The number of spudded wells (the very beginning of a drilling operation for a well) are analyzed between the years 2004-2011 for the region.

Income/Tax filer Using Alberta Finance and Enterprise statistics, the average individual income in the region is given from 2003 – 2007. The average couple's income is also given for this time period. The percentage of tax filers that reported an individual and couple's gross income over $100,000 is recorded, for that same period.

Investment The total building permit values in the region are outlined in this section. These are broken down into institutional, industrial, commercial, residential and the percentage of the Alberta total of building permits. The housing starts between 2009 and 2010 are analyzed. The housing start information is gathered by Canada Mortgage and Housing Commission field offices; building permit estimates are gathered by Statistics Canada from municipalities. A building permit generally precedes the house start.

Establishments with employees The numbers of establishments in the region, with employees between the years 2005 and 2010 are analyzed, from figures sourced by Canada Business Patterns/Statistics Canada. The percentage of established small businesses, micro businesses and large companies are given with the comparison at the provincial level. There is a breakdown of number of employees given within the Goods Industries and Service Industries between those years. Goods Industries include: Agriculture and Forestry, Mining Gas and Oil Extraction, Utilities and Construction and Manufacturing. Service Industries include: Wholesale trade, Retail trade, Transportation/Warehousing, Information Culture and Arts, Finance Insurance and Real Estate, Scientific and Technical services, Administrative and Waste Management services, Educational, Health care and Social Assistance, Food and Accommodation and Public Administration services.

Inventory of major projects The number of major projects proposed, planned, under construction or recently completed in the region by March 31, 2011 are recorded. These statistics are sourced from Alberta Finance and Enterprise, Inventory of Major Alberta Projects. The total value of the projects in 2010 and 2011 are recorded and the spread of the projects across the following sectors: Biofuels, Chemicals and Petrochemicals, Infrastructure, Institutions, Other Industry, Power and Residential and Tourism. The regional share of the provincial total is also shown.

Accommodation Use Using figures sourced from Alberta Tourism, Parks and Recreation the number of rooms in the region are analyzed for the year 2008/2009. The percentage of all available rooms in Alberta is presented, with occupancy rate and source of demand (industrial crews/business/tourism/tour and conventions/other)

NB: There is another sub section, which covers the Aboriginal Population. This is taken from source material from the Indian and Northern Affairs, Canada – Alberta Municipal Affairs. The number of registered aboriginal people are analyzed, with a breakdown of those who live on Reserves or Crown Lands. The percentage making up the overall region is also recorded. This section is only included in the following regions: Calgary, Capital, Central, Mackenzie, North East, Peace County, Slave Lake, South Central, South West, West Yellowhead and Wood Buffalo. This section is not included in the Battle River, North Central or Palliser Regional breakdowns.

In 2013, this form of analysis changed to become the new ‘Land use regional economic indicators’. While the information presented in this document has remained on the website, the regions have been changed to:

- Lower Peace
- Upper Peace
- Lower Athabasca
- Upper Athabasca
- North Saskatchewan
- South Saskatchewan
- Red Deer

Rather than the in depth regional economic sub headings which were used until 2013, there is a breakdown for each area into the following:

Inventory of Major Alberta Projects (PDF) This document outlines the number of projects proposed, planned and under construction in each region. The total value of the projects are recorded, with percentage of total Alberta Projects. (Source: Alberta Enterprise and Advanced Education – Inventory of Major Alberta Projects)

Business Registry (PDF) The number of establishments with employees, by industry type and size are recorded. (Source Canadian Business Patterns – Statistics Canada.)

Investment (PDF) The total value of building permits in comparison to the Provincial total are recorded between the years of 2007 – 2012. (Source: Statistics Canada, compiled by Alberta Enterprise and Advanced Education)

Relevant Research/Studies Highlights of the Alberta Economy 2013 (GOA – Alberta Enterprise and Advanced Education) is a report and presentation which outlines the Economic situation in Alberta in 2013.

To access this report:
https://albertacanada.com/files/albertacanada/SP-EH_highlightsABEconomyPresentation.pdf

7.4 Competitive Advantage Training Tool

The Competitive Advantage Training tool is outlined in the article, 'Regional and Community Economic Development Planning: An Exciting Role for Competitive Intelligence'. This article was written by Calof, Marcoux and Robinson. They start their article by outlining that 'Making better decisions is at the heart of competitive intelligence (CI) and that the role of intelligence is to help organizations develop and maintain a competitive advantage' This intelligence assists those organizations to develop a proactive approach that quickly identifies and responds to increased competition and environmental change. As the information needed for creating intelligence already exists within an organization, it is essential that the company acts on the need to integrate this information throughout the organization in order to increase its competitiveness.

As Hogg and Dunn outlined in 1982, 'A small town can strengthen its local economy as a result of business people and concerned citizens collectively identifying that community's uniqueness and then capitalizing upon it'. Thus the main tenets of competitive intelligence are:

- The need to integrate environmental information throughout an organization/community
- The application of analytical techniques to build and maintain competitive advantage

Calof, Marcoux and Robinson developed a program entitled, '**Control your destiny or someone else will**' This applies the concepts outlined above to successfully help small Canadian communities and regions to harness the knowledge within their own communities to develop the intelligence needed to create competitive advantage.

