

# Columbia Shuswap Regional District Shuswap Economic Development Strategy

## Proposal of Services



Submitted by:  
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Submitted to:  
Robyn Cyr, Economic Development Officer  
Columbia Shuswap Regional District  
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Salmon Arm, BC V1E 4P1  
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# COVER LETTER

April 6, 2017

**VIA EMAIL:** rcyr@csrd.bc.ca

Robyn Cyr  
Economic Development Officer  
Columbia Shuswap Regional District  
555 Harbourfront Drive N.E.  
P.O. Box 978  
Salmon Arm, BC V1E 4P1

Dear Robyn:

## **Re Proposal – Shuswap Economic Development Strategy**

EDCD Consulting is pleased to submit our Proposal of Services to provide consulting services for assisting the Columbia Shuswap Regional District in developing an economic development strategy for the Shuswap Economic Development department. We have read and acknowledge your Request for Proposal and its terms.

EDCD Consulting is entering its tenth year of business and we bring together a wealth of experience and expertise. Our Senior Partners, Dale Wheeldon and Colleen Bond, have a combined 45 plus years of economic development experience including years spent as economic development professionals in communities of various sizes. What this means for your project is that we understand what actually works like no other firm can. We design programs and implementation plans that are realistic and doable.

We have real experience in creating and implementing economic development services – both for communities we have worked in as economic development professionals, and during our past ten years as consultants within the industry. We have worked with many communities to establish their economic development services and our Proposal of Services leverages our wealth of industry experience and expertise.

We have identified a number of projects we have worked on in our proposal that specifically address similar services we have provided for other clients and demonstrate our extensive economic development experience. One of the project examples is the workshops we delivered for the Province of BC. We are extremely proud of the workshops we have delivered to over 30

communities throughout BC. Dale and Colleen have been the sole content developers and facilitators for all workshops. The content is based on industry trends and our in-depth knowledge, expertise and experience within economic development. One of the key components of the workshop is providing participants with information on economic development strategic planning.

On March 1, 2016 we delivered a workshop in Sicamous. The workshop was well attended and demonstrated a real interest in economic development. During the workshop, we had participants identify and prioritize economic development initiatives. There were a number of excellent initiatives suggested around Business Retention and Expansion, as well as, general economic development.



Our Proposal of Services provides the scope of work we will undertake to complete this project. We will begin with ensuring our proposed work plan is approved by the Columbia Shuswap Economic Development Advisory Committee and that we are all on the same page as we begin the project. We have outlined a specific stakeholder engagement process to ensure the communities, sub-regions and all stakeholders are heard. The final strategy report will be unique to the region based on the research and community engagement. The plan will include identification of economic development initiatives and a detailed implementation plan. Currently, BC communities and regions have the ability to apply for funding from the BC Rural Dividend Fund. Our plan will highlight specific initiatives that would be eligible for funding and will be completed in time to submit applications in the fall of 2017. The following pages provide additional details on our process and methodology.

Your consideration of our proposal is greatly appreciated. We welcome your questions and are open to further customizing our scope of work to maximize value.

Yours truly,

A handwritten signature in black ink, appearing to read 'Colleen Bond'.

Colleen Bond, Partner  
EDCD Consulting

## EXECUTIVE SUMMARY

We are pleased to provide our Proposal of Services to deliver an Economic Development Strategy for the Shuswap Economic Development Department. The Shuswap Economic Development Strategy geographic area will include the communities of Sicamous, CSRD Electoral Area C (South Shuswap), CSRD Electoral Area D (Deep Creek/Salmon Valley/Falkland), CSRD Electoral Area E (Malakwa/Swansea Point), and CSRD Electoral Area F (North Shuswap).

Our proposal is based on our extensive experience in developing strategies for communities, facilitating comprehensive public engagement processes, knowledge of how regional economies work and the unique factors of rural communities.

We will begin by visiting the area to meet with the CSRD Shuswap Economic Development Advisory Committee to ensure the work plan is approved and project roles and responsibilities are clearly understood. During our first meeting we will deliver a facilitated discussion/session to provide an opportunity for everyone to understand traditional economic development and community economic development. After the meeting we will tour the area (sub-regions) to view key assets and to see in person the work that has been done in the region to support economic opportunities.

Our next steps will include a review of past studies, reports, etc. along with completing an economic and demographic analysis of the project's geographic area. This information will give our team a good understanding of what's been happening in the area and begin to help us identify the competitive/locational advantages and trends.

During the first meeting we will have started to identify the key stakeholders that need to be engaged in the strategic planning process along with outlining a specific and comprehensive public engagement plan. We will submit our public engagement plan for approval prior to returning to the area to begin the process.

Our second visit will be to undertake public and stakeholder engagement. Our proposal outlines the various methods that we utilize to ensure as many individuals and businesses are engaged. It is expected that a mix of one-on-one meetings with individuals, focus groups involving key sectors, organizations, youth and seniors, business retention and expansion type interviews and public meetings where appropriate will be used. In addition to our time in the region we will also develop an on-line survey to ensure the broader public has the opportunity to be involved.

