

STRATEGIC PLANNING TOOLKIT

FOR LOCAL
ECONOMIC DEVELOPMENT



AGENDA



Ministry of
Jobs, Tourism
and Skills Training

1

Introduction

2

Why Strategic Planning?

3

Strategic Planning Toolkit

4

Why Performance Measurement?

5


Performance Measurement Toolkit



WHO WE ARE



Ministry of
Jobs, Tourism
and Skills Training



The **Ministry of Jobs, Tourism and Skills Training** helps create a strong economy in B.C. by creating new jobs, defending existing ones and positioning ourselves for long-term growth.

The **Economic Development Division** works with communities, industry, economic development agencies and other ministries to promote regional economic growth and diversification.



For more information: gov.bc.ca/economicdevelopment




WHO WE ARE



Ministry of
Jobs, Tourism
and Skills Training



WHAT IS STRATEGIC PLANNING?



A process in which a community looks at its current situation and compares that situation to where it would like to be within a certain period of time.

- *International Economic Development Council*

WHY UNDERTAKE STRATEGIC PLANNING?



- Allows communities to be responsive to funding opportunities
- Coordinates efforts and creates connections and partnerships
- Markets your community and attracts investment
- Gets past the talking
- Helps keep track of what you are doing and if it is making a difference

SURVEY RESULTS



PLANNING



Have and actively use an **ED PLAN**

Of those who have a plan,

75%
think it's
EFFECTIVE

43%
update
annually

27%
update
every 2-4 yrs

In partnership:



Ministry of
Jobs, Tourism
and Skills Training



COMMON BARRIERS

Common
barriers
to success



- Perception that plans just sit on the shelf and gather dust
- Might raise unrealistic expectations
- Costs too much to implement
- Been there done that
- Not role of local government to work on economic development
- No interest in growth or change



DOES THIS DESCRIBE YOUR COMMUNITY?



Plan with no action



Action with no plan



INTRODUCING!



Development of toolkit with regular consultation with an advisory group of EDOs around the province



TOOLKIT PURPOSE



Enable communities to create a concise, measurable and actionable economic development plan



“Surge momentum”



WHAT DOES THE TOOLKIT PROVIDE?

- ✓ Empowerment of local leaders
- ✓ Achievable process regardless of your stage in economic development
- ✓ Break-down of strategic planning process into manageable pieces
- ✓ Self-guided and customizable step-by-step approach
- ✓ Initial self-assessment tailors process to your community's needs
- ✓ Delivers a manageable 8 to 12 page plan
- ✓ Web-based and downloadable



THREE APPROACHES TO THE TOOLKIT

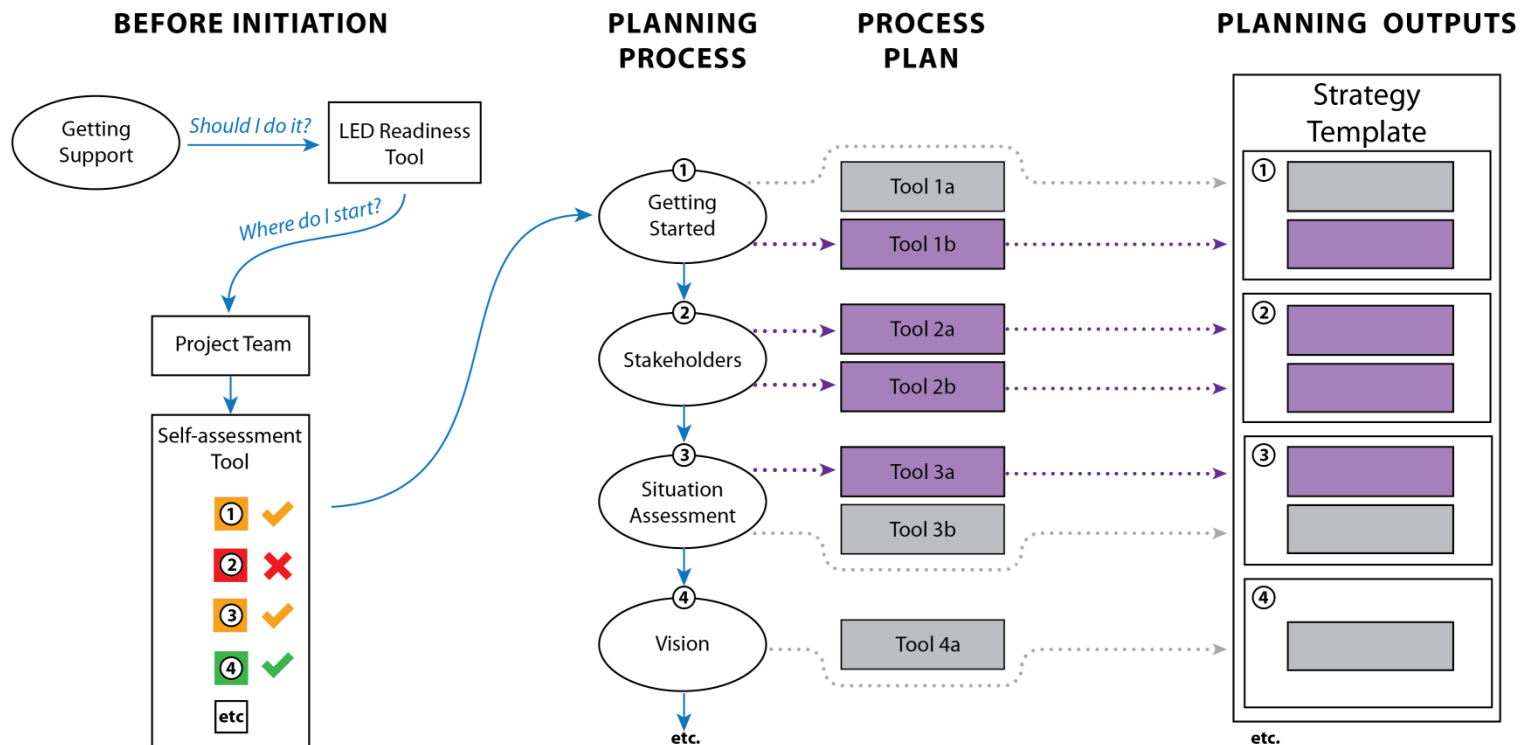
Community leads own process with existing staff (e.g. EDO or CAO)