This program provides community leaders with the skills needed to create an economic development plan for their own future. This is preferable to having a plan imposed upon them. The benefits of this program are that the community leaders have the knowledge of their community's true competitive advantage, the problems faced and the limitations to growth. Their active participation in developing the economic development plan strongly influences its likelihood for success, as they will be the individuals implementing the plan. It uses three elements to help these communities to create their own economic development plans:

Process Facilitation/Competitive Advantage/Competitive Intelligence

- the participants are challenged to develop a series of action plans which result in the implementation of the community's key decisions and investment needs
- three outside subject matter experts assist them to develop the necessary knowledge and transfer the skills to successfully complete the program. These experts represent the three key elements outlined above
- the final program output is an economic development plan which contains clearly identified priorities, the decisions required to generate community support and individually assigned action items to move the program towards completion

How is this implemented?

Vision for the Future A vision statement defines where the community wants to be, in broad language. It serves as the focal point of analysis.

Competitive Advantage The vision cannot be realized unless one or more competitive advantages exist. This phase involves identification of these current or potential advantages. The subject matter experts help the participants understand and define their competitive advantages. Brainstorming sessions are useful at this stage, in order for the participants to understand how to assess competitive advantages and how to leverage only the strong advantages.

Analyzing the Main Issues This is about implementation of the vision. As the vision is broad, the issue analysis generates ideas for action. Issue analysis breaks down vague or complex issues into manageable components:

- the issue to be address is concisely stated
- the issue is separated into its many component parts through structured brainstorming via 'I wish' statements
- the major themes are then identified, emerging from the brainstorming sessions
- these themes are prioritized into essential, important, of concern and not important
- the themes are ranked in terms of which are most important now
- three or four themes are identified as the priority themes, and within them their top needs are established. These prioritized themes are known as Key Result Areas (KRAs) e.g.: Marketing KRA Objective: To bring the people here and have them want to stay by: attraction through tourism/promotion of quality of life to targeted groups/attracting new businesses and new jobs in established businesses.
- participants then volunteer to work on the objectives and goals for a specific KRA group, and develop the action plans to make these goals happen

Develop Competitive Intelligence In competitive intelligence the outside environmental influencers are identified. These are called Key Intelligence Topics (KIT). The environment affects to some degree, the production of appropriate plans, strategies and action plans. Competitive intelligence identifies whether the KRA (Key Result Area) is sound (e.g. is the market attractive/is there sufficient demand?). It also identifies the issues related to implementation of the KRA (e.g. what will be the objections encountered in 'selling' the idea/ what are the risks involved in implementing the KRA/what issues need to be considered in designing and implementing the KRA – thus, stakeholder analysis/risk analysis and issue analysis). A three-phased approach applies competitive intelligence to analyze the external environmental influences.

1. Participants go through all of the KRAs, and identify the environmental elements that can affect achieving their objectives. e.g. what outside factors can affect their plans?
2. Participants attend an Introduction to Competitive Intelligence workshop, in order to learn the basics of competitive intelligence and decision orientation. This workshop covers: i) Understanding what information requirements support the KIT. ii) Setting up of a time frame for the effort iii) Integration of intelligence information collected through networks and sources iv) Insight created through analysis.
3. Participants finally review their key result areas and develop detailed intelligence plans for each of them.

Developing an Action Plan and Presentation of the results Action planning provides a method for identifying, sequencing and analyzing the activities necessary for completion of the goal and project. It creates accountabilities, deadlines and the development of ongoing intelligence in order to ensure that the plan remains relevant. To create the action plan, it is necessary to identify all of the actions required to realize the plan. Then it is necessary to identify the controls for the plan – these controls measure the progress of the action plan. It typically indicates who is accountable for each action as well as the deadlines and milestone dates. Finally, it is very important to present the results via a presentation.

7.5 Measuring Up – Performance Measurement

The Economic Developers' Council of Canada (EDAC) Board of Directors, through consultation with EDAC's professional economic development members across Canada, identified the development of performance measures as one of the key components of the economic development process which needed more study, guidance and resources. This led to the EDAC Report, entitled 'Performance Measurement in Economic Development of Performance Measurement Systems for Local and Regional Economic Development Organizations (2011)

The Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA) works with communities and organizations to strengthen Ontario's regional economies and create an enabling environment for clients to attract jobs and investments. In 2013, OMAFRA built upon the work that had already been done by the EDAC report in 2011, to create the 'Measuring Up! Performance Measurement for Economic Development Guidebook'. The foundation piece of this work included a local, national and international literature review on performance measurement in economic development; a jurisdictional scan in Ontario for local and regional economic development strategies; a web survey of economic development officers who identified the need for resources; one-on-one and phone interviews; and focus groups with economic development officers in eastern, south-western and northern Ontario.