After the public engagement process is completed we will compile the information received into an Engagement Synopsis report. We will return to the area to meet with the Committee to deliver the report and present findings along with a project status update.

All of the information and intelligence from the previous steps will be thoroughly analyzed by our team. We will then further build on the key themes, strategic directions, opportunities and actions plans to build a draft plan. The draft document will be delivered to the Committee for comment and approval before we complete the final strategy.

The final strategy will incorporate any feedback received from the Committee and we will visit the area to present the strategy to the Committee and other stakeholders as required.

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# EXPERIENCE, REPUTATION AND RESOURCES

## **EDCD Consulting**

Okanagan Region: 2155 Shamrock Drive, West Kelowna, BC V4T 1T9

Vancouver Region: 5428 Highroad Crescent, Chilliwack, BC V2R 3Y1

**Contact for Proposal:** Colleen Bond, Partner  
bond@edcdconsulting.com  
250-808-2905

**Additional Contact:** Dale Wheeldon, Partner  
wheeldon@edcdconsulting.com  
604-819-3809

**Project Team Leader:** Colleen Bond

**Employees:** Senior Partners – 2  
Senior Associates – 1  
Junior Associates – 2

## **Overview of Company – About Us**

**EDCD Consulting** is a partnership firm entering its tenth year in business with its senior partners bringing over 45 years of in-depth economic development experience. We are proud of our targeted approach, providing communities with economic development specialization unlike any other. Our approach is unique because Dale and Colleen have been economic development professionals in their communities. We understand what works and what doesn't because we've been there. This unique "on the ground" economic development experience positions us to understand the challenges that communities and economic development professionals face.

EDCD Consulting provides a team fully committed and engaged in every project, playing a hands-on role in community engagement, coordinating and managing the collection of data, research and input, identifying target industries, creating the tools necessary to attract, retain and expand investment, crafting recommendations, and developing successful strategies. We believe that no two economic development strategies should be the same and should instead be focused on the unique needs and resources of a specific community or region. We have two locations with offices in the Greater Vancouver region and the Okanagan.

## Experience

Our team has prepared economic development plans and strategies for communities and organizations of various sizes including:

- Regional District Central Kootenay – Slocan Valley
- District of Fraser Lake
- District of Houston
- City of Kamloops
- City of Merritt
- Cowichan Regional District
- City of Nanaimo
- City of Pitt Meadows
- District of Logan Lake
- Squamish-Lillooet Regional District
- Regional District of Okanagan-Similkameen
- District of Tumbler Ridge

In addition to the economic development strategies and plans we have completed, our team has undertaken a wide variety of other projects including:

- **Economic Development Building Blocks** – Delivered 30 workshops for the Province of BC and throughout the province in 2016/17. These workshops were Phase 2 of the Province’s commitment to enhancing economic development in rural communities.
- **Economic Development Essentials for Local Leader Workshops** – Delivered workshops for the Province of BC in 25 communities
- **Investment Readiness Assessments** – District of Tofino, District of Squamish, City of Kamloops, City of Nanaimo, District of Logan Lake, Cowichan Valley Regional District
- **Business Retention and Expansion Programs** – District of Squamish, City of Vernon, District of Powell River, City of Penticton, City of Dawson Creek, District of Mission
- **Community Profiles and Investor/Site Selector Guides** – City of Coquitlam, District of Squamish, District of Powell River, City of Powell River, City of Campbell River, District of Logan Lake, Province of BC, Cowichan Valley Regional District
- **Economic Development “How to” Manuals** – Province of Alberta, Economic Developers Alberta, Province of Saskatchewan, British Columbia Economic Development Association
- **Site Selector Database and Sector Fact Sheets** – City of Coquitlam, City of Campbell River, Cowichan Valley Regional District, City of Pitt Meadows, City of Nanaimo, City of Vernon

## Project Lead and Team Members

EDCD Consulting brings decades of experience in economic development, community development, tourism and stakeholder facilitation. Resumes for the senior partners are provided. No sub-consultants will be utilized for this project.

**Colleen Bond** – Colleen is a partner with EDCD and has over 23 years economic development experience. She has her diploma in Economic Development from the University of Waterloo and is a certified Economic Developer. Colleen has extensive knowledge in building economic development programs and delivering practical and realistic strategic plans. Colleen’s specialties include business retention and expansion and entrepreneurship.

*Role: Economic development consultation, research, analysis and writing.  
Colleen will be the Project Lead.*



**Dale Wheeldon** – Dale is a partner with EDCD and brings over 25 years of knowledge along with a varied background in economic development and local government. Dale is a frequent speaker at economic development events and seminars and has been retained as an instructor by the International Economic Development Council (IEDC). Dale’s specialties include local government policies, land management and agriculture.

*Role: Economic development consultation, stakeholder facilitation and research.*



**Geoff Millar** – Before joining EDCD, Geoff was an economic development professional in a number of communities, most recently on Vancouver Island. Geoff delivered both economic development and tourism services to Cowichan Valley region for over 14 years. Prior to moving to Vancouver Island, Geoff lived in the Okanagan providing economic development and tourism services in Summerland. Geoff’s specialties include the tourism and agriculture sector.