REO Regional Managers assists in facilitating the planning process

Community hires a consultant to facilitate the process
(potentially by accessing Rural Dividend Funds - \$10K)



TOOLKIT STRUCTURE



LIVE DEMO

The screenshot shows the British Columbia Strategic Planning Toolkit for Local Economic Development website. The header features the British Columbia logo and navigation icons. A left sidebar lists various tools, with 'Strategic Planning Toolkit' highlighted. The main content area is titled 'Strategic Planning Toolkit for Local Economic Development' and includes an introductory paragraph, a list of target audiences, and a section titled 'How the Strategic Planning Toolkit Works' with a list of five steps. A right sidebar titled 'Need help?' provides contact information for regional managers.

BRITISH COLUMBIA

Community Partners
Services
Working Regionally
Economic Development 101
Strategic Planning Toolkit
Performance Measurement Toolkit
Business Attraction Toolkit
Support Your Business Community
Land Development Toolkit

Strategic Planning Toolkit for Local Economic Development

This customizable process allows you to quickly and effectively develop an action plan to realize your community's economic vision. The focus of this toolkit is on identifying the activities that have the greatest benefit, and involving the right people to put them into action.

This toolkit can help communities or groups who:

- Have never developed, or have an outdated strategic plan
- Have a lengthy plan that was created, but has sat on the shelf
- Have an active plan but need implementation, monitoring or measurement support
- Aren't able to go through a whole planning process but would benefit from learning about individual components of the process, like stakeholder engagement

How the Strategic Planning Toolkit Works

Click below to access the tools and templates for each step of the planning process. Begin at the "Getting Started" step.

Expand All | Collapse All

1. Getting Started
2. Where are we now?
3. Where do we want to go?
4. How are we going to get there?
5. Are we getting there?

Need help?

Your regional manager is available to help facilitate you through this process – contact them at any time. If you're unsure who your regional manager is, contact economicdevelopment@gov.bc.ca

>>> [Launch the Strategic Planning Toolkit](#)

THANK YOU!
QUESTIONS?



For more information: gov.bc.ca/economicdevelopment



SELF-ASSESSMENT



KEY TO THE PROCESS

Provides an overview of the various tools and templates available

Allows you to determine which components of the toolkit are right for your situation

>>> [Launch the Self-Assessment Tool](#)