The Measuring Up Guidebook provides a step-by-step systematic approach to understanding, designing, communicating and measuring the performance of economic development activities. It was developed to enhance a common understanding about performance measurement by building consistency in terminology, agreed-upon process requirements and clear guidelines. The Guidebook introduces both concepts and technicalities of performance measurement. It also provides the user with a case scenario and templates to support the development of a performance measurement framework.

In the past many economic and regional development organizations have tracked the success of their efforts using output measures such as the number of industrial contacts made or assisted, the number of meetings held or presentations made, the number of information packets or brochures distributed, the number of trade shows attended and similar measures of activity. More recently, economic development organizations and officials have turned their attention to measuring outcomes to demonstrate accountability. For example, has the economic development plan broadened the industrial or commercial base? Has it increased the number of jobs in the region? Has it had the desired effect? Increasingly, economic development officials are using a performance measurement framework to monitor and assess the results of their economic development plans.

There are four sections to the Guidebook, which:

1. Describes what performance measurement is and why it is important.
2. Discusses briefly the shifting focus of economic development and gives a context to performance measurement in economic development.
3. Provides a step-by-step systematic approach to putting performance measurement into action.
4. Gives examples that illustrate how performance measurement in economic development can be implemented in local and regional areas.

Section 1: Performance Measurement – an overview This section explores the concept of Performance Measurement and distinguishes it from Performance Management. It conveys how performance management refers to the day-to-day business processes and actions that lead to meeting an organization's strategic goals. However, performance measurement is the process of collecting, assessing and reporting on data in order to evaluate progress towards a desired outcome or objective. It goes into further detail, explaining how performance measurement:

- allows the assessment of strategy and the gaining of insight into how to improve organizational practices
- enables the case to be made for strategies and activities to maximize resources in a more systematic way.
- increases accountability by demonstrating the effectiveness and value of plans/ outcomes by achieving desired outcomes.
- informs decision making, budget making and resource allocation in a competitive environment for resources
- helps document change occurring over time
- encourages buy in from stakeholders

The Guidebook explains how Performance Measurement can be used by different stakeholders, for different purposes:

- economic development practitioners can use it to support continuous improvement of economic development activities and for resource allocation decisions
- internal users such as economic development committee members, municipal staff and elected officials can use this to assist them in making decisions on strategic planning priorities and budgets.
- external users – such as businesses, funders and citizens may use this information to gain understanding of economic development accomplishments.

This first section outlines the four steps to developing a performance measurement framework, and it is clear that all 4 steps need to be followed to maximize the potential of this framework.

A. Assess, revisit or initiate the economic development strategic plan The first step in developing a performance measurement framework is to review the economic development strategic plan. Analyze it and check the logic between its components, e.g., vision, goals and desired outcomes. Are the desired outcomes realistic when the municipality's or region's existing assets and the available resources are taken into account? Are the plans and activities aligned with the desired outcomes?

B. Build consensus and maximize engagement Stakeholder engagement should not be done in isolation, or be limited to one time only. It has to be part of all the steps in developing the framework to make sure there is the necessary buy in, the support and the accountability of stakeholders throughout the process. Decisions also need to be made about who is going to be responsible for the different parts of the economic development plan, which includes the Performance Measurement framework. Who is going to be accountable for reporting on performance, and for collecting and analyzing performance data?

C. Create a logic model A logic model is a planning tool that shows graphically the links between the inputs, outputs and results (outcomes) of economic development plans. It allows for the testing and ability to see if the right resources and actions are being allocated to reach both short and long term objectives.

D. Develop the performance measurement framework A performance measurement framework is a continuous process. The framework should include data collection tools and processes that enable the testing, measuring and adjusting as the economic development plan is put into place. Performance measurement is not static. It is a process that includes planning, measuring, reporting and adjusting if needed.

Section 2: The changing face of Economic Development This section describes the move within economic development from the more traditional model, which focused on attracting investment through recruiting outside industry to a more recent focus on innovation, and the identification of new sources of local and regional competitive advantage. Economic development efforts are becoming more directed towards developing entrepreneurial skills, attracting value-added industries, creating niche tourism and encouraging creativity and talent.

It also describes how regions are becoming more prominent, as the key economic unit, as the economic development landscape changes. Collaboration is key in this shift from the traditional to the more innovative.

Section 3: Putting Performance Measurement into Action This section teases out in more detail steps A, B, C and D. It highlights the role of team work, leadership, outside expertise and linking the activities to the outcomes. With an exploration of the Logic Model, mentioned in section 1, this section takes the premise of the four steps in Performance Measurement and expands it.

Finally it explains the Three Phrases to a Performance Management Framework.