*Role: Economic development consultation and research.*



**Jordan Howard** – Jordan has a wide range of experience and knowledge. He has recently returned after taking a year to travel the globe. The new perspective he’s gained combined with the completion of his Bachelor of Business Administration is an asset to the firm.

*Role: Economic development research, analysis, writing and graphic design.*



**Ashleigh Volcz** – Ashleigh has a wide range of experience and knowledge in economic development. Her work includes research, design and coordination of economic development projects and programs.

*Role: Project management, data collection and graphic design.*



## Resources

EDCD Consulting has the capacity and necessary resources to complete the project within the prescribed timeframe as indicated in the RFP (delivery of final strategy November 30, 2017). The RFP states “a strategic planning process take over six months”. Our team has the capacity and resources required to complete this project within the six month timeframe. Timeline details can be found on page 24, however, you will note that we will deliver the final strategy October 31, 2017. By reducing the time by one month it will allow for an improved budgetary process for the Regional District and for potential applications to the BC Rural Dividend Fund. In the past there has been a call for applications by October 31. In order to assist with BC Rural Dividend Fund applications, EDCD Consulting will identify some initial time sensitive projects before application deadline in order to allow for applications to be prepared and submitted. EDCD can assist with the application process.

## Strategic Consulting

### **Explain your understanding and views on Community Economic Development.**

There is no simple definition of economic development that one can look at and say “that’s it.” From our 25 plus years of experience we have found that economic development must be defined by the community for the community. Each town, city, region or even province has its own unique set of challenges for economic development. Therefore there is no single strategy, policy or program for achieving successful economic development. The term “community economic development and “economic development” used to have two distinct meanings to those involved in the industry. Community Economic Development (CED) used to primarily focus on the quality of life factors including parks, housing, social programs, community facilities, education, medical services, etc. Economic Development (ED) focused on attracting new industries, business retention, workforce, transportation, and the business climate. It has become evident in today’s ever changing economy that successful communities and organizations focus on a combination of both. We believe it is impossible to achieve sustainable CED without effective ED and vice versa.

### **Describe the role of an economic development organization in local government.**

The most important factor in the success of a local economic development organization is leadership. Those who serve in leadership positions such as economic development practitioners, board members, committee chairs, task force leaders and other volunteers and stakeholders need to be knowledgeable of the basics of economic development and be committed to applying their knowledge in ways that serve local government and the best interests of the community or region.

### **How do you maximize the impact of an economic development organization in a community?**

A local economic development organization is in the business of improving the economy of its community and providing a higher quality of life for existing and potential residents. The organization needs to be structured appropriately with a clearly stated mission that is understood by all stakeholders. The organization needs to have commitment from the community, its stakeholders and local or regional government needs to provide sufficient, long-term funding to ensure the ability exists for the implementation of effective and sustainable economic development initiatives. Strategies that are developed must be completed to maximize the investment, both financial and human, made by the community or region and to show value based on identified needs.

The challenge in many communities undertaking economic development is to make sure that there are no redundancies and that all organizations are pulling together in the same direction to maximize economic impact and return on investment. When we develop strategies we work to ensure that it uses the assets/capacity of the organization, and partner organizations, to successfully implement its goals and associated initiatives.

### What is your strategy development process?



Economic development strategic planning provides a roadmap for success – it is about envisioning a desirable future and laying out the strategies and actions to lead the community to that future. We believe the strategic planning process should proceed in a systematic, step-by-step manner. Since each step in the process depends on the one that precedes it, the various steps should be taken in order. These steps are as follows:

- We believe the pre-planning process to be the starting point for successful strategic planning. Pre-planning includes selecting members of a strategic planning team, developing a schedule and budget for the process, arranging stakeholder and public involvement and having a plan to inform stakeholders of progress.
- One of our first steps is to understand economic and demographic data for the community based on research, analysis, trends and forecasting. The information collected will work to form a SWOT analysis and identify competitive/locational advantages and will be combined with the public input and dialogue to gain a better understanding of the community.
- Stakeholder and public engagement is a critical component of strategic planning and is vital for a successful planning process. It is important to identify the stakeholders in the community to be included along with how the broader public will be involved. We believe a number of methods should be incorporated into the engagement process. These methods can include:
  - Individual meetings (key stakeholders, businesses, local government, First Nations, etc.)
  - Focus groups (sector-based, organizations, newcomers, etc.)
  - Public meetings
  - Youth and senior engagement
  - Coffee shop chats

- Surveys

The information collected during the public engagement process will significantly contribute to the SWOT analysis.

- If a separate economic development vision is desired, a well-written vision statement, regardless of the size and nature of the community should have the following characteristics:
  - Easily understood by all stakeholders
  - Brief yet clear and comprehensive in meaning
  - Challenging yet attainable
  - Capable of creating unity of purpose among stakeholders
  - Not concerned with numbers, percentages, or other quantitative data

An example of an economic development vision statement for a sample community is: My community will be a thriving community with a balanced economy, high-value jobs and an attractive quality of life.

