

SELF-ASSESSMENT

DIRECTIONS

Complete the self-assessment below to figure out what you should include in your planning process. If you already have a current version of something that's listed, you don't need to include it in your workplan – just integrate it into your process. If you do not have one of the pieces listed, and think you are able to complete it, we recommend including it. If you have limited capacity, we have starred (*) the components that should be highest priority.

Component	Description	Already have?	Capacity/interest in completing?	Include in workplan?	Toolkit component
Basic statistics & information*	Gather key community (historical and current) info and stats that will provide context (i.e., CCP, membership dept., etc.)	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Info and asset inventory
Asset inventory	List community assets to provide further context	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Info and asset inventory
Summary of key facts (or community profile)	Develop a key facts document to summarize the most useful information	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Key facts template
Stakeholder list	Identify and list the community members and groups impacted by the process, along with potential partners	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Partner and Community Engagement List
Stakeholder engagement plan	Create a plan for engaging your partners and community members	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Partner and Community Engagement Plan; stakeholder pull-out
Strategic assessment (i.e., SWOT or similar)*	What are the strengths, challenges and opportunities facing the community?	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Strategic assessment

SELF-ASSESSMENT

Component	Description	Already have?	Capacity/interest in completing?	Include in workplan?	Toolkit component
Vision for local economic development	Establish a vision to provide an ultimate goal that the strategy is working towards	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Visioning
Strategic areas*	Identify the economic areas to focus on (e.g. entrepreneurial development; band business opportunities)	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Identifying strategic areas
Goals for strategic areas	Establish goals for each strategic area to focus the strategy	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Strategic area goals
Prioritized action items*	Identify and prioritize specific action items to activate the plan	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Translating into action; Prioritizing Activities
Strategic plan document*	Put it all together in a written plan to get everyone on the same page	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Strategic plan template
One-page strategic plan overview	Create a one-page overview to help everyone easily understand your plan	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Plan on a page template
Implementation workplan*	Develop an implementation workplan to move from plan to action	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Implementation and monitoring plan template
Measurement plan	Use performance measurement to determine if the activities are having the intended effect	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Monitoring and measurement; Performance measurement toolkit

SELF-ASSESSMENT

Component	Description	Already have?	Capacity/interest in completing?	Include in workplan?	Toolkit component
Evaluation plan	Use evaluations to help ensure that the program is on track or to determine if adjustments should be made	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Evaluation; Evaluation plan template

SETTING THE STAGE

DESCRIPTION

Early conversations about the community's economic context are essential. The list of reasons given in this tool on why to undertake Community Economic Development (CED) planning will help whoever is leading the project gather important feedback from the community and its partners. This tool will also help to gather support for a strategic planning process.

RATIONALE

- Support and the participation of community leaders and decision makers is essential to the process (e.g. community elders and chief and council)
- Provides an opportunity to understand the general opinions and perceptions around CED and planning
- Opportunity to recruit for project team

LOGISTICS

Format: informal conversations

Key Players: project lead

Resources: existing community plans and documents (e.g., Comprehensive Community Plan, Traditional Land Use Study, existing treaties, Land code laws, bylaws made under the Indian, economic development agreements, community profile, statistics, webpage); other relevant community data that will help make a case for undertaking a strategic planning process

OUTPUT

- An understanding of what a community process could or should involve

(e.g., following proper cultural and community protocols and traditions, building upon existing community processes of engagement); buy-in from key community members and leaders; an understanding of different perspective in the community

PROCESS

1. Review the "Why undertake CED strategic planning" principles on the following page.
2. Think of a couple of sentences that capture why you feel a strategic planning exercise for your community is important and timely. Try to link back to clear reasons, such as funding applications, or the direct impacts efforts may have on the community.
3. Have brief, informal meetings and conversations with the people whose support would be necessary to the success of the process. This could include: council members, Elders, specific knowledge keepers, band administration, local business representatives, prominent local organizations. Many of these may make up the project team.
4. Discuss:
 - What this planning process could look like – are there past or existing community planning processes that can be built upon or revitalized (e.g. community dinners, celebrations, culture nights, storytelling, longhouse, potlatch, etc.)? How long, how much, to what end?
 - What challenges and opportunities are anticipated throughout the process?
 - Thoughts on the direction it could go, who would need to be involved, and how to get everyone on the same page.

SETTING THE STAGE

- Be sure to discuss perspectives on the local economy: what's going well, what could use improvement, and where they feel efforts should be focused.
- Take a look at the community's history of traditional economic development. How does the community want to tell this story in this plan?
- What are the cultural protocols that need to be followed during the planning process (e.g. opening/closing prayer, ceremony, calling upon witnesses)? Who in the community can be contacted to ask for advice? (e.g. personal invitation, phone call, email)? What is the custom for compensating this person (e.g. gifting, honorarium etc.)?

WHY UNDERTAKE LED STRATEGIC PLANNING?

Why is this important?

- Highlight the importance of planning in your local area. Be sure to review any plans, policies and past work that exist already. Have some research including local stats, trends and issues ready to share.
- Consider the traditional economic activities (e.g. weaving, carving, prized food preservation such as smoking fish a specific way, etc.) that the community is/has been known for? How can the community enhance/revitalize this traditional economy and integrate it into this plan?
- A plan makes a difference: 75% of communities who have a plan agree it is effective
- A plan allows communities to be responsive to funding opportunities (which often have very tight timelines to apply) – it is like writing a proposal for your community
- A plan helps makes things happen: it coordinates efforts and creates connections and partnerships (gives you a roadmap)
- A plan gets past the talking (everyone is paddling in the same direction, deadlines, commitment)
- It helps keep track of what you are doing and if it is making a difference
- Many funding applications require that requests link back to a strategic plan

What needs to happen?

- You need to get support, get a fresh plan in place, identify what can be

done now (e.g., what are three quick starts actions) and what needs to be done over the longer term (e.g., upgrade the harbour)

- The project team will customize an engagement and planning process that makes sense for the community's context and capacity. This process will aim to enhance and build upon past or existing indigenous planning processes, honouring proper cultural protocols and practices

TIPS

- Follow your local processes for initiation – the first step is often getting community leaders on board, particularly chief and council
- Discuss with chief and council and/or department managers if it's appropriate to establish a committee, and if so, who should be involved in the committee (e.g., elders, youth, community champions, and representatives from leadership and staff)

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

KEYS TO SUCCESS

DESCRIPTION

This simple checklist allows the project lead to decide whether to proceed with strategic planning. It also provides an opportunity to identify any potential issues.