- **Planning**: Engagement of an analyst or staff member who is familiar with the process of collecting and reporting on performance data. Decide on a methodology which measures the inputs and outcomes. Identify measures for the outcomes and engage stakeholders to generate a list which can be used to track outcome performance. Decide on targets and who is accountable for measuring outcomes.
- **Measuring**: Collecting performance data in the implementation phase through to and beyond the results phase. The closest performance data related to and reflecting implementation are usually the immediate outcomes. As the measurement process goes further from the implementation, mid-term and long-term outcomes are captured. Check and monitor the performance against the targets. Take corrective action to stay on track if needed.
- **Reporting**: Employ the performance data to monitor the strategic plan and to ascertain if it is achieving the desired outcomes. Use the performance data to rethink some activities or to change tactics if the desired outcomes are not being achieved or if different but favorable outcomes are reached. Collect data regularly – monthly, quarterly, semi-annually or annually. Performance reports are very important and should be tailored for the different audiences i.e.) stakeholders, funders, etc.

An important part of the process is the communication of progress and success in reaching outcomes. This is an essential component in the performance measurement framework. It builds trust in the economic development activities, helps secure future support and strengthens partnerships with stakeholders.

The remainder of this section outlines in depth:

- short, medium and long term outcomes
- selecting performance measures
- the SMART model
- allocating and collecting data
- attribution
- reporting

Section 4: Performance Measurement Scenarios This final section gives a number of hypothetical scenarios, based on the ABCD process which was outlined in Section 1 and expanded upon in Section 2. They are designed to review this process based on economic development plans for a local community and for that community as one of several communities contributing to a regional economic development strategy. These scenarios are interactive and demonstrate the systematic approach required in developing a performance measurement framework. This section ties in the theory with examples.

Relevant Research/Studies The Measuring Up initiative was presented at the EDCO 56th Annual Conference, London Ontario in February 6, 2013

8. Additional initiatives to contribute to the Facilitators Guide Book

8.1 Linking Best Practices to the Prairie Canada Future Game

There are two additional initiatives which have been identified as tools to use within Forward Focus:

These are:

- Linking Best Practices to the Prairie Canada Future Game.
  - A review of the Prairie Canada Future Game identifying linkages with the ERDB's Best Practices Tool Kit; incorporating relevant economic development practices into a new add-on debriefing module
  - ERDB Best Practices Tool Kit http://eae.alberta.ca/apps/econ-toolkit/best-practices.asp
- Economic Dashboard (interactive charts, downloadable data and real-time updates, replacing the longstanding Monthly Economic Review publication) http://www.economicdashboard.albertacanada.com

Linking Best Practices to the Prairie Canada Future Game. There is currently work being carried out to identify linkages between the Prairie Canada Future Game and the ERDB Best Practices Tool Kit.

This will involve taking best practice case studies from Alberta, and linking them to critical choices on the Decision Tree at the end of the Prairie Canada Future Game. This will combine simulation learning with identified best practices which are being carried out in the region. This will lend authenticity to the experience of playing the Game, as it will provide an example of where a similar critical decision (in the Decision Tree) was played out in real life and led to a best practice case study. This will provide one solution to one of the issues raised about the experience of playing the Prairie Canada Future Game, which is 'what is the follow up from this simulation experience?'

In March 2014, the Best Practice Tool Kit will be merged with the Prairie Canada Future Game – this will combine 16 different Economic Development tactics with the Game, which will be further highlighted by the Case Studies. The ERDB Best Practices Tool kit, and the 16 Economic Development tactics can be seen below:

8.2 Economic Dashboard

The Alberta Economic Dashboard had been developed over 16 months, and was released in December 2013. The reason for the development of this highly interactive and real-time component was to replace the Monthly Economic Review.

The Monthly Economic review was formed in the 1970s, and produced statistics on Alberta in a number of key economic areas on a monthly basis in a static format, via magazine. The disadvantage of this format was that statistics change rapidly and so the statistics would be quickly out of date, and not time sensitive. It was time to modernize this format, and the Alberta Economic Dashboard was created to fulfill upon this.

The Alberta Economic Dashboard provides real time access to 26 key indicators for Alberta, which would be applicable to the average stakeholder and businessperson. Each indicator has its own page, with details on the indicator statistics (for example: Employment figures), changes over time and comparisons with other provinces. The benefits of the Alberta Economic Dashboard is that this is one portal with all relevant statistics for the 26 key indicators, updated in real time and each indicator can be explored in detail, with downloadable formats.

The information is pertinent to Alberta, and there are plans to bring the Economic Dashboard down to a regional level in the future.

Karen Wronko (IAE) and Michael Parkatti, (IAE) outlined the Economic Dashboard during a webinar on December 2nd, amongst other data collection methods. The summary from the webinar showed that 96% of 45 participants responded that they would use the Economic Dashboard.

9. Strengths and Weaknesses - Assessment by IAE staff

9.1 Strengths and Weaknesses ascertained from research

The following table is a combination of the findings from the analysis of the components, with additions of points made by IAE staff (on the Regional Economic Indicators and Prairie Canada Future Game components) Further analysis of the results of a survey with the EAE staff will be incorporated after this table.