- Strategic direction will begin to fall into place as the public consultation and SWOT analysis is completed. As the strategic plan starts to develop there are some guiding questions to answer:
  - How can we strengthen existing businesses and attract new ones?
  - How do we improve quality of life for both current residents and future residents?
  - What is our strategic direction to ensure sustainable economic development?

Identifying clear goals that are aspirational but achievable and connected to the strategic direction. We believe goals needs to be realistic and based on an organization's resources, both financial and human. We also believe success lies within the small wins that economic development can accomplish.

- Once strategic direction and the goals are identified and prioritized there needs to be a concise implementation plan. Goals without a detailed plan usually remain unimplemented and the plan becomes a document on a shelf. Every strategic plan we develop includes a detailed action and implementation matrix that outlines how to achieve the goal. Our matrix includes:
  - Step by step actions
  - Timelines
  - Who's taking the lead
  - Potential partners
  - Potential funders
  - Performance measurements
- Performance measures are an important component of our strategic planning process. We include tools and measurements to assess the efficiency and effectiveness of each goal, program or initiative. Performance measures help to demonstrate the value of an economic development organization, builds community support and allows an organization to show its success and progress.

- After the strategy process is complete and implementation is taking place we highly recommend an annual strategy review. A review helps the economic development organization know they are reaching their goals and targets, ensures the strategy still reflects local needs and priorities, assists in communicating out successes and helps to develop the upcoming year's work plan.

## Consulting Services

### **Describe how you lead strategy development to gain consensus among diverse stakeholder needs and any relevant experience in economic development.**

Our team has extensive experience in economic development and in facilitating discussions to gain consensus among diverse groups. Colleen and Dale have a combined 45 plus years' experience in economic development. Over half of our experience consists of "on the ground" economic development. Both Colleen and Dale have been Economic Development Officers in communities ranging in size from less than 5,000 to a region over 160,000. This experience translates into an economic development understanding that is unique and serves our clients well. We actually understand from the perspective of only those that have been involved with feet on the ground can.

The economic development planning process must strive to build consensus among board members, stakeholders and the community as a whole, creating a unified vision for the future. Through a well-managed public consultation process you can help to build consensus among stakeholders who represent different values and interests. In our experience, consensus can be difficult to achieve unless people come with an open mind and a desire to recognize the values that others represent. We have found that most people will indeed buy in to a longer term vision through an open engagement process. This process allows stakeholders to recognize that although their specific wants may not be directly incorporated into a plan, they can be achieved through the broader initiatives.

### **Describe your team's experience with educating and training economic development staff and their stakeholders.**

EDCD Consulting has been contracted by the Province of British Columbia to provide economic development training with a focus on providing the training into rural communities. The project began in November 2012 with our team developing content for the delivery of 15 Economic Development Essentials Workshops (delivery of the 15 workshops took place in 2013). Content included:

- What is economic development;
- Role of local leaders and economic development professionals
- Strategic planning
- Economic Development models and structures
- Investment readiness and attraction
- Business retention and attraction
- Sector development
- Workforce development
- Resident attraction; and tourism

The workshops were delivered to communities throughout the Province and were attended by local leaders, key community stakeholders and economic development practitioners. The workshops provide an excellent foundation of economic development and participants leave the day-long session inspired

and informed. The delivery approach is a combination of theoretical knowledge combined with on-the-ground experience told through examples and stories. Participants are led through various exercises throughout the day to increase knowledge and retention of the subject matter.

The workshops were very well received and the Province added an additional six (6) workshops which were delivered in 2014. In 2015 we were contracted by the Province to deliver 15 additional workshops with a refresh to content delivery. In addition to the refreshed workshop our team developed two business retention and expansion workshops. A community could choose one of the three workshops to have delivered. There were many communities who had participated in the first round of training who chose to take one of the BRE focused workshops. The 15 workshops were delivered in 2016 and in the early part of 2017. Again, there was excellent feedback by attendees and we are in discussion with the Province regarding their next phase.

## Experience

### **Demonstrate your team's experience in working with economic development organizations.**

EDCD Consulting has the benefit of working on both sides of economic development. Our senior partners and senior associate have been economic development practitioners in communities of various sizes – from less than 5,000 to over 160,000. These were commissions, municipal departments, economic development corporations and regional district structures. In addition, Dale is a past municipal councillor which gives him the unique perspective of understanding the challenges that elected officials face in achieving economic development. Our diverse experiences give us a particular advantage in working with economic development organizations as consultants. We truly understand the day to day activities and the internal and external pressures that organizations face. Our experience transfers into developing strategies and plans that are realistic and doable. Our strategies work towards building success and momentum to gain community buy-in, long-term commitment and economic sustainability. Most importantly we develop plans that do not sit on the shelf but instead form part of the working program of a community or region.