RATIONALE

- Provides a chance to reflect on the potential for success in the planning process
- Allows any major issues to be addressed before moving forward (or at least what should be kept in mind as the process is designed and moves forward)

LOGISTICS

Format: individual self-assessment, or brief conversation

Key Players: project lead, with one or two additional key players if necessary

Resources: historical understanding of the community and traditional economic activities as well as the dynamics at play in similar past initiatives; notes from [Setting the Stage](#)

OUTPUT

Decision on whether to move forward with strategic planning, as well as understanding of potential issues that may stall the process.

PROCESS

1. Review the Keys to Success checklist on the following page.
2. For the items you do not answer “Yes” to, consider or discuss how this may affect the planning process.
3. Evaluate if any “No” responses will provide a serious enough challenge to delay the strategic planning for the time being.
4. Once the checklist is complete, evaluate overall the extent to which you meet these foundational aspects.
5. If deciding to move forward, evaluate how expected challenges or issues will be managed during the planning process.

CHECKLIST

	Yes	Maybe	No
1. Is creating a plan seen as both necessary and useful by the chief and council, economic development department staff (if applicable) and the community?			
2. Is it likely that the process will be seen as legitimate, fair and transparent?			
3. Is there a plan and support for engagement? Can support be generated?			
4. Are council and/or other community leaders, staff and decision makers on board?			
5.. Are there partners and community representatives that will participate?			
6. Are key community members and partners" ready to collaborate and work together?			
7. Are there community champions to keep things moving forward?			
8. Is there someone to manage and facilitate the planning, implementation and monitoring processes?			
9. If not, can someone in the community be trained/mentored into this role?			
10. Have the necessary processes (e.g. band council resolution) been initiated to formally begin the process?			
11. Has funding been secured for the process?			

COMMON BARRIERS TO SUCCESS

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

- It's a waste of time --Plans just sit on the shelf and gather dust
- This will solve all our problems (Might raise unrealistic expectations in the community)
- It will cost too much to implement- we don't have the resources
- Been there done that – we had a plan a few years back and nothing came out of it
- We aren't interested in growth/change
- Nobody will come out and contribute (community engagement barriers to participating: history of mistrust, family conflict, poverty, transportation, child care etc.)
- Staff are already overworked with their existing jobs (capacity of staff, as well as chief and council may be limited consider what opportunities are there to find a community champion who can be trained and/or mentored to help with leading and managing the planning process in the community and keeping things moving forward?)

BUILDING THE PROJECT TEAM

DESCRIPTION

The project team/committee is the group of people who plan and direct each stage of the strategic process. Often, there is one project lead who coordinates and organizes the process, and then a few other members who communicate regularly. If your community has an economic development officer, administrative staff, a community champion with a focus on economic development, they might be the right person to act as project lead.¹

RATIONALE

- Provides focus, direction and consistency to planning efforts
- Allows for different opinions to be represented and the workload to be shared

LOGISTICS

Format: individual self-assessment, or brief conversation

Key Players: project lead, with one or two additional key players if necessary

Resources: historical understanding of CED in the community, as well as the dynamics in similar past initiatives

OUTPUT

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

¹Each community is different, but in many communities the project lead should be someone who is not in a leadership position to avoid conflict of interest. The council should be a member of the committee but perhaps as a non-voting member. This is advantageous as they can report back to council about the committee's progress and recommendations.

PROCESS

1. From [Setting the Stage](#), the project lead should have a good idea of who should be on the project team. This could include elders, youth, councillors, people involved in community businesses, representatives from a community economic development corporation and other community members.
2. Establish who will comprise the project team, based on the approach that makes sense for your community. For example, it could be arranged internally, a committee or working group could be appointed or recruited for, or you could host a community meeting to get a feel for interest and to discuss and decide as a group.
3. Draft a **Terms of Reference** for the group (see following page) so that potential members are clear on the process and their role. Adjust based on feedback, and finalize project team members once everyone is clear on general expectations of participation.
4. Hold the first project team meeting; discuss draft terms of reference. Go through the self-assessment process and determine the scope of the planning process you plan to undertake.

BUILDING THE PROJECT TEAM

TERMS OF REFERENCE - OVERVIEW OF SECTIONS

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

Purpose of group

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

Responsibilities

What is the role of the group? Begin with “The Committee will...” and list the function the committee will serve, including the actions and other things that will be produced (generally). Also, provide some context as to who will be overseeing or funding the group (presumably Band administrator/ manager/CEO and Chief and Council portfolio representative for economic development), and what their role is.

Membership

Describe the types of members that the group will consist of (youth, elder, administrative staff), with a rationale for their inclusion. Describe the ways in which members are committing to participate, as well as any limitations on their membership participation, if necessary (administrative staff and chief and council may have limited participation because of their role in community). Is it voluntary? Compensated? Address whether membership is open/closed, or if there are any restrictions on who can be involved.

Furthermore, communities may have traditional leaders (vs. Indian Act

chief and council) who have some/complete decision-making authority; its important to understand this and how they fit into the committee.

Also briefly describe how members were recruited. Indicate the overall term of membership, and if the group has a definitive end period.

Governance

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

Meetings

Describe expected meeting frequency and location, and approximately how long it will take. What will the format(s) of the meetings be (e.g., in-person, virtual, teleconference)? Who will organize, chair and set the agenda for the meetings? Will minutes be kept? By whom? Will they be made public? What cultural protocols should begin/end the meeting? Who will ensure that these cultural protocols are followed?

Resources

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

Conflict of interest and confidentiality

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

TIPS

Questions to address at the first meeting:

- Is there a traditional economic governance system/structure (past or existing)? If so, can this committee mirror that structure or somehow fit into/build upon/revitalize it?
- Does the band/nation have an economic development corporation? If not, does the band/nation need/want one?
- What economic development work has been done already?
- What economic development or other revenue sharing agreements already exist? Are there any that are expected to be in place in the future?²
- Are there other plans that address economic development (e.g., CCP)?
- Are there past or current economic development plans? Are they in use?
- How much time, funding and capacity is available to invest in this process?
- What external support is needed, if any (e.g., consultant, regional manager)?
- What has worked well, or not, in the past for planning or executing economic development?

²A nation may be either negotiating a treaty in the BC treaty process, or in the process of court, land claims, or other legal battles/negotiations. Depending on the specific circumstance of each nation, it may or may not be expecting agreements for economic development or revenue sharing.