Component	Strengths	Weaknesses
Business Vitality Alberta (BVA)	• Can be completed without outside facilitation or expertise • Custom built for rural Alberta communities with input from AUMA and CIEL • Allows for comparison with other Canadian communities • Easy to use tool with 12min online video, simple survey and easy to follow manual • Easy to use scoring grid/spreadsheet • Builds strong connections amongst municipal government and small business	• Not so much assistance from tool if surveying the general population rather than working group

Prairie Canada Future Game	• Hypothetical, but in a geographical context which is familiar • It is a 'serious game' so there is nothing to lose in playing the game and making key decisions • It brings everyone onto a level playing field – from CEO to other members of team • It is easy to use with step by step instructions by video and facilitator • It is fast paced and enjoyable to play • There is an a ha moment during the game for everyone • The final conclusions bring people to a different thinking space, from which action can occur	• While the game is enjoyable, there is no place to take people past the end point of the Game.
Regional Economic Indicators	• Easily accessible on the website • In depth statistics across a range of regions and economic areas	• Statistics are not standardized with regard to years/time. Therefore, difficult to compare. • Change of format in 2013, which changes the regions and the analysis areas. This gives less rich information for each region, as less economic areas are analyzed. • Lack of comprehension by users regarding what the statistics mean to a community • Lack of interpretation and analysis with these statistics • Communities need statistics specific to their town. The scope is too broad

Competitive Advantage Tool	• In depth procedure of arriving at action plan, from original vision.	• Complex procedure which may generate confusion. • Too much theoretical information and less task orientated in its presentation. • Terminology confusing
Measuring Up Guidebook	• In depth analysis and framework of Performance Measurement • Relevant to where economic development is now – regarding performance and outcomes • Step by Step and easy to understand • Consolidates common terms and definitions • Creates a common platform that will help align economic development (regionally and locally) • A step-by-step systematic process supported by scenarios and templates.	

9.2 Survey Results from Innovation and Advanced Education staff

A survey was carried out using an online survey tool on January 15th 2014, with the 12 North and South Unit Regional Managers and Project Officers from Innovation and Advanced Education. This survey was carried out to assess the effectiveness of the tools, which are currently being used by the staff. The tools being used are the Prairie Canada Future Game and the Regional Economic Indicators. The respondent rate was 100% with all 12 completing the survey.

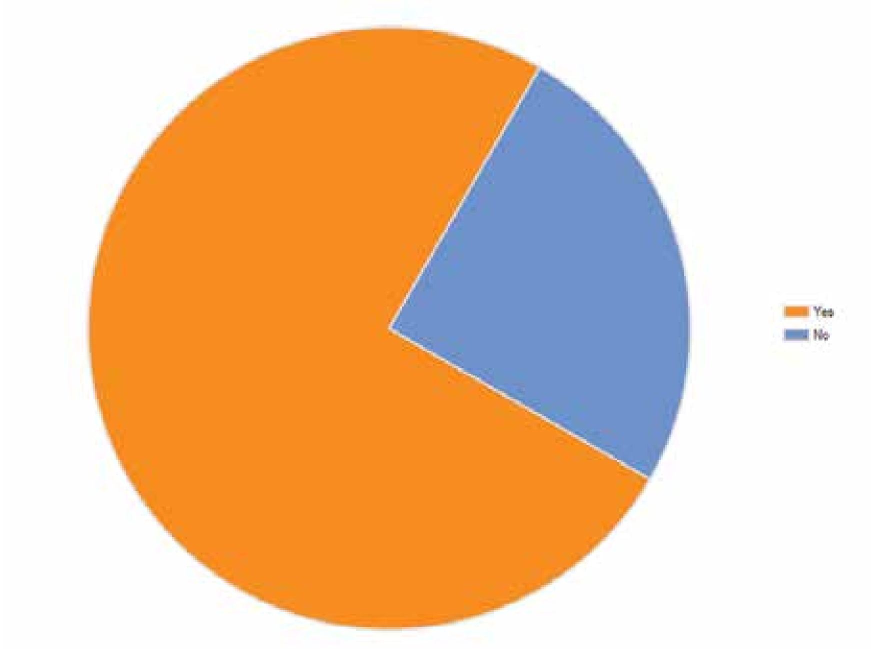
The survey was designed to obtain information and feedback on the use of the Prairie Canada Future Game and the Regional Economic Indicators. Finally the staff were asked about the integration of the tools.

This provided rich feedback both in a quantitative and qualitative combination. The disadvantages were that there was a small sample size, only two tools were being used and not all of the staff were using the tools.