Our team has had the privilege of working with many organizations throughout Western Canada and Alaska over the past ten years. Our experience shows that organizations, regardless of size, need to have a clear plan and direction for economic development activities. Most recently, we have been working with the communities located within the Slocan Valley. We have worked with their economic development organization to deliver a strategic plan that is practical and doable based on their resources. Most of the communities within the Slocan Valley are new to economic development and we are pleased to have received comments including, “You have been able to take a complex economic development subject matter and made it relatable for rural communities.” The Regional Director for Area H also stated “These are the best reports with sound recommendations that we have ever received from consultants – thank you.” Our team prides itself on its ability to work with economic development organizations, local leaders, and community groups of any size and make the process easy to understand. We are able to deliver a plan that can be implemented.

### **Explain your understanding of the political and stakeholder environment in the economic development environment.**

There are a number of things that those in the political and stakeholder environment should know about economic development. We believe they need:

- To understand their community strengths and weaknesses. This understanding will help them to create a realistic vision and strategies for economic development.
- To understand their community’s place in the broader regional economy. This allows an improved opportunity to work with other jurisdictions to share responsibility for regional economic success.
- To understand how their economic development organization is structured and staffed. This provides a better understanding of what is actually possible to do and creates relationships with staff members who work on economic development issues daily.

EDCD Consulting is in the process of developing a manual for local leaders and other stakeholders to better understand their role in the economic development environment.

## Administrative

## References

<b>Client:</b>	<b>Village of New Denver</b>
<b>Project:</b>	<p><b>Slocan Valley Regional Economic Development Strategy</b></p> <p>The purpose of the project was to provide a foundational strategic and implementation plan for regional economic development collaboration between the Villages of Slocan, Silverton and New Denver and the unincorporated rural communities in the northern portion of Electoral Area “H” of the Central Kootenay Regional District (Slocan Valley). The project involved a comprehensive, facilitated engagement process to develop a three year, regional economic development strategy with tangible, capacity appropriate projects and an associated implementation plan. A key component of the project included a review of current economic development services and the recommendation for a new delivery model.</p>
<b>Contact:</b>	<p><b>Bruce Woodbury, Chief Administrative Officer</b>  <b>Village of New Denver</b>  <b>T. 250-358-2316</b>  <b>cao@newdenver.ca</b></p>

<b>Client:</b>	<b>District of Fraser Lake</b>
<b>Project(s):</b>	<p><b>Economic Development Strategy</b></p> <p>EDCD was contracted by the Province of BC to develop an economic development strategy for Fraser Lake. The community had recently seen the loss of one of their major employers and there was concern that the community lacked diversification to remain sustainable. We completed a plan with a strong community public consultation process including an open community meeting, Council meetings, online survey, business retention meetings, etc. The plan focuses on providing a roadmap that is realistic and achievable given the community’s current capacity for implementation. A detailed first</p>

	year implementation plan was developed with timelines, specific actions and budget costs.
<b>Contact:</b>	<b>Rick Braum</b> Regional Manager, Northwest Region Province of British Columbia T. 250-847-7797 rick.braam@gov.bc.ca
<b>Client:</b>	<b>District of Houston/Houston Chamber of Commerce</b>
<b>Project(s):</b>	<b>Economic Development Strategy</b> Houston Forest Products sawmill closed in May 2014 affecting 225 direct employees and up to another 500 workers locally. Houston contracted with EDCD to undertake an economic development strategy designed to strategically deal with the mill closure and to identify opportunities to help build a sustainable and diversified economy. The process included community consultation and detailed discussions with Council to determine future vision. The completed strategy included quick and easy wins for the community while identifying medium and longer term goals to work towards.
<b>Contact:</b>	<b>Maureen Czirfusz</b> Manager/Economic Development Officer Houston Chamber of Commerce T. 250-845-7640 manager@houstonchamber.ca

**Describe any relevant relationships with partners that might be relevant to our organization.**

Over the years our team has built economic development relationships throughout North America including international and provincial organizations, and individual community organizations involved in economic development. We have strong relationships with the Province of BC, specifically within the Ministry of Jobs, Tourism and Skills Training (JTST) and the Ministry of International Trade. We are very connected with the JTST’s regional economic development managers, including Richard Toperczer, who is responsible for the communities within the Columbia Shuswap.

We have excellent relationships with the Community Futures offices throughout the province. In the past we have worked with various Community Futures in various capacities and most recently in delivering economic development workshops in rural BC. This includes working with Rob Marshall for the delivery of a workshop in Sicamous on March 1, 2016.

The relationships we have built over the years have served not only us but our clients as well. We know who to call when a situation arises, when information is required or when funding opportunities present themselves.

**Rate Card**

Per diem rates for personnel working on the project are listed below. Any additional work outside the accepted and approved Scope of Work will be charged based on the following:

	<b>Per Diem Rate (8 HOURS)</b>
Colleen Bond, Partner	\$1,000
Dale Wheeldon, Partner	\$1,000
Geoff Millar, Senior Associate	\$650
Jordon Howard, Junior Associate	\$300
Ashleigh Volcz, Research Assistant	\$300
Meals/Per Diem Allowances	\$65
Mileage per kilometre	\$0.60

**Describe how you approach scoping and delivery of ongoing services to ensure cost effectiveness.**

Throughout our ten years of consulting we have managed every project on time and on budget. There has not been one project that has not met its milestones and delivery of product or service. We have established a project management system that organizes each project by individual step or activity and monitors budget. Our clients benefit from our process and can know where a project stands at any stage. Our management approach ensures our clients' projects are handled efficiently, transparently and cost effectively. For example, we completed an Investment Readiness Toolkit for the Province of Alberta and Economic Developers Association. We delivered a monthly progress report outlining progress to date and identifying any risks that may be associated with the project so that these risks could be mitigated as soon as possible. In addition, we participated in monthly conference calls to provide project updates including project status, budgetary items and suggested future directions to ensure a successful project.