SELF-ASSESSMENT



KEY TO THE PROCESS

DIRECTIONS

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

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

SELF-ASSESSMENT



KEY TO THE PROCESS

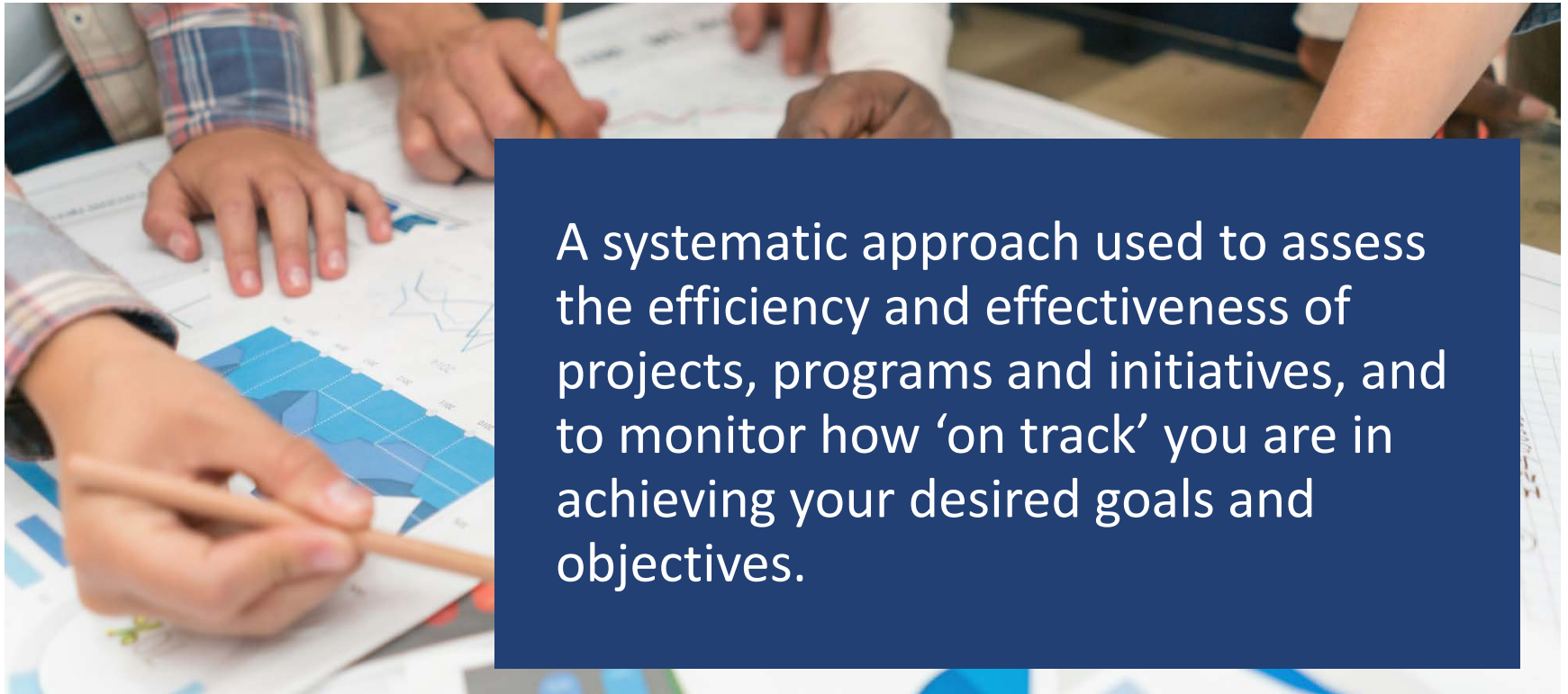
Component	Description	Estimated time commitment	Already have?	Capacity/interest in completing?	Include in workplan?	Toolkit component
Strategic areas*	Identify the strategic areas or broad subjects to focus on (e.g., business retention & expansion; entrepreneurial development; downtown improvement)	30-60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

PERFORMANCE MEASUREMENT TOOLKIT

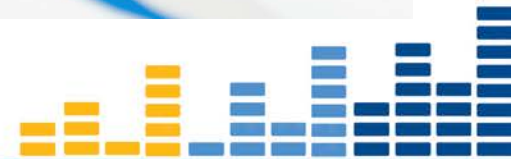
FOR LOCAL ECONOMIC DEVELOPMENT



WHAT IS PERFORMANCE MEASUREMENT?



A systematic approach used to assess the efficiency and effectiveness of projects, programs and initiatives, and to monitor how 'on track' you are in achieving your desired goals and objectives.



WHY UNDERTAKE PERFORMANCE MEASUREMENT?

- Ensures time being spent on high-value activities
- Builds momentum and buy-in from your stakeholders
- Assesses effectiveness of your program or project
- Supports informed and evidence-based decision-making
- Demonstrates your success and progress
- Keeps you on target and accountable to your stakeholders



PERFORMANCE MEASUREMENT TOOLKIT

BARRIERS TO SUCCESS

Common
barriers to
success



- No Time or resources
- Can't measure
- Reluctant to measure
- No Incentive



HOW TO BREAK THROUGH BARRIERS?