Survey Results

1. **Do you use the Prairie Canada Future Game in your work**

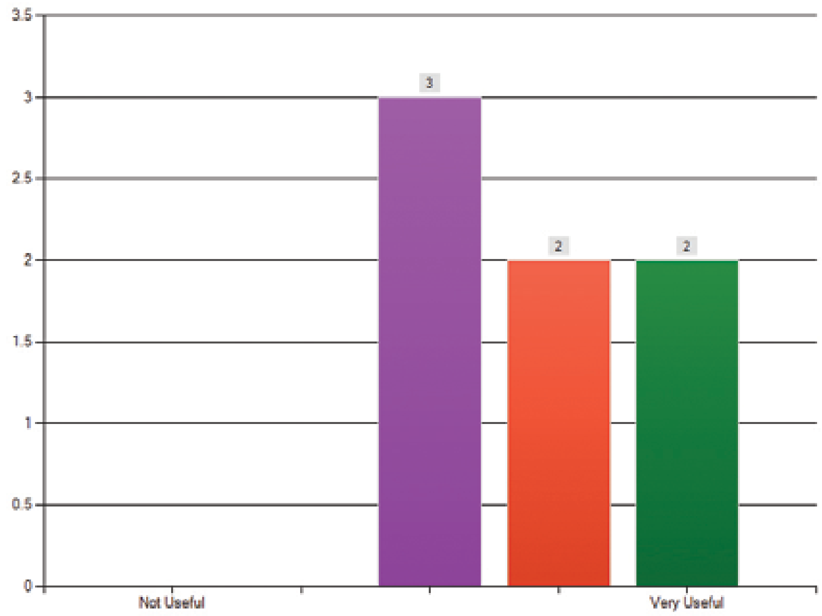
75% of those surveyed used the Prairie Canada Future Game.



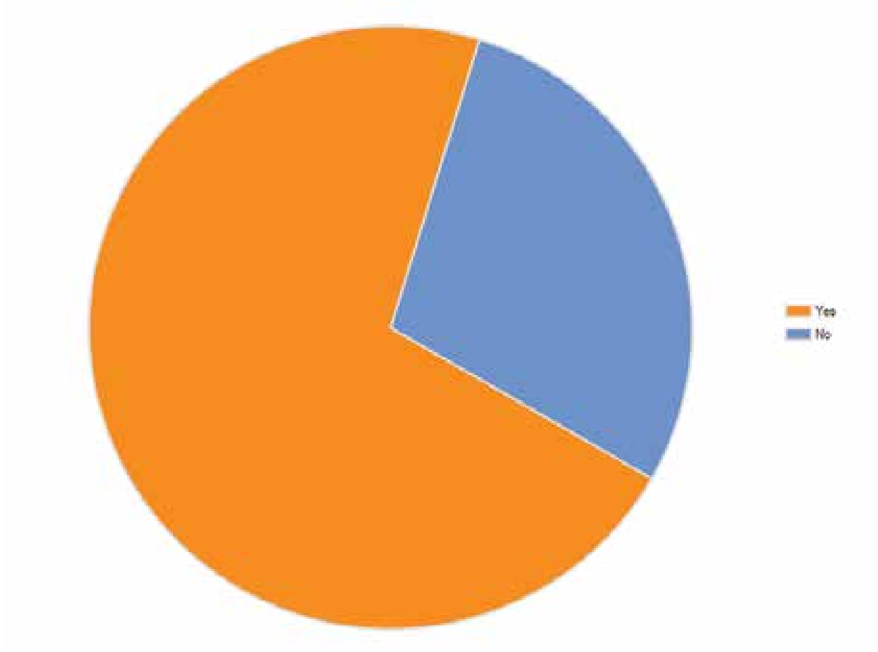
2. **If No, why are you not using this tool?**

- I have assisted the Regional Manager, however I have never provided a session
- I am not the key contact for facilitating the tool

3. **If Yes, how useful do you find this tool?**



4. **Are you using all components of the Prairie Canada Future Game as outlined in the Facilitation Guide, including use of the DVD?**



5. **If no, what components aren't you using and why?**

- The "preferred future" sample from SE Alberta. Goes by to quickly and not easy to understand.
- N/A - I have not facilitated the game.
- I've only done it once and was not leading the game. I supported a colleague. I also simply have not had the time to sit down with the materials and go through them. I will go through them before I do the game again because I don't think my colleague went into the depth we could've had we tried a bit harder.

6. **What are your overall thoughts on the Prairie Canada Future Game?**

- This is a great tool to showcase the importance of thinking through the decisions communities make. I believe as a branch there are many ways we could add value to the tool. Including taking them through their own scenario planning process.
- Participating in the game gives great hands on about Ec. Dev. decisions and the results that could happen based on them. I am not sure the participants could be persuaded to participate a second time however some stakeholders have. At this point many/most of the EDO's have already played the game we would have to have a strong reason why they should play again and that they would obtain new skills/ benefits to participating.
- The game serves as a solid icebreaker tool.

- I think it is awesome, but the “game” can be misleading
- Excellent for scenario planning
- It is a great tool to help participants open up to having good discussions about long term dreams for their communities. Great first step before they start grinding out budgets and critical issues that smother vision and creativity
- I have only participated in playing the game once
- I have offered the game to stakeholders but many have played already or have participated in the game at a yearly conference when we offer it. After our recent meeting with David and Celine and the more digging I did, the game is great but requires proper facilitation skills. This seems key to me.