# WORK PLAN, METHODOLOGY AND SCHEDULE

## Proposed Work Plan

This important planning project for the Columbia Shuswap Regional District involves the development of a Shuswap Economic Development Plan. The project was identified as one of the top priorities in the 2017 Shuswap Economic Development work plan. The strategy will identify opportunities for the Shuswap region over the next three to five years. For the purpose of this project the geographic area will include the communities of Sicamous, CSRD Electoral Area C (South Shuswap), CSRD Electoral Area D (Deep Creek/Salmon Valley/Falkland), CSRD Electoral Area E (Malakwa/Swansea Point) and CSRD Electoral Area F (North Shuswap). The proposed work plan is described in the following paragraphs (steps).

### 1. Getting Started – Kick-off Meeting

The project set up phase will set the tone for the entire process by defining expectations. Prior to beginning work on the project we will work with the CSRD Economic Development Advisory Committee to confirm project objectives and expectations. During our first visit to the community we will meet to confirm the following:

- Project roles and responsibilities
- Timeline for each step of the project, completion of deliverables
- Discuss requests for changes to the proposed work plan
- Contact points and staff responsibilities
- Identify public input and key stakeholder involvement resulting in an approved Stakeholder Engagement Plan

At this meeting our team would like to deliver an economic development overview to the CSRD Economic Development Advisory Committee and other individuals or representatives the Committee identifies to deliver a facilitated discussion/session to provide the community and economic development context. After the meeting we will stay to tour the area, meet with other key stakeholders, and visit key assets within the region that can play an instrumental role in future economic development activities.

### 2. Literature Review

Our team will conduct a desk review of the existing reports and data relating to the region's past and current economic development activities and efforts. During the "kick-off" meeting we will rely on the CSRD Economic Development Advisory Committee and Economic Development Officer to provide us with a list of reports and materials they believe should be included in our review. As per the RFP, at minimum, the following documents will be included in our review:

- Shuswap Agriculture Strategy
- Business Retention and Expansion Program research
- Shuswap Tourism Development Plan

### 3. Demographic and Economic Scan

During this time we will conduct an economic snapshot of the region and sub-regions. This snapshot will provide our team with a better understanding of the competitive/locational advantages,

economic and demographic trends, etc. Policies, trends and issues to be analyzed will include but not be limited to:

- Population growth trends
- Employment data and trends in terms of growth, employment/unemployment
- Trends in labour force data
- Income data and trends
- Reports on both economic and industry trends
- Current government policies, issues, trends and environmental factors that are likely to impact or have implication

The review will include an analysis of the existing local government policies, fees and tax structures that affect economic development in the designated geographic area for the project. The review will include recommendations that will be structured to improve existing policies in order to foster a sustainable economic development base while maintaining or enhancing the quality of life and the character of the sub-regions.

(Space inserted)

The above documentation and activities will be reviewed in order to:

- set the context for profile of leading industries and potential key and target sectors
- Understand the positive or negative impacts of current policies and programs on economic development
- Facilitate discussions to ensure an even understanding between participants

#### **4. Stakeholder Engagement Plan**

At the “kick off” meeting we will discuss the stakeholder engagement process including preliminary identification of individuals, groups, agencies, and other key stakeholders to be engaged. After the meeting our team will continue to develop the stakeholder engagement process and submit a draft engagement plan to the steering committee for review and modification as required.

Our team utilizes a number of methods to ensure the public has options for participation. The following methods will be identified in the Stakeholder Engagement Plan:

- one-on-one interviews
- focus groups
- community (public) meeting
- on-line engagement (survey)
- youth engagement

We will work with the CSRD Economic Development Advisory Committee and the Economic Development Officer to customize the stakeholder engagement plan so that it is appropriate for each sub-region.

As part of the engagement process we will work with the Economic Development Officer to review the extensive data collected through the BRE interviews completed to date. Together we will identify companies that identified opportunities or specific challenges. We will meet one-on-one with these businesses to gain a better understanding of their current situation/status. We have extensive experience in BRE and we can identify opportunities that may have been missed and potential

resolutions to challenges. The information collected from these interviews will form part of our SWOT and contribute to potential recommended strategies. We are familiar with the Executive Pulse platform as we introduced it to British Columbia, the web-based tool used for the CSRD's BRE program, and can add the data to the CSRD system to compliment the data already collected.

In addition to existing companies we would like to identify new businesses in the area that we can meet with to discuss topics including their reasons for investing in the region. This type of information is crucial in an effort to help support future messaging and to identify challenges that may have been faced and can be avoided in future efforts to attract and support new business in the region.