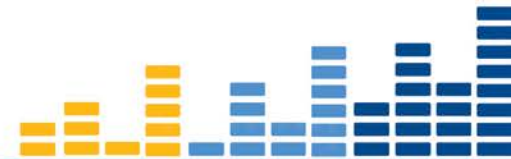
Make performance measurement part of your organizational culture

Performance measurement is continuous process requiring flexibility & adaptability

Encourage stakeholder participation to ensure that everyone is on the same page

Recruit and engage senior leaders

Communicate the purpose of performance measurement



PERFORMANCE MEASUREMENT TOOLKIT

TOOLKIT BENEFITS

- ✓ Familiarize you with key concepts
- ✓ Allows you to choose tailored approach specific to your needs
- ✓ Walks you step-by-step through process including collecting and reporting on the most relevant indicators
- ✓ Facilitates process as “learning by doing” approach with templates, mini-guides, and B.C. examples
- ✓ Scalable to size of initiative, resources and capacity
- ✓ Links desired outcomes with activities and outputs



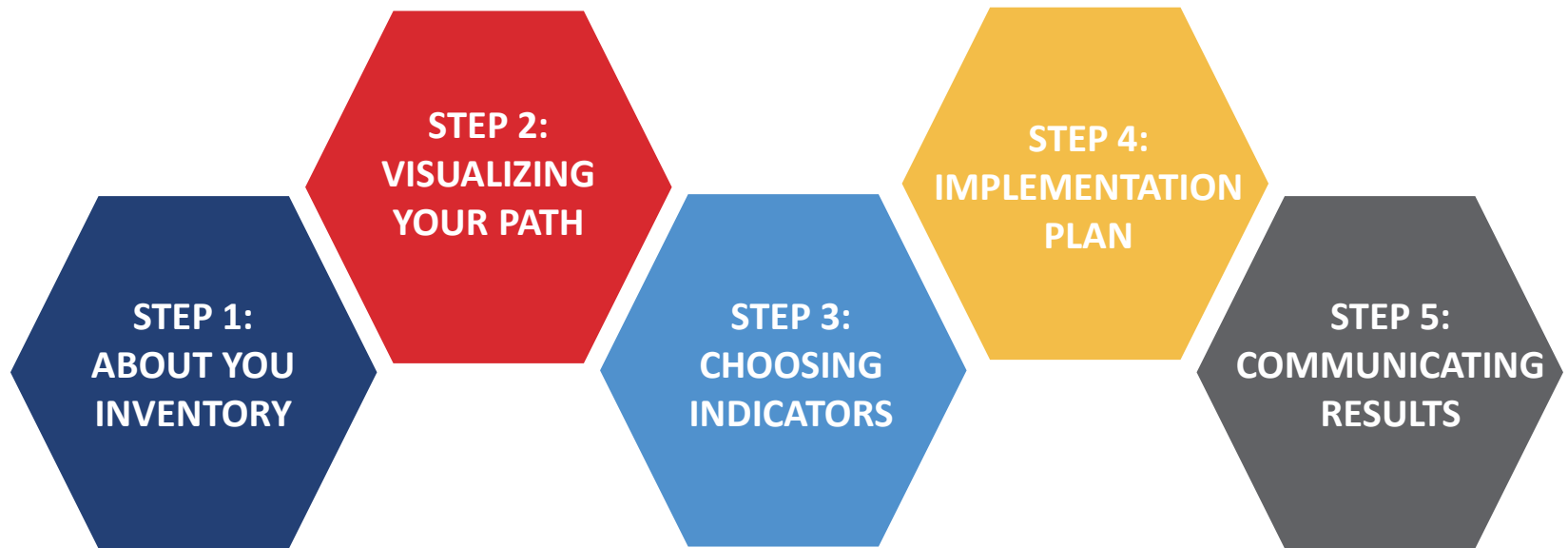
TOOLKIT COMPONENTS

- ✓ **Toolkit User Guide**
- ✓ **Excel Workbook** consisting of a series of exercises
- ✓ **Library of 200+ indicators** across several economic development topics
- ✓ **Templates** for implementation plan, annual reports and dashboards
- ✓ **Image library** containing infographic style images available for download



TOOLKIT STRUCTURE

LINEAR PROCESS CONSISTING OF FIVE STEPS



>>> [Launch the Performance Measurement Toolkit](#)



STEP 1: ABOUT YOU INVENTORY

Take an inventory of your existing goals, available resources, current activities and measures to begin the process



PERFORMANCE MEASUREMENT TOOLKIT

INVENTORY WORKBOOK

Instructions: Determine your current state of economic development work by outlining your overall goal, available resources, activities and measures. Use your strategic or planning documents to inform your responses. This Workbook can be used for individual programs or projects (e.g. Business Walks initiative or full BRE program) or for your economic development function as a whole.