TERMS OF REFERENCE

PURPOSE OF GROUP

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

RESPONSIBILITIES

The Committee will:

- List the function the committee will serve
- Include the actions and deliverables that will be produced (generally)
- Include the limitations of decision making within the existing community context (advisory, some decision making authority, full decision making authority etc)

MEMBERSHIP

- Describe the types of members that the group will consist of, with a rationale for their inclusion
- Describe the ways in which members are committing to participate, as well as any limitations on their membership participation, if necessary (administrative staff and chief and council may have limited participation because of their role in community). Is it voluntary? Compensated? Address whether membership is open/closed, or if there are any restrictions on composition; also briefly describe how members were recruited
- Communities may have traditional leaders (vs. Indian Act chief and council) who have some/complete decision-making authority; its important to have an understanding of this and how they fit into the committee.
- Indicate the overall term of membership, and if the group has a definitive end period

GOVERNANCE

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

MEETINGS

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

TERMS OF REFERENCE

- What cultural protocols should begin/end the meeting? Who will ensure that these cultural protocols are followed?

RESOURCES

- What resources or support with the group have access to?
- Will the band or development corporation cover costs associated with travel, meeting space, accommodation, food, etc?
- How is the project team accountable for reporting back to Administration, Community Members and /or the development corporation

CONFLICT OF INTEREST AND CONFIDENTIALITY

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

CUSTOMIZED WORKPLAN

DIRECTIONS

After completing the self-assessment and choosing which of the components to include in your process, complete a workplan below to organize your approach. All rows of potential components are included – delete any that aren't being included in your workplan. Adjust the description and add an estimated time commitment as desired, and copy the table into Excel if you prefer a sortable format. Please note that your estimated time commitment is just to help guide the process; community processes can vary widely in terms of time required and specific cultural protocols to follow when conducting this work.

	Action	Estimated time commitment	Responsibility	Method	Timing	Notes/Status
Basic stats & information	Gather key community (historical and current) info and stats that will provide context for your plan	.	<i>Name the key individuals involved</i>	<i>Briefly describe how you will undertake this action</i>	<i>Provide dates/times and milestones</i>	<i>Space for notes or status updates</i>
Asset inventory	Generate list of community assets to provide further context					
Community profile or summary of key facts	Build a key facts document to summarize the most relevant information					
Partner and community engagement List	List all individuals and groups that will be impacted by the process, as well as potential partners	.				
Community engagement plan	Create a plan for engaging your partners and community members and groups	.				

CUSTOMIZED WORKPLAN

	Action	Estimated time commitment	Responsibility	Method	Timing	Notes/Status
Strategic Assessment (i.e., SWOT or similar)	What are the strengths, challenges and opportunities facing the community?					
Vision for local economic development	Generate a vision to provide an goal that the strategy is working towards					
Strategic areas	Identify the economic areas to focus on (e.g. entrepreneurial development; band business opportunities)					
Goals for strategic areas	Establish goals for each strategy area to focus the strategizing phase					
Strategies for program areas	Develop strategies to move the plan to action					
Prioritized action items	Identify and prioritize specific action items					
Strategic plan document	Compose a written plan to get everyone on the same page					

CUSTOMIZED WORKPLAN

	Action	Estimated time commitment	Responsibility	Method	Timing	Notes/Status
One-page strategic plan overview	Create a one-page overview to help everyone understand your plan					
Implementation workplan	Build an implementation workplan to move from plan to action					
Monitoring plan	Develop a monitoring plan to report on progress and status					
Measurement plan	Develop a performance measurement framework to determine if the activities are having the intended effect					
Evaluation plan	Develop an evaluation plan to see if the program is on track or determine if adjustments should be made					

Last updated: *date*

ABOUT US: KEY INFO AND ASSET INVENTORY

DESCRIPTION

To identify the economic activities that make the most sense for your community, it's important to have a good understanding of your current and historical context. This can be done through gathering key information and mapping community assets.

RATIONALE

- Assists in strategic objective setting
- Keeps priorities realistic and focused
- Assists with funding applications, creating new partnerships and identifying opportunities

LOGISTICS

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

Key Players: primarily project lead; could also involve other team members such as economic development staff, band administrator/manager or chief and council representative

Resources: existing documentation (CCP, economic development agreements or revenue sharing agreements, community profile, statistics, webpage); BC Stats, Statistics Canada and other info sources; community asset inventory if it already exists

OUTPUT

A sheet of key community information and statistics and an asset inventory.

PROCESS

1. **Work with what you have:** look first to any information sources that already exist (e.g., your CCP, a community profile and other informational/strategic sources). You can use this information to start your list.
2. **Know your facts:** gather some of the basic statistics that are available for your community. If possible, this should include information on: population (current, historic and projected), age, education, household income and employment rates. Also, take a look at community history and consider traditional economy.
3. **List your assets:** once you've got your basic stats, you'll want to move on to brainstorming assets under the categories below. The project lead could take an hour or two to make a list, or the process could involve a meeting with the council, project team or community. Use the asset categories and descriptions on the following page to create a list for your community that highlights everything that could be considered an asset. Record this in the [Key Facts Template](#) provided.

ABOUT US: KEY INFO AND ASSET INVENTORY

ASSET CATEGORIES

Asset Category	Description	Examples
Physical infrastructure	List the physical infrastructure in your community that has the most significant economic impact.	<ul style="list-style-type: none"> • Transportation infrastructure • Utilities • Community facilities and housing • Information systems, connectivity
Economic land assets	These lands are those that could be used directly for economic gain (e.g., development or resource extraction).	<ul style="list-style-type: none"> • Agricultural lands • Natural resources (energy, forests, mining, water) • Industrial land • Vacant land • Certificate of possession lands (who may be interested in economic development partnership opportunities) • Common band land
Natural assets	These are assets that are intended to be kept in their natural state and not used for direct economic/development purposes.	<ul style="list-style-type: none"> • Bodies of water (lakes, rivers, ponds, streams) • Forests • Parks and recreation areas • Culturally significant areas • Other sensitive or significant ecosystems for the community
Local institutions	Institutions/organizations that provide governance, education or leadership in your community. This includes political assets.	<ul style="list-style-type: none"> • Educational • Political and governing bodies • Religious • Other Associations
Economic drivers	This broad group characterizes any organization involved in the production, distribution and consumption of goods and services in a community. Focus on your key and emerging economic drivers.	<ul style="list-style-type: none"> • Industry • Businesses • NGOs and non-profits • Public sector employment • Traditional craft groups

ABOUT US: KEY INFO AND ASSET INVENTORY

Historical and cultural features	These encompass the history and traditions of your community that serve as part of its identity and contribute to community resilience.	<ul style="list-style-type: none">• Landmarks• Tourism draws• Historical sites• Cultural events and arts• Historical and current traditional goods produced and sold/traded within the community (carvings, beaded work, weaved blankets and clothing etc.)• Traditions
Human assets	The people-based resources and skills that are in your community and can be utilized for economic development work.	<ul style="list-style-type: none">• Individuals with talent, skill, experience or time to contribute• Individuals with talent, skill, experience or time who could provide guidance• Individuals who are in training or completing their education, or who want to be trained or pursue education• Social networks and organizations

ABOUT US: KEY INFO AND ASSET INVENTORY

TIPS

Try to summarize all of the information that your community collects, such as business license data, band membership data, data collected through past community profiles and so on into one place.