The community engagement process will involve comprehensive online engagement with the public throughout the study area. Along with the delivery of the Engagement Plan we will develop and deliver a survey. This survey will be designed to collect answers from the public regarding how they envision economic development, key priorities, that would help to ensure long-term success and the strengths and challenges of the area. We will work with the CSRD Economic Development Advisory Committee and Economic Development Officer to draft the survey prior to delivering a final survey for approval. It is intended the survey will be made available on-line during the engagement process (Step 5).

During the engagement process, if required, EDCD will develop and deliver "easy to understand" presentations and materials to provide an overview of trends in economic development in order to demonstrate reasonable outcomes. Our expertise in delivering workshops, combined with our knowledge of working in smaller communities as economic developers allows us to provide practical information that can lead to realistic initiatives.

## **5. Community Stakeholder Engagement**

Once the engagement plan has been approved our team will make the second visit to the region to complete the stakeholder engagement process. Prior to our visit we will have scheduled all meetings and, with the assistance of the Economic Development Officer, organized community meeting details as identified in the engagement plan. It is important to note that the engagement process will take place early in the overall strategic planning process to ensure the tourism months are taken into consideration.

## **6. Engagement Synopsis and SWOT**

Once the community engagement phase is complete, including the on-line survey, our team will begin to compile the information received into an Engagement Synopsis report. The report will summarize the feedback collected during the public consultation process. The public consultation process will provide information necessary to form part of our analysis of strengths, weaknesses, opportunities and threats (SWOT) as it relates to the position of the sub-regions to address issues and gaps, and identify opportunities. Our SWOT analysis will be utilized to:

- Confirm and/or identify "Where we are now"
- Confirm the sub-region's competitive advantages (strengths/assets) and disadvantages (weaknesses/constraints)
- Provide intelligence of existing gaps and potential opportunities
- Identify key strategic goals "Where do we want to go?"
- Set direction for what's most important

During our third community meeting, we will deliver the report and present findings along with a project status update to the CSRD Economic Development Advisory Committee.

## 7. Roadmap and Implementation Plan - Draft

All of the information, feedback and intelligence from the previous steps will be thoroughly analyzed by the team. We will then further build on the key themes, strategic directions, opportunities and action plans to build a draft plan. The draft plan will identify key objectives and strategies, partnering opportunities and identify strategies and specific actions.

An implementation plan will be prepared and will include the preparation of an action and implementation matrix (an example of which is shown below). It will include specific action steps, responsibilities, timelines, budget and financial and/or partnership opportunities for first year implementation. It will also include recommended specific performance indicators by which successes and/or failures can be measured.

Action and Implementation Matrix					
Action Plans			Implementation Strategy		
Actions	Key Stakeholders	Resources Required	Responsibility	Timeline	Budget

To know if the plan is working, it is important to have a plan in place to monitor and evaluate the implementation of the strategy and its actions. The plan will include monitoring and evaluation tools to guide the implementation by asking:

- Are our actions actually being implemented?
- Are our actions having the desired effect and outcome?

The draft document will be prepared and delivered to the CSRD Economic Development Advisory Committee as per the RFP (five copies). The report will identify the strategic opportunities to retain and attract new business and investment, to diversify the economy and to generate new wealth. Supporting implementation resources – samples, templates, worksheets, etc. – will be included in the final plan deliverable.

A benefit our team members bring to this project is our “on the ground” experience of working in organizations where we have created or restructured organizations to be more reflective of the community’s needs and to be accountable and cost effective. In other words, we have a clear understanding of the implementation steps required. Our plans include clear, specific steps and actions for implementation including timelines, responsibilities, partners, budget and other resources. The draft roadmap/implementation plan will be provided to the steering committee in preparation for public presentation.

## 8. Final Report Submission

Incorporating any additional feedback received, a final report will be completed and presented, our fourth community visit, to the CSRD Economic Development Advisory Committee for approval. We are prepared to present the final plan to other stakeholders as required. The final plan will be provided as required per the RFP (five copies) and in electronic format. We will include all supporting

information and a detailed implementation process that provides the specific steps necessary for successful completion.

**9. Lasting Relationship and Mentorship**

Once the plan and final presentation have been delivered, the EDCD team wants to keep in touch with you to see how you are doing. We want to hear from you as implementation takes place. We are happy to respond to your inquiries as you begin implementation. In addition, our team will touch base with you six months after the final report has been received to provide any follow-up you may require. EDCD takes great pride in continuing to work with our clients to help ensure success and make things happen as opposed to simply developing plans.

## Methodology

We have designed and developed a tailored approach to this assignment based on the parameters within the Request for Proposal. Our approach is based on consistent and sound project management principles. We use a people-focused community engagement approach that emphasizes broad and extensive participatory engagement methods in order to create collaborative environments that produce strategies and plans that are built on consensus. Our overall approach reflects the most efficient use of resources, is time sensitive and is cost effective.