1. The ultimate outcome of this program/project is...

2. The resources/inputs we have available for this program/project are:

This could include:

- staff time
- funding
- partnerships
- committees
- existing programs
- existing services

3. The various activities that are being undertaken by this program/project are:

This could include
program categories
(sector development, BRE, communication)

or project activities
(business walks, skills training, consultation)

4. The indicators/measures we currently track or have asked to be tracked are:

Examples:

- jobs created
- business licences
- # contacts made
- website visits
- demographic info

>>> [Launch the Inventory Workbook](#)



PERFORMANCE MEASUREMENT TOOLKIT

STEP 2: VISUALIZING YOUR PATH

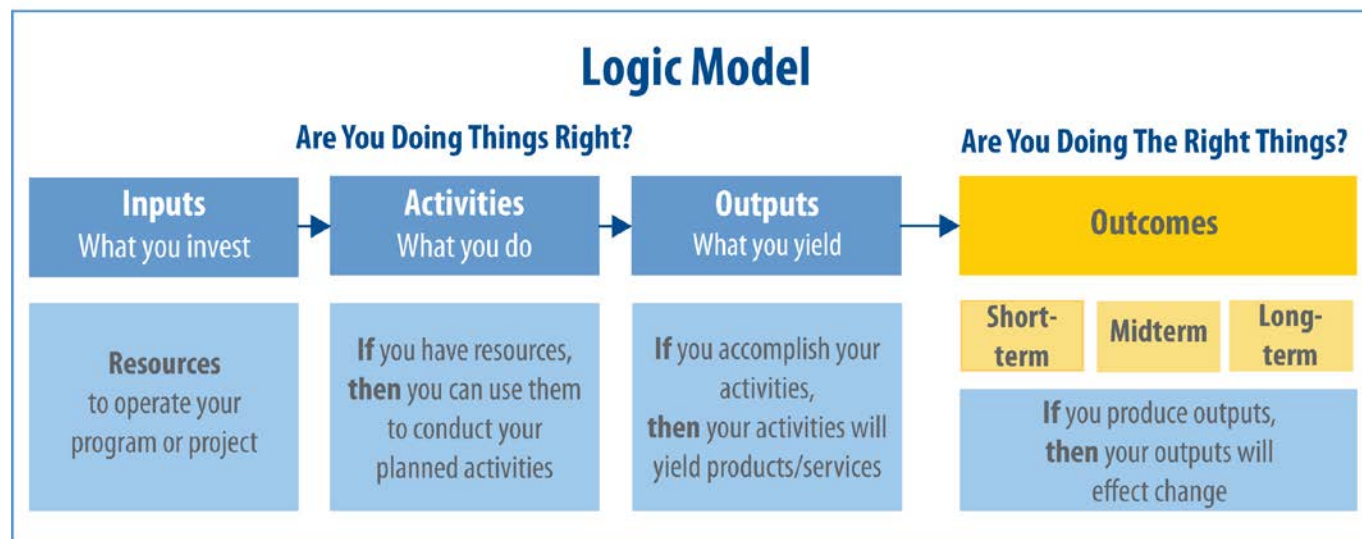
Visualize the entirety of
your program or project
from where you are now to
where you want to go



PERFORMANCE MEASUREMENT TOOLKIT

LOGIC MODEL

A graphic illustration that shows the connections between what you invest, what you do and what you achieve.