For further suggestions on the type of data to collect and where to find it, take a look at the [BC Economic Indicators Library](#) developed as part of the Province's [Performance Measurement Toolkit](#).

Don't worry if you don't have much time or much info a – just doing a quick asset mapping activity can gather a lot of information.

KEY FACTS

QUICK STATS

List the most relevant/high level stats

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

COUNCIL DIRECTION

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

CURRENT ACTIVITIES

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

PAST ACTIVITIES

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

KEY FACTS

RELEVANCE TO OTHER PLANS

Brief summary or quotes from existing documentation (CCP, previous economic development plans, land development strategies, economic development agreements or revenue sharing agreements etc.)

KEY ASSETS

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

PARTNER AND COMMUNITY ENGAGEMENT LIST

DESCRIPTION

This activity asks participants to consider who will be impacted by the CED process and who should be involved.

RATIONALE

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

LOGISTICS

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

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

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

OUTPUT

A list of community members and partners to include in the planning process. This list could be used to create a community engagement plan or simply as a resource during the strategy.

PROCESS

1. Individually, or as a group, generate a list of community partners and members using the template worksheet on the next page.
2. Discuss as a group (if first completed individually) and create list together. Refer to the Engagement Pullout for more ideas on specific groups.
3. This list will help with the next step- creating an engagement plan.

PARTNER AND COMMUNITY ENGAGEMENT LIST

DISCUSSION TEMPLATE

Questions	List of Partners/Community Members/Groups
Who are the leaders in your community?	
Who are your community's partners?	
Who will be harder to reach?	
Who should/could be involved at the community level?	
Who might benefit?	
Who might be negatively affected?	
Who are the leaders in the community? (e.g. Elders, Family Heads, Chief and Council)	Who are the leaders in the community? (e.g. Elders, Family Heads, Chief and Council)
Who should be included because they have control over relevant resources (e.g. Band/Nation administration)?	
Who has the power to hinder or block implementation?	
Who are the community's knowledge keepers?	

TIPS

Having diversity in who is involved will benefit the engagement process. Keep the following in mind:

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

Take a look at the [Engagement Pull-Out](#) for more tips.

PARTNER AND COMMUNITY ENGAGEMENT PLAN

DESCRIPTION

Using the list you created in [Partners and Community Engagement List](#), this step asks you to think about the role these community members and partners will play, as well as the best ways to get them involved.

RATIONALE

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

LOGISTICS

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

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

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

OUTPUT

A list of who to engage, and the information needed to develop an engagement plan.

PROCESS

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

PARTNER AND COMMUNITY ENGAGEMENT PLAN

ENGAGEMENT ASSESSMENT

Partner/Community Member/Community Group	Partner Assessment	When and How?
	Ask yourself: Are they A – Essential B – Important C – Minor ?	Ask yourself: <ul style="list-style-type: none"> • What are the best ways to get input? (One-on-one? On-line survey, open house) • What’s worked in the past, what hasn’t?
<i>Example: Youth</i>	<i>Examples: A - Have key insights into the future of economic development in our community -Involvement is important for community capacity building</i>	<i>Examples: - Online survey with prizes -Event organized specifically for youth</i>

CASE STUDY

TBD

ENGAGEMENT PULL-OUT

WHY ENGAGE

CED is by nature, people centred and community led. Since it is a participatory, community driven process, diverse community input and involvement is important to the success of any CED process or plan. It is also important to provide the opportunity for input from all segments of the community using methods that are appropriate and effective. This can be challenging. This overview will provide some ideas for engaging with different groups in your community, including those that may not typically participate or those that may be harder to reach.

WHO TO ENGAGE

Some examples of groups in your community that may be harder to reach include:

1. Young families
2. Elders
3. Youth
4. Members living off reserve

Every community is different, so in addition to the groups listed above, think about groups that may be typically under-represented in your community and will require a more targeted engagement approach (e.g., those living traditional lifestyles or in remote locations).

HOW TO ENGAGE

In designing a community engagement plan, consider the unique needs, lifestyles and skills of the groups you are trying to reach. All engagement requires different methods and styles of outreach depending on the groups you want to engage and the information and feedback you want to gather from them.

The following are some tips to consider when designing your engagement:

Connect with existing channels and resources. It's likely that there are already a lot of events and gatherings taking place in your community. It can be helpful to attend these to share information about your planning process and gather feedback. That way, you aren't asking people to take time out of their day to attend a separate event. This might include council and youth council meetings, elders gatherings, movie nights, community meals, etc.

Ask before engaging. It may be useful to conduct community outreach, asking a small sample of the community about their preferred methods of engagement - your community will likely already have a good idea of what works and what doesn't (e.g., home visits, face-to-face meetings, one-on-one and small group engagement, larger sessions in a community dinner setting or cultural celebrations). You could ask about perceived and actual barriers to participation and

ENGAGEMENT PULL-OUT

preferred days and times for engagement. Aim to bring to the forefront indigenous ways of planning. Keep in mind that some community members may have cultural commitments during certain times.

Ensure pathways for meaningful and authentic engagement. Consider how to demonstrate the impact that your community's participation will have on your planning process. Transparency is key and if the community doesn't feel like they are being heard, they may feel let-down by the process and lose interest in participating in the future. Try showing direct connections between what you've heard during engagement and what you are doing.

Be flexible. Consider how you can plan your engagement to support and suit the schedules and lifestyles of the groups you want to engage (e.g. work schedules, transportation needs, child care, family life, etc.). In some cases, informal outreach may be the best method to involve those who are not likely/able to attend a scheduled open house. This include making home visits, or simply walking around the community and asking to chat with people.

Relationship building is key. In many first nation communities, there is mistrust and a lack of communication between First Nations and non-First nation groups. Due to the impacts of colonialism, the legacy of residential school, the ongoing injustices of the Indian Act (two generation rule/loss of status), gaps in adequate funding for community services (e.g. education, social development, etc.,) and the high number of children in the care of the Ministry of Family and Children, there are still many issue and injustices that may need to be addressed before meaningful engagement can be conducted. But be patient and persistent; more often, the simple act of bringing community together, and creating the space for them to openly discuss things is a healing process. For many, this may be the first time that they have ever had their voice be heard, or validated.

Honour cultural protocols. During your community engagement sessions, try to include ways honour your cultural protocols, practices and traditions. You can ensure this happens by asking elders for advice and letting the community lead this process.

