

STRATEGIC ASSESSMENT

DESCRIPTION

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

RATIONALE

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

LOGISTICS

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

OUTPUT

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

PROCESS

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





CUSTOMIZE

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

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

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

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

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

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

TIPS

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