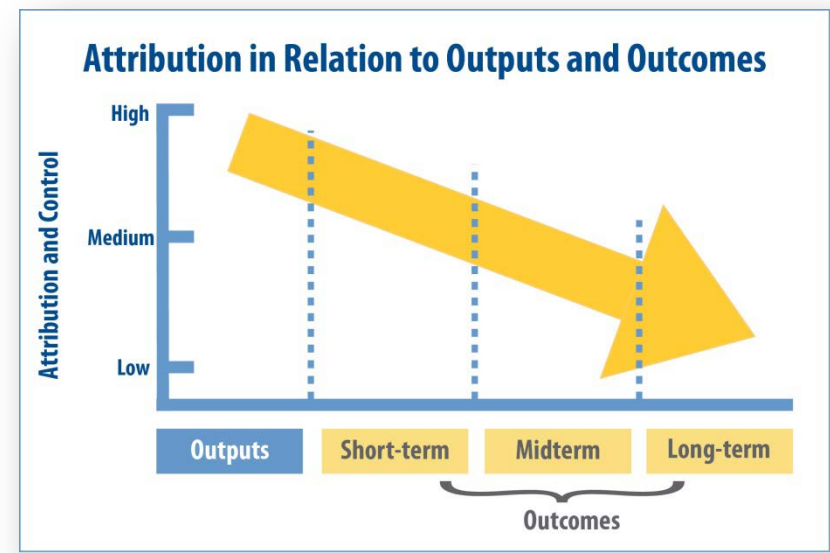
OUTPUTS VS. OUTSOMES

Outputs:

- Represent the WHAT activities will yield
- Set the stage for your outcomes

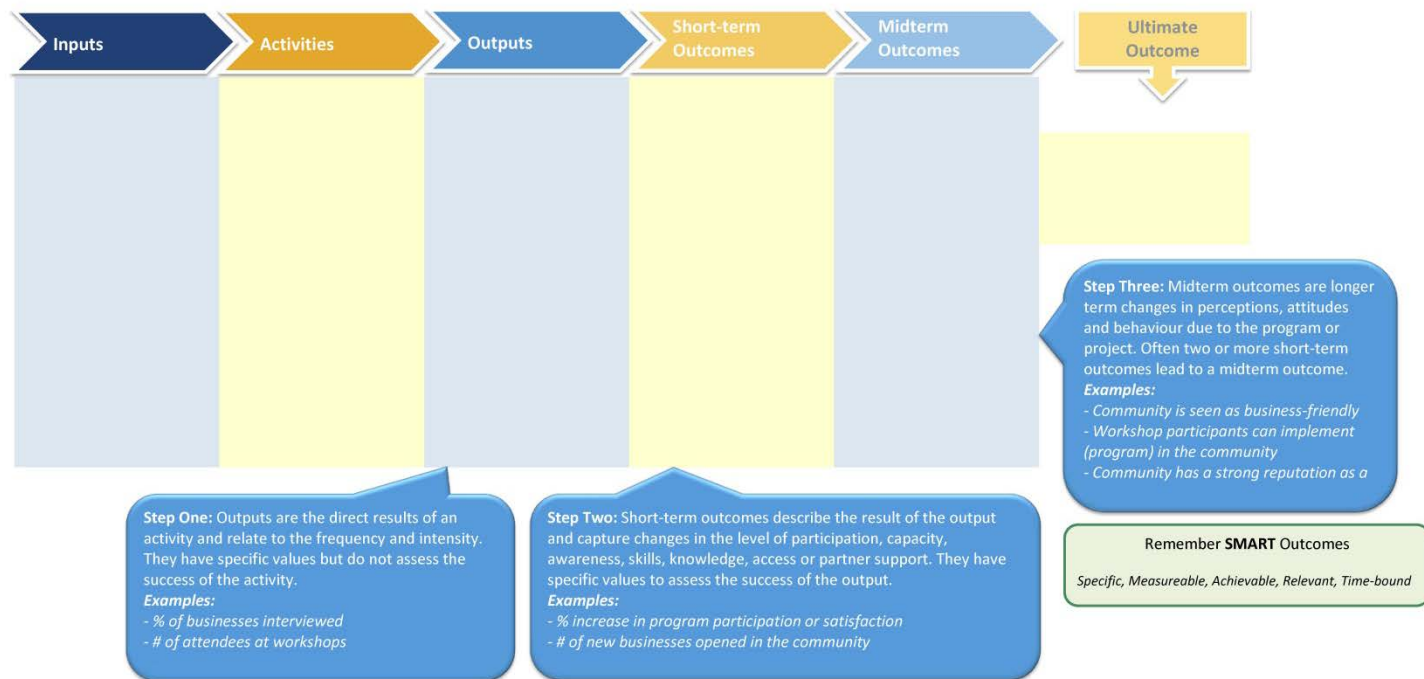
Outcomes:

- Represent the WHY
- SMART (Specific, Measurable, Achievable, Relevant & Timely)
- Act as the finish line (the ultimate outcome)



LOGIC MODEL WORKBOOK

Instructions: A logic model is a visual representation of how your program or project's activities contribute to its ultimate outcome. The inputs, activities and ultimate outcome have been autofilled from the **About You - Inventory** tab. Follow the three steps below to identify the outputs and outcomes to complete your draft logic model. Once complete, it will inform the next step of determining measurement indicators. Proceed to the **Indicators - Long List** tab.