7. **How do you use statistical information in your work?**

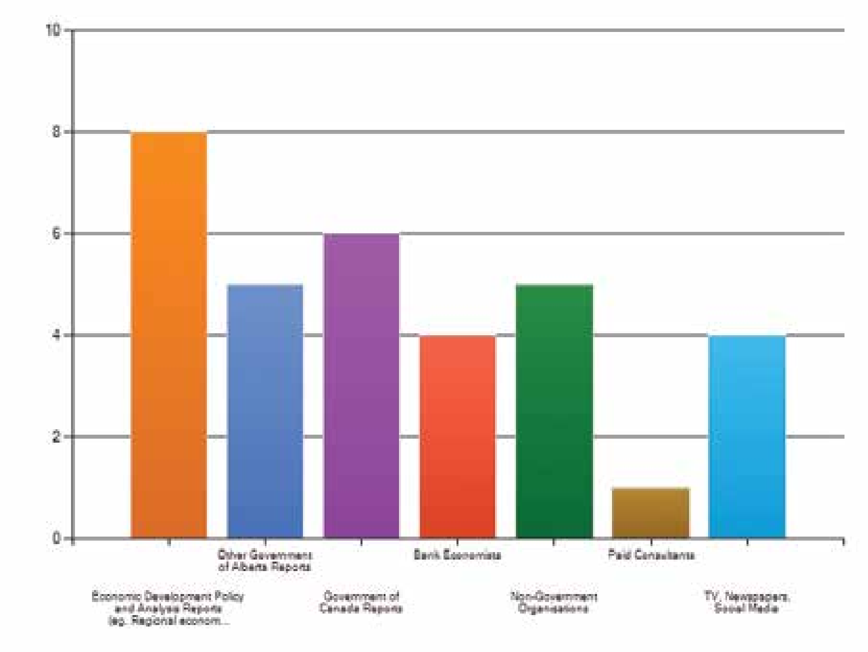
- I review employment and labor statistics, major project inventories, and demographic information for communities etc.
- I currently organize and distribute the information
- To improve service delivery, identify client need and ensure continual improvement
- Regional presentations
- Yes
- To describe the state of a community/region and identify gaps and opportunities
- Not relevant
- I share it with stakeholders. I’m not an expert on stats, we have a group that is and I use them should I get any questions

8. **What are the challenges you currently experience when using statistical information in your work?**

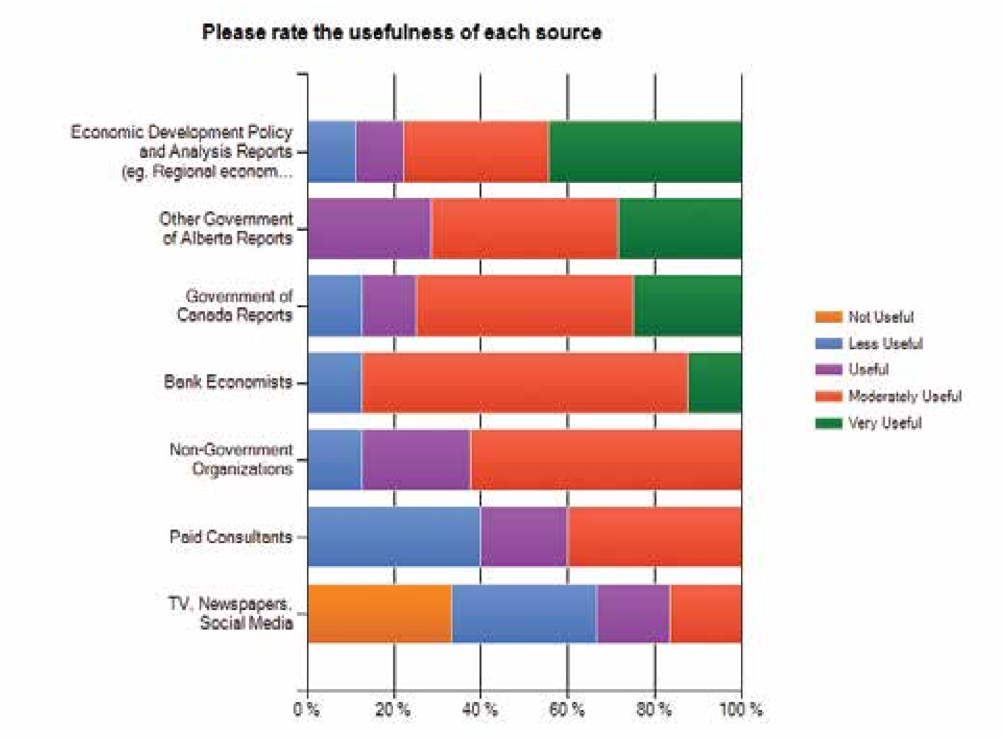
- Understanding how I apply the information to my work, how statistics can help me read the health of a community, or the opportunities/threats etc.
- the biggest challenges are in being able to dice the data into specific communities or regions and obtaining current stats
- Degree of specificity
- Understanding what the numbers mean. How does this impact the communities I’m working with? What stats should a rural community be paying attention to?
- The lack of analysis/interpretation to go along with the stated facts. This is required for the community stakeholders to make the link