FOR YOUNG FAMILIES

- Consider holding engagement sessions at existing meetups, events, support programs and other locations that young families frequent (e.g., community centres or recreation facilities)
- Incorporate networking, social and cultural opportunities in your engagement
- Use branding to ensure your CED process is recognizable
- Utilize online technology and social media to encourage participation and gather feedback; ensure your engagement process is suitable for mobile use and viewing.
- Keep the requirements of engagement short to ensure that young families can engage easily and quickly.
- Offer food, childcare on site and transportation options.

ENGAGEMENT PULL-OUT

FOR ELDERS

- Consider holding engagement where your community's seniors tend to meet (e.g., recreational and community facilities)
- Consider the technology literacy of elders. Some elders are not comfortable using online devices so you will want to have print materials. Even when print materials are available, some elders may have low literacy levels, or speak their native language only. Be prepared to have one-on-one or group conversations to convey your information.
- That said, an increasing number of elders are accessing information online and some will want to engage using computers, phones and tablets.
- Consider age related physical changes (e.g. mobility, eyesight, hearing loss) and how your engagement methods can be adapted to suit these challenges.

FOR YOUTH

- Consider holding engagement at the community school, youth centre or other youth program locations.
- Some communities have a youth worker on staff, so it would be beneficial to speak to them to ask the best approaches for engaging youth.
- Your community may have a Youth Council. If so, they should be involved and will likely be able to provide useful information on engaging other community youth.
- Effectively utilize common social media challenges to encourage participation and/or gather input (e.g. Facebook, Twitter and blogs)
- Again, keep the requirements of engagement short so that youth can engage easily and quickly but also have options for deeper levels of engagement.
- If you need to engage youth for longer periods, mix up the sessions with fun activities or games, or have someone from the community conduct a cultural activity.
- Consider training youth to be facilitators or involving youth in organizing and committee roles.

FOR MEMBERS LIVING OFF RESERVE

- Band administration likely has a list of members living off reserve. Talk to them about their experiences contacting these members.
- These members may receive newsletters and updates through the band administration. You may be able to add information and engagement materials onto what they are already receiving.
- Offer alternative means of participating as it may be difficult for members living off-reserve to attend community engagement events or meetings.
- Use online surveys, email and phone calls.

ENGAGEMENT PULL-OUT

HELPFUL RESOURCES

- [Community Engagement Toolkit by SPARC BC \(July 2013\)](http://www.sparc.bc.ca/sprout-resources-for-social-change#comm-eng-toolkit). <http://www.sparc.bc.ca/sprout-resources-for-social-change#comm-eng-toolkit>
- [Engaging Youth in Heart and Soul Community Panning by the Orton Family Foundation \(Spring 2011\)](http://www.orton.org/sites/default/files/resource/1667/Handbook%20YOUTH_041411_FINAL_0.pdf). http://www.orton.org/sites/default/files/resource/1667/Handbook%20YOUTH_041411_FINAL_0.pdf
- [First Nations Communications Toolkit \(2015\)](http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/fnct_e_1100100021861_eng.pdf). http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/fnct_e_1100100021861_eng.pdf

STRATEGIC ASSESSMENT

DESCRIPTION

Similar to an analysis of strengths, weaknesses, opportunities and threats (SWOT), this exercise starts with the community's strengths and also areas for improvement. It then uses both to identify opportunities to build on these strengths and address any gaps.

RATIONALE

- Builds interest and commitment by sharing positive stories
- Provides a framework for later steps including strategic goal and action-setting

LOGISTICS

Format: conversation, community owned business walk, online form, group session; see next page for details

Key Players: could include: project team, community members, partners and groups, public

Resources: notepad/computer to record; poster paper and markers for group sessions; asset inventory; print-outs (if applicable); Key Facts

OUTPUT

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

PROCESS

1. Icebreaker: ask participants to each share a positive story or experience they've had in the community related to the local economy (including historical/traditional economy)
2. Discuss common elements within the story. Start list on flip chart/template under "What are our strengths and what are we doing well.". Refer to asset list if helpful.
3. Next, turn to discussing "where could we improve" to explore gaps or shortcomings and record on a second poster page.
4. Ask participant(s) to consider both lists, and move to identifying what opportunities and trends can be taken advantage of to: build on strengths, address gaps and consider new approaches based on local, regional and broader trends – record on third sheet of poster paper. Refer the group to the Key Facts document if you have completed one. Be sure to consider "What's going on around us?"
5. Once completed, gather information in one overall document with bullet points on key messages.

CUSTOMIZE

We recommend using more than one approach to getting input from project team members, community partners and community members on these three questions. The exercise can be adjusted for different contexts. Here are a few ways in which this could be modified:

Interview: set up a few phone or in-person interviews (10-15 minutes in length) with various members of your community or other relevant partners and community leaders to get their take on the questions above.

Indigenous/community owned business walk: organize a tour of a selection of your local indigenous businesses to check in with them about how business is going and gather their feedback on the three questions.

Community feedback: this could be as simple as a feedback form on your community's website, a quick survey via website/social media/newsletter or general questions posted directly to social media. You could also incorporate the questions into a community meeting, or set up group discussions. For some community members, it may require an in-person home visit to get their feedback.

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

Project team group session: at the very least you will want your project team or those working on the CED process to work through the questions above.

TIPS

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

VISIONING

DESCRIPTION

A vision provides direction to the CED process. There are many ways to generate a vision, this is just one example. This tool walks participants through the process of establishing the vision for the strategy by asking participants to imagine the future of their community.

RATIONALE

- Provides an goal around which to base objectives
- Captures strengths and opportunities within the community

LOGISTICS

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

OUTPUT

A clear statement that communicates the desired future of your community and reflects the community's values, traditions and goals. The vision can also be used to begin thinking about community economic goals.

PROCESS

1. Ask participants to consider the strengths, improvements, opportunities and assets unique to the community (if applicable from previous exercises). Be creative here. Perhaps ask them to look at their community as if they were an eagle flying over it. Or an Elder walking through it with their grandchild. Or a non-resident member visiting. What would they see?
2. Consider as a group what time frame they prefer to have for the vision. Communities may prefer to look seven generations ahead, or some may prefer to stick to ten years. Then ask what their community in the future (in the determined timeframe) may look like – what could the economic aspects of the community look like? What is different from now? What is similar? Ask about some phrases or words in their language that can be used to reflect this vision.
3. After this discussion, ask participants to jot down on individual pieces of paper descriptive words or phrases that capture their ideal vision for the community they want for their grandchildren or great-grandchildren.
4. As a group, share the words/phrases and record them on poster paper. Be sure to check with them about spelling and pronunciation of words or phrases in their language if necessary.
5. Together, discuss the various words and pull out/circle common or agreed upon phrases.
6. Tying these concepts together in a statement is often best done by a single person (project lead). We recommend ending this part of the meeting here. Developing the final statement can be done by the project lead. At this point in the meeting, using the ideas generated for your vision, you may want to move on to Identifying Strategic Areas.
7. Circulate the draft vision to the group for input; make changes as necessary but don't dwell on it. Later stages will require much needed effort, so spend the goodwill of the community wisely.