>>> [Launch the Logic Model Workbook](#)



STEP 3: CHOOSING INDICATORS

**Choose performance indicators
for tracking the progress of
your program or project**



PERFORMANCE INDICATORS

Are used to track outputs and outcomes of your activities, and assess what kinds of changes have occurred

Can take the form of numbers, facts, opinions, or perceptions that help measure progress towards change

Output indicators measure the direct result of an activity and indicate the frequency or intensity

Outcome indicators measure the effectiveness or impact of your performance measurement strategy



INDICATOR LIBRARY

Subject	Indicator	Quantity	Unit	Data Type	Method	Source
Business - general	Businesses total	Businesses	#	Secondary	on-line search	Statistics Canada
Business - general	Business total/by category	Businesses	#	Secondary	on-line search	Local Government
Business - general	Businesses by industry	Businesses	#, %	Secondary	on-line search	Statistics Canada
Business - general	Business Incorporations	Businesses	#	Secondary	on-line search	BC Stats
Business - general	Businesses by employment size	Businesses	#, %	Secondary	on-line search	Statistics Canada
Business - general	Businesses created (by industry or sector) versus all businesses	Businesses	#, %	Primary	ED tracking system	
Business - general	Entrepreneurs	Entrepreneurs	#	Primary	Directory development	
Business - general	Availability and cost of business inputs (tax rates, energy, labour)	various	#, \$	Secondary	on-line search	Invest BC
Business - general	Business climate rating	inter-community comparison	rank; qualitative	Primary	Specialized survey	
Business - general	Business program participants still in business 1 - 5 years	Businesses	#	Primary	local tracking system (BRE)	
Business - general	Ease of doing business	Business climate	ranking, rating, qualitative	Primary	local tracking system (BRE)	
Business - general	Labor force productivity	Workers	#, rating, qualitative	Primary	local tracking system (BRE)	
Business - general	Satisfaction rating of public services	Business climate	ranking, survey, qualitative	Primary	local tracking system (BRE)	
Business - general	Increased diversity of businesses in the economy	Business	ratio	Primary	local tracking system (BRE)	
Business - general	Access to business conference space/meeting facilities	Facilities	#	Primary	ED tracking system	
Business attraction	Business openings	Businesses	#, %	Primary	Business License	
Business attraction	Businesses attracted (by industry or sector) versus all businesses	Businesses	#, %, qualitative	Primary	ED tracking system	
Business attraction	Business leads that choose to locate in community/region	Businesses	#, %, qualitative	Primary	ED tracking system	
Business attraction	Presence and quality of assistance programs	Investments	#, survey, qualitative	Primary	local tracking system (BRE)	
Business attraction	Branding efforts launched	Strategies	#, click rates, success measures	Primary	ED tracking system	
Business attraction	FDI attracted to the community	Investment	#, \$	Primary	ED tracking system	
Business attraction	Timeline for project completion	Project	#	Primary	ED tracking system	
Business creation	Availability of startup capital for local businesses	Investment	\$	Primary	ED tracking system	
Business creation	New business startups (% of all)	Businesses	#, %	Primary	ED tracking system	
Business retention	Business closures	Businesses	#, %, qualitative	Primary	Business License	
Business retention	Businesses retained (by industry or sector) versus all businesses	Businesses	#, %	Primary	local tracking system (BRE)	
Business retention	Businesses expanded (by industry or sector) versus all businesses	Businesses	#, %	Primary	local tracking system (BRE)	
Business retention	Succession plans, transfers to new owners	Plans, Transfers	#, qualitative	Primary	local tracking system (BRE)	
Business retention	Sales revenue	Revenue	\$	Primary	local tracking system (BRE)	
Business retention	Profitability	Net income	\$	Primary	local tracking system (BRE)	
Business retention	Productivity	Revenue per worker	\$	Primary	local tracking system (BRE)	
Business retention	New products, product lines, services	Productive capacity	#, qualitative	Primary	local tracking system (BRE)	

Get help from our library of over 200 indicators



PERFORMANCE MEASUREMENT TOOLKIT

STEP 4: IMPLEMENTATION PLAN

Establish a plan to track your performance that is practical, achievable and directly relates to your activities



PERFORMANCE MEASUREMENT TOOLKIT

COMPONENTS



TEMPLATE

Who is responsible for data collection, tracking, analyzing, reporting?

How will you collect data and when?

Who will be receiving this information?

How often will this indicator be reported on?

Optional: What is the starting point from which you can measure progress?

Optional: What target is being set for this indicator, over what timeframe?