## FINANCIAL EXPECTATIONS

The cost of the Scope of Work described in this proposal is \$47,150.00 for professional services inclusive of all travel and incidental costs and exclusive of applicable taxes (GST).

### Schedule of Hourly Rates

	<i>Hourly Rate</i>
Colleen Bond, Partner	\$125.00
Dale Wheeldon, Partner	\$125.00
Geoff Millar, Senior Associate	\$81.25
Jordon Howard, Junior Associate	\$37.50
Ashleigh Volcz, Research Assistant	\$37.50

### Proposed Payment Schedule

#### Project Payment Schedule

The following outlines the proposed schedule of payment. Each invoice will include details of work performed the number of hours worked for each day and date, the disbursements expended and the totals for the period.

Professional fees, including all disbursements, are quoted at \$47,150.00 (plus applicable taxes). The following is our proposed payment schedule based on 25% deposit and five equal monthly payments (6 total payments). We are happy to adjust the payment schedule as required.

Description	Amount (exclusive of GST)	Date
<b>Invoice 1</b> – 25% deposit	\$11,787.50	May 1, 2017
<b>Invoice 2</b> – 1 <sup>st</sup> monthly payment	\$7,072.50	June 30, 2017
<b>Invoice 3</b> – 2 <sup>nd</sup> monthly payment	\$7,072.50	July 31, 2017
<b>Invoice 4</b> – 3 <sup>rd</sup> monthly payment	\$7,072.50	August 31, 2017
<b>Invoice 5</b> – 4 <sup>th</sup> monthly payment	\$7,072.50	September 30, 2017
<b>Invoice 6</b> – 5 <sup>th</sup> monthly payment	\$7,072.50	October 31, 2017

### Total Estimated Cost of the Project

The following provides a breakdown of project costs by task, personnel and estimated times.

<b>Project Tasks in Days</b>	<b>EDCD (senior)</b>	<b>EDCD (Associate)</b>	<b>EDCD (staff)</b>	<b>Total</b>
<b>Getting Started – Kick-off Meeting (Community Visit)</b> Project confirmations – Economic development/ community development context – Community/sub- regional tour	3.0	3.0	0.0	6.0
<b>Literature Review</b> Identify all relevant material & resources – Review process	1.0	1.0	1.0	3.0
<b>Demographic and Economic Scan</b> Data collection and analysis of sub-regions	3.0	3.0	2.0	8.0
<b>Stakeholder Engagement Plan</b> Development and delivery of engagement plan – development and delivery of on-line survey	2.0	0.0	1.0	3.0
<b>Community Stakeholder Engagement (Community Visit)</b> Community input development and facilitation – data collection	10.0	2.0	0.0	12.0
<b>Engagement Synopsis &amp; SWOT (Community Visit)</b> Creation of an engagement synopsis – SWOT analysis – presentation of findings to Committee	6.0	2.0	1.0	9.0
<b>Roadmap and Implementation Plan (Draft)</b> Draft implementation plan including specific activities and actions required	6.0	3.0	1.0	10.0
<b>Final Report and Presentation (Community Visit)</b> Incorporate revisions from draft report, finalize and deliver report to Committee	4.0	1.0	2.0	7.0
<b>Total (Days)</b>	<b>35.0</b>	<b>15.0</b>	<b>8.0</b>	<b>58.0</b>
<b>Total (Hours)</b>	<b>280.0</b>	<b>120.0</b>	<b>64.0</b>	<b>464.0</b>
<b>Total (Fees)</b>				<b>\$47,150.00</b>
<b>Additional Fees:</b>				
<b>All fees (travels, disbursements, expenses) have been incorporated into the above. No additional costs will be charged unless contract requirements are changed or adjusted. Our Proposal of Services is based on four (4) community visits.</b>				<b>\$0</b>
Total Fees & Disbursements				\$47,150.00
Taxes – GST				\$2,357.50
<b>TOTAL inclusive of taxes and disbursements</b>				<b>\$49,507.50</b>

## TIMELINES

Our plan is based on completing the strategic planning process over six months. We have scheduled the contract starting May 1, 2017 and final project completion on October 31, 2017. This is one month prior to RFP requirement of a November 30, 2017 timeline. We believe the additional month saved will allow for an improved budgetary process for the Regional District and for potential applications to the BC Rural Dividend Fund. In the past there has been a call for applications by October 31. In order to assist with BC Rural Dividend Fund applications, EDCD Consulting will identify some initial time sensitive projects before the application deadline in order to allow for applications to be prepared and submitted. EDCD can assist with the application process.

The following table outlines the steps and deliverables. Dates may be adjusted according to actual project start date as required.

<b>Steps and Deliverables</b>	<b>Timeline</b>
Step 1: Getting Started – Kick-off Meeting Step 2: Literature Review & Economic Snapshot Step 3: Demographic and Economic Scan	May 31, 2017
Step 4: Stakeholder Engagement Plan Step 5: Community Engagement Process	June 30, 2017
Step 6: Engagement Synopsis and SWOT	July 31, 2017
Step 7: Roadmap and Implementation Plan (Draft)	September 15, 2017
Step 8: Final Report Submission and Presentation	October 31, 2017