HOW IT FITS

An add-on exercise for the visioning exercise is to create a name, title or metaphor for your plan that reflects the vision. There are a number of ways to do this. One way is to ask participants to contribute a name for the strategy before an event or meeting, and then generate additional ideas during the meeting or event. Perhaps there are specific and significant landforms, animals, stories, songs, dances or traditional practices that are symbolic of the elements of the plan, including the vision. At the end of the session, come to a group consensus if you can. Multiple rounds might be needed to come to a consensus. If you cannot come to a consensus, voting is the alternative (by hand or by volume are some ways of voting quickly). Consider offering a prize for the name that gets chosen. This almost always achieves a catchier name that is more reflective of your community than the “XXX Economic Development Plan.” You could also come up with a name during the visioning exercise outlined above. When words are brainstormed for the vision, ask the group to think about related and catchy titles for the plan.

Examples:

- “Tides of Change” – Cormorant Island Economic Development Strategy- ‘Namgis First Nation and the Village of Alert Bay
- “7 Generations, LSIB’S 5 Year Community Economic Development Strategy”- Lower Similkameen Indian Band
- “Working Together”, Xwisten’s Economic Development Plan- Xwisten
- “Niigaan Zhaadaa (Moving Forward): Economic Development Strategic Plan 2014 -2018” – Pic Mobert First Nation

TIPS

- Consider your overall vision and “mini visions” in more specific economic areas. This might help when choosing strategic areas (in the next step). It’s fine to brainstorm both at once!
- During the visioning process, it is easy to get bogged down with details. Keep the vision short and simple and don’t try to wordsmith in a group setting. If your community already has a vision or it has one for a plan like a Comprehensive Community Plan, this may also work or help inform a CED vision process vision.

COMMUNITY CONSULTATION

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

Host a community dinner or celebration with cultural events and protocols integrated into the agenda – ask attendants to record on a slip of paper a collection of words or a phrase they would use to describe their ideal version of the community in 5,10 or 20 years, or whatever your community feels is an appropriate time frame.

CASE STUDY

Lake Cowichan First Nation, located in the Cowichan Valley region on Vancouver Island, developed a 5-Year Economic Development Strategic Plan as a way to plan for the community's economic future.

The strategic plan, which involved a great deal of community engagement, describes the following process for developing its vision:

"Through a community engagement process facilitated by team member and project coordinator Jack Smith, the Lake Cowichan First Nation community members and project team members discussed the importance of developing a community-based "vision statement" ... and spent a considerable amount of time envisioning a statement that would indeed reflect a shared image of the community moving forward. The vision statement put forward by the community, in addition to being the driving force for the economic strategic plan, is realistic and achievable and conceivably incorporates the overall vision of the Lake Cowichan First Nation. It respects the past, considers the present and defines the future and clarifies the community's intentions for economic development."

As a result of this process, Lake Cowichan selected the following as their economic development vision: "To build a solid foundation for our current and future generations to grow and prosper while acknowledging our culture and heritage." Furthermore, the community bolstered the vision statement by adding the following: "The goal of the Lake Cowichan First Nation is to provide opportunity, employment, and the means to become economically self-sufficient through sustainable economic development. Such development will allow for self dependence and reliance."

EXAMPLES

"Honouring the past. Creating opportunity today. Inspiring the future."

-Akisqnuq First Nation: 5-Year Economic Development Plan

"Kanaka Bar is committed to using its lands and resources to maintain a self-sufficient, sustainable and vibrant community." – Kanaka Bar Indian Band Community Economic Development Plan

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

"By 2020 Solomon will:

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

-Village of Solomon Local Economic Development Plan

IDENTIFYING STRATEGIC AREAS

DESCRIPTION

While the vision captures an ideal, this step clarifies the economic development areas your community will focus on to achieve the vision.

RATIONALE

Identifying program areas helps to:

- Focus on areas of community interest and opportunity
- Ground vision in several target areas
- Make it easier to establish strategic priorities

LOGISTICS

Format: small workshop activity

Key Players: project team (with additional community partners, community members or council as desired)

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

OUTPUT

A breakdown of the vision statement into specific areas that will be used for strategizing, with the option to include goals for each area.

PROCESS

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

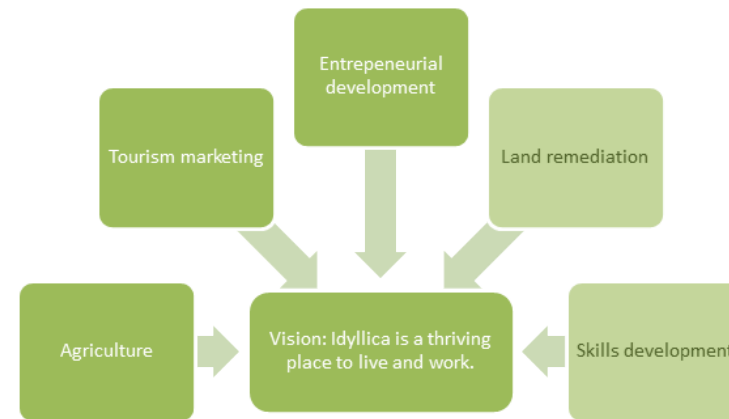
IDENTIFYING STRATEGIC AREAS

EXAMPLES OF COMMON STRATEGIC AREAS

- Business Retention and Expansion (BRE)
- Tourism marketing
- Sector or cluster development
- Community promotion and marketing
- Area targeting or regeneration
- Skills training
- Employment generation
- Agriculture
- Community infrastructure development
- Entrepreneurial development
- Marketing local products
- Economic partnerships
- Tourism product development
- Traditional economic activities
- Capacity building and job support
- Band/nation self reliance
- Band/Nation business development

MAPPING EXAMPLE

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



TIPS

- Different participant types (e.g., chief and council, administration) can be given different coloured dots to track any differences in rankings.
- Think about what's manageable- it's better to target just 2-3 areas in a two or three-year plan, particularly if you're a smaller community or just starting out your CED program. Focus on the areas that are most realistic and most needed.