[illegible]

PERFORMANCE MEASUREMENT TOOLKIT

STEP 5: COMMUNICATING RESULTS

Communicate the progress and success of your program or project to your stakeholders



PERFORMANCE MEASUREMENT TOOLKIT

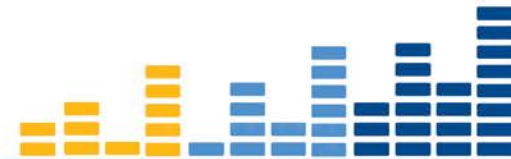
WHAT IS A DASHBOARD?

Simple visual presentation of your performance measurement indicators

Clearly state the purpose relevant to the intended audience

Choose a few main indicators to focus on and make them central to your choice of report

Use a well designed, easy-to-read layout








TEMPLATES AND EXAMPLES

Dashboard Templates

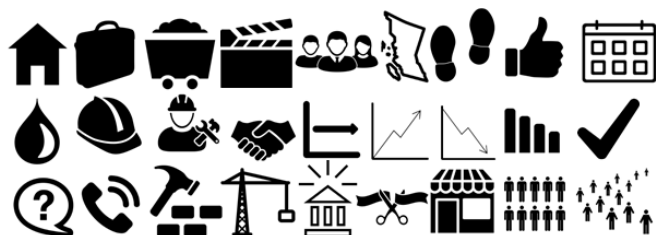
How To Use

This document is comprised of a series of templates to help you set up a basic dashboard for your indicators. This visual representation can then be used in all forms of reporting as a starting point and way to visualize your progress. For each template, a few examples have been populated so that you can see how the design works. Since they are built using simple shapes and icons, the colours, size, orientation and content can all be customized to your needs. We recommend deleting the templates you don't need to speed up the document's editing speed.

Icons

Some of the icons are just shapes drawn with Word or character symbols: ↓ ↑ ! ★      These can all be fully customized or easily created, layered, grouped and oriented using the "Format" tab.

Other icons can be retrieved easily online and imported into the template. There are many different websites, though we have found thenounproject.com to have a great, user-friendly selection. Here is a selection to get you started:



If you need any support using this resource or would like some graphic assistance, please contact the Regional Economic Policy and Programs Branch at economicdevelopment@gov.bc.ca

Use plain text to search for your desired subject, then drag and drop the icon onto your desktop. You can then drag the icon from your desktop right into the folder. To make it easy to drag and drop within Word, click on Format → Wrap Text → In Front of Text.



This style of reporting uses graphics as the centrepiece to engage the audience on specific subjects. It is simple, clean and eye-catching. The borders can either all be used in the same colour, or can be customized to represent the status/progress of the indicator. The example shown demonstrates the progress towards achieving the targets set, although any parameters can be used to differentiate using a simple colour scheme.

The border colours can be easily customized using the format tab.

The Noun Project icons tend to work very well for this style of graphic.



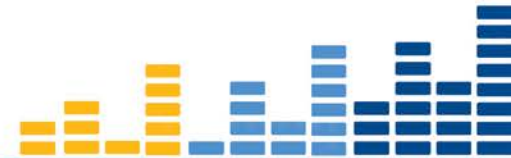
PERFORMANCE MEASUREMENT TOOLKIT

THANK YOU!

QUESTIONS?

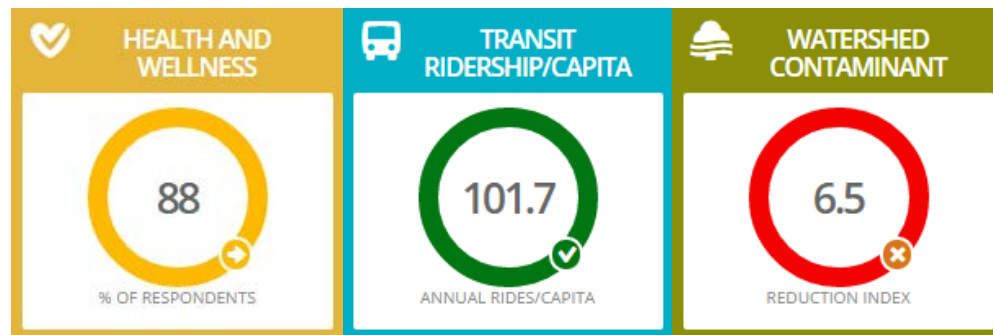


For more information: gov.bc.ca/economicdevelopment



PERFORMANCE MEASUREMENT TOOLKIT

TEMPLATES AND EXAMPLES



Source: Edmonton's Citizen Dashboard <https://dashboard.edmonton.ca/>