- Information is too broad in scope - not regional or local...because its simply not collected at that level
- Communities want stats which are really specific to their town when often they don't exist

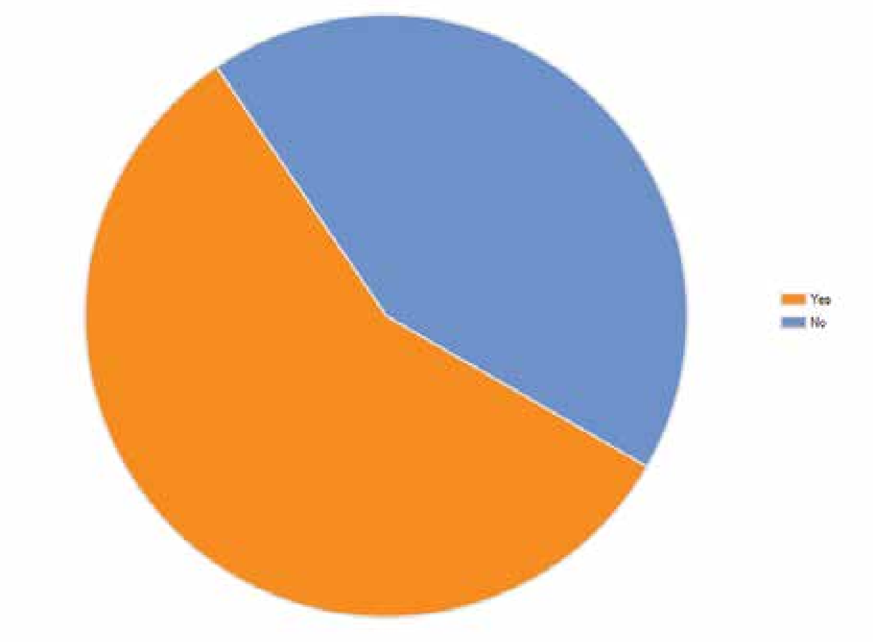
9. **Where do you find your indicators?**



10. **Please rate the usefulness of each source**



11. **Do you use a combination of these two tools when working with communities?**



12. **If yes, what outcomes are these tools, used together, producing?**

- Greater awareness and understanding of domestic and international economy, improved approach to strategic planning
- I have used stats to generate discussion about the current challenges and opportunities, followed by the game to open a strategic planning session that has gone on to incorporate the newly identified challenges/opportunities into the revised strategies
- The stats provide a snapshot of the present - the PCFG provides the tool to determine the preferred future.
- A strategy for action.
- I do not work independently with communities

10. Conclusions

The tools presented in this analysis are largely regarded as best practice examples. They are generally well designed, tested and researched. The Forward Focus project aims to integrate these tools into a useable framework and system to apply in community planning initiatives.

The key challenges to accomplish this objective are:

- There is significant replication within the design and process of the tools. A number of them include a visioning through to action planning methodology. This means that various parts of the tools will need to be excluded or included to avoid creating an over repetitive sequence.
- There is a varying level of sophistication in the tools, both in their theoretical concept, language/terminology and ease of use. Some are quite basic and aimed at a 'beginning' level of planning application (such as BVA), while others are much more complex and theoretical (such as Competitive Advantage).
- Some tools are designed as largely stand alone tools, which will allow easier integration (such as the Prairie Canada Future Game and Economic Dashboard).

In terms of creating an integrated framework and planning system, some points are considered relevant:

- From the surveys and discussions with IAE staff, there is a lack of experience on using multiple tools in an integrated approach. Some significant experience and skill is required to know how to use what tool in what situation, and how to weave the discussions and process together in a seamless manner.
- The proposed additional elements of linking best practice to the Future Game, and the development of the Economic Dashboard, offer the opportunity to develop localized and relevant tools that make the most of the knowledge and skills in the Province.

11. References

Business Vitality Alberta (Alberta Urban Municipalities Association)

http://www.auma.ca/live/AUMA/toolkits+%26+Initiatives/Business+Vitality+Alberta

Prairie Canada Future Game™ (PCFG)

http://eae.alberta.ca/economic-development/regional-development/community-tools/prairie-canada-future-game.aspx

Economic Indicators

http://albertacanada.com/business/statistics/regional-economic-indicators.aspx

Competitive Advantage Tool

"Control your Destiny or Someone Else Will" (J.Calof, R. Marcoux, W. Robinson 2010)– Regional and Community Economic Development Planning: An Exciting Role for Competitive Intelligence.

Measuring Up

Measuring Up! Performance Measurement for Economic Development: A Guidebook for Economic Development Practitioners (2013) Ontario Ministry of Agriculture, Food and Rural Affairs

ERDB Best Practices Tool Kit

http://eae.alberta.ca/apps/econ-toolkit/best-practices.asp

Economic Dashboard

http://www.economicdashboard.albertacanada.com

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