SETTING STRATEGIC AREA GOALS

DESCRIPTION

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

RATIONALE

Goal-setting helps to establish the priorities and values of a community or project team, and acts as a target to work towards. Having clear goals also helps to track and monitor progress and success.

LOGISTICS

Format: small workshop activity

Key Players: project team (with additional community partners, community members or council as desired)

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

OUTPUT

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

PROCESS

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

SMART goal-setting is:

Specific: identifies what will be accomplished

Measurable: change can be tracked

Achievable: is supported by the available resources

Relevant: relates to community needs and overall vision

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

2. Think of goals related to each strategic area, and test them against the SMART criteria in a group discussion. See Plan on a Page example for an example on how these goals factor into a plan. Also see a list of examples on the following page. Think of them as vision statements for each of the strategic areas.

SETTING STRATEGIC AREA GOALS

GOAL EXAMPLES

Strategic Area	Goal
Business Retention & Expansion	To lower the rate of annual business closures in the community
Entrepreneurial development	To support and promote entrepreneurial development in the community
Local products	To increase the sale of local foods and products

CASE STUDY

Jean Marie River First Nation Community Economic Development Strategy 2016

Jean Marie First Nation's Community Economic Development Strategy draws on the nation's vision statement from its 2013 Community Plan:

"We the Tthets'ek'ehdeli Got'ie, are proud of our Dene traditions, language and beliefs. We value and respect the land, water and animals that have sustained us for many generations. We shall continue to use and respect our natural resources. Building on the knowledge and skills of our people, we shall work together to create a healthy, sustainable future for ourselves and our children. We shall strive to find a balance between the traditional and modern ways of life."

Through the process of developing their Community Economic Development Strategy the following was added to the vision:

- There will be jobs and houses for young people who want to return to the community.

- Jean Marie River will become the hub of the Dehcho region and support resource activity located around the community.
- Tourism will be established with appropriate support services such as a visitor centre, and access to traditional lands.
- The community will be self-sufficient; economic opportunities, housing and commerce will be provided by the community.
- Goals:
 - Develop sustainable tourism operations
 - Develop a sustainable forestry operation
 - Develop a sustainable sawmill operation

TIPS

Measuring Success

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

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

ACTION DEVELOPMENT

DESCRIPTION

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

RATIONALE

- To get the plan moving, it is important to move from vision and strategic areas to specific actions
- By pairing strategic areas with actions in a long list, it creates a long list to then narrow down

LOGISTICS

Format: individually or small workshop activity

Key Players: project team (with additional community partners, community members or council as desired)

Resources: flip chart paper, markers, vision and objectives

OUTPUT

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

PROCESS

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

TEMPLATE AND EXAMPLES

Strategic Area	Action Ideas
EXAMPLE 1: Retain and expand existing businesses	<ul style="list-style-type: none"> • Speak with existing indigenous business (if applicable) to find out if they have needs or opportunities for expansion • Marketing support (link up businesses on community and provincial web sites) • Skills workshops • Network with industry professionals
EXAMPLE 2: Improve the Reserve	<ul style="list-style-type: none"> • Identify lands to purchase for future potential development • Add more street lighting • Design and hang new street signs and banners • Organize a monthly community clean-up • Improve signage and wayfinding (to and around community)
Strategy X	

CASE STUDY

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

Improvements on the harbour and marina were identified as priority economic opportunity for the island, and an important way to capture

tourism traffic, grow the fishing fleet and improve quality of life.

Examples of actions within this strategy area are as follows:

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

TIPS

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

PRIORITIZING ACTIVITIES

DESCRIPTION

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

RATIONALE

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

LOGISTICS

- Format:** individually, a few project team members or workshop
- Key Players:** project team (with additional community partners, community members or council as desired)
- Resources:** flip chart paper/template, markers, vision, objectives, strategies and brainstormed activities

OUTPUT

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

PROCESS

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

PRIORITIZING ACTIVITIES

RANKING MATRIX AND EXAMPLES

Action	Financially realistic	Ease of Implementation	Partner Benefits	Score
	(1=low degree 3=moderate degree 5=high degree)			
Develop community website	2	2	4	8
Tourism marketing campaign	3	2	5	10
Speak with existing Indigenous business	5	4	5	1
Action X				
Action Y				
Action Z				

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

FINAL LIST OF ACTIVITIES

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

PRIORITIZING ACTIVITIES

CASE STUDY

In 2013, the Akisqnuq First Nation, located near Windermere, BC came together, led by community leaders and administration, to create the Akisqnuq First Nation 5-Year Economic Development Plan.

The plan recognized that the Nation is limited by financial and human resource constraints and developed a priority setting tool and decision-making chart to help prioritize community economic development ideas. Some of examples of strategic areas, strategic goals and actions that were chosen for the plan include:

Strategic area¹: Build industry-standard community infrastructure that meets the needs of our growing community.

Strategic goal²: Community Core Improvements

Actions³:

- Design structure
- Determine budget
- Allocate Resources
- Do it

¹Strategic areas are called “Guiding Principles” in original plan.

²Strategic goals are called “Goals” in original plan.

³Actions are called “Core Activities/Services” in original plan.

Strategic area: Promote Ktunaxa language, culture, traditions in the workplace, programs and celebrations.

Strategic goal: Promote opportunities for elders participation in events and programs.

Actions:

- Elders lunches
- Elders gatherings
- Aboriginal Head Start Program

TIPS

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

(insert relevant image(s) from community)

Title

Economic Development Plan

Community Name

<COMMUNITY NAME>

ECONOMIC DEVELOPMENT PLAN

INTRODUCTION

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

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

<COMMUNITY NAME>

ECONOMIC DEVELOPMENT PLAN

WHERE ARE WE NOW?

Here you should provide a summary of:

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

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

ECONOMIC DEVELOPMENT PLAN

WHERE DO WE WANT TO GO?

Vision

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

“Insert vision statement here.”

Strategic Areas and goals

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

Title (Strategic Area 1)

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

Title (Strategic Area 2)

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

Title (Strategic Area 3)

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

Title (Strategic Area 4)

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

ECONOMIC DEVELOPMENT PLAN

HOW ARE WE GOING TO GET THERE?

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

Title (Strategic Area 1)

Goal:

Actions

List specific action items for strategy

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

Details

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

Title (Strategic Area 2)

Goal:

Actions

List specific action items for strategy

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

Details

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

Title (Strategic Area 3)

Goal:

Actions

List specific action items for strategy

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

Details

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

ECONOMIC DEVELOPMENT PLAN

Title (Strategic Area 4)

Goal:

Actions

List specific action items for strategy

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

Details

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

<COMMUNITY NAME>

ECONOMIC DEVELOPMENT PLAN

IMPLEMENTATION PLAN

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

Copy in implementation framework here

<COMMUNITY NAME>

ECONOMIC DEVELOPMENT PLAN

ARE WE GETTING THERE?

Monitoring

Briefly describe your overall approach to monitoring.

Performance measurement

Briefly describe your overall approach to performance measurement.

Copy in your measurement framework, if applicable.

Evaluation

Briefly describe your overall approach to evaluation.

Copy in your evaluation framework, if applicable.

<COMMUNITY NAME>

ECONOMIC DEVELOPMENT PLAN

APPENDICES

Attach any relevant appendices here. This could include:

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

ECONOMIC DEVELOPMENT

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

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

IMPLEMENTATION PLAN

PURPOSE OF GROUP

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

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

Last updated: *date*



ACTIVATING YOUR PLAN

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

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

Many communities find themselves in the position of having developed a plan that exceeds their abilities to implement it, and it's hard to know where to start or what to prioritize. Some or all of the following steps may help to get you going:

- Grant matching: see what grant resources are out there and which actions in your plan meet the grant criteria. See if there are specific grant programs that focus on specific elements, or have a time-limited duration. Focus some of your initial efforts on those which satisfy these criteria. You will find that grant applications also become easier to complete when you have a strategic plan to link it back to.
- Capacity matching: shop the plan around and see what actions in the plan can be moved on by staff, community groups or community members.
- Prioritize: re-group with key partners and the community for a session to focus on the strategic area and activity prioritization steps.
- Create a plan-on-a-page: this exercise is often very helpful to visually pull out what's most important.
- Organize your vision: use the implementation plan template in this toolkit to clearly lay out who is doing what and when.

“WE HAVE A PLAN BUT WE CAN’T GET ANY TRACTION WITH KEY PARTNERS OR COMMUNITY MEMBERS TO MAKE IT HAPPEN.”

One of the most common reasons plans fail is that they did not fully integrate feedback and perspective of key partners and community members into the process. Trying to get people involved who did not contribute to the plan may be challenging. Some things that can help include:

- Identify “quick starts” – actions that are simple to do, visible and have enough support to get the strategy moving.
- Ask two or three key partners and/ or community members or groups to plan and implement one or more of the quick-start options to boost community enthusiasm.
- Frame initial actions as a “pilot” to see how it works for the community. Listen to their feedback during and after, and assure them that the focus of the remainder of the plan is flexible and will be based on their feedback.
- Hold a session to re-imagine the plan before getting started.

ACTIVATING YOUR PLAN

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

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

- Again, identify “quick starts.”
- Get committed champions: before finishing the strategy process, get some individuals or staff to take on some actions.
- Do action planning: develop detailed action plans with key community members and partners that identify clear tasks, lead and support individuals, resources and timelines.
- Work with a committee: gather on a regular basis, formally or informally.
- Build in initial funding or projects to give your plan a quick boost and get it off the ground with a project of significance, with involvement of the community to encourage commitment to the process.

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

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

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

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

Sometimes, the community can’t agree how to move forward. Try returning to the visioning and goal-setting stage to ensure that everyone is on the same page. Prioritize the activities and strategic areas as a group using some or all of the suggested methods, and decide in advance if a certain person or group will have the final say. Also be sure to consult widely with partners and the community and spend some time on an asset inventory and strategic assessment – these activities often help to shed more light on the types of efforts that are most needed and will yield the most immediate results.

ACTIVATING YOUR PLAN

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

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

- Have an approved plan: the plan should be clearly written and approved by Chief and Council
- Committees: it should not be just one person’s project. Multi-partner/staff or oversight committees with ties to leadership can provide bridge capacity when there is staff or political turnover.
- Record keeping: as the plan unfolds, keep minutes or record of key decisions in the process so that new individuals (staff or political) can understand the factors that led to decisions.

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

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

- [B.C.’s Economic Development Portal](#), which contains a number of resources, tools, recorded webinars, grants and funding look-up and contact information.
- Each region in B.C. has a regional economic development manager, who can provide one-on-one support and guidance. If you’re not sure who your regional manager is, send a message to economicdevelopment@gov.bc.ca
- The [BC Economic Development Association \(BCEDA\)](#) is the professional association of economic development practitioners in B.C., and provides support services, professional development opportunities and other resources.
- The [Union of BC Municipalities \(UBCM\)](#) has a Community Economic Development committee that periodically produces research and advice to its members. The [Local Government Management Association \(LGMA\)](#) offers programs, workshops and webinars that may fit your needs.
- The [Aboriginal Business and Investment Council](#) has a mandate to “improve Aboriginal participation in the economy and promote economic certainty in the province by encouraging economic growth in Aboriginal communities.” Among other things, they help to develop relationships between Indigenous communities, industry and government to work towards practical measures for economic development.

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

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

MONITORING AND MEASUREMENT

DESCRIPTION

This section provides an overview of the ongoing monitoring, measurement and evaluation activities that will help guide the implementation of your activities, assessing whether they are having the impact you had hoped for.

RATIONALE

- Ongoing monitoring allows the project manager or community to easily report on progress and status
- Performance measurement helps determine if the activities are having the intended effect

LOGISTICS

Format: varies according to desired approach

Key Players: project lead

Resources: provided templates and guidance; Performance Measurement Toolkit

OUTPUT

Monitoring plan and/or performance measurement framework.

PROCESS

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

MONITORING AND MEASUREMENT

TIPS

It will take an hour or two to acquaint yourself with the principles of performance measurement and seeing how it will apply to your program.

During this time, you can select a few quick-start indicators, or decide if you'd like to create a visual model to map your activities, desired outcomes and ultimate vision in order to pinpoint the indicators that best track your success.

Measurement doesn't have to be onerous – set your own parameters and discover the value in mapping your progress.

MONITORING AND MEASUREMENT

DESCRIPTION

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

RATIONALE

- Useful for reflecting back on the progress of the program, and making important adjustments based on feedback to ensure that goals will be met.
- You may also need to adjust the activities themselves. Evaluation will keep programs responsive, flexible and well-informed.

LOGISTICS

Format: easiest for the project lead to complete

Key Players: project lead

Resources: Current strategic plan

OUTPUT

Evaluation framework and plan; revised strategic plan if applicable.

PROCESS

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

SIMPLE EVALUATION PLAN AND EXAMPLE

The table below provides an example of an evaluation plan that reflects on the overall program status and direction. It is often easiest to explore a series of questions related to each program area with the relevant community partners and members, and then address general questions about the overall program to the project team. Collecting information for each question can be as simple as a series of discussions or interviews, or you could integrate additional documentation review, surveying, online discussion/social media feedback or focus groups.

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

MONITORING AND MEASUREMENT

TIPS

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