

Community Excellence Awards 2021 Application Form

Please complete and return the application form by May 14, 2021. All questions are required to be answered by typing directly in this form. If you have any questions, contact awards@ubcm.ca.

| SECTION 1: Applicant Information | <i>AP- (For administrative use only)</i> |
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| Local Government or First Nation: Regional District of Central Okanagan Economic Development Commission (RDCO-EDC) | Complete Mailing Address: Regional District of Central Okanagan 1450 K.L.O Road Kelowna B.C, V1W 3Z4 |
| Contact Person: Krista Mallory | Position: Manager of Economic Development Commission |
| Phone: 250-469-6283 | E-mail: kmallory@investkelowna.com |

| SECTION 2: Category. Please select one: |
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| <div style="margin-bottom: 10px;"> <input type="checkbox"/> Excellence in Governance. <i>Governance processes or policies that are outcomes-based and consensus oriented; support and encourage citizen participation in civic decision-making; are efficient, equitable and inclusive, open and transparent; and exemplify best practices in accountability, effectiveness, and long term thinking.</i> </div> <div style="margin-bottom: 10px;"> <input checked="" type="checkbox"/> Excellence in Service Delivery. <i>Projects/programs that provide effective services in a proactive manner, demonstrate benefit to the community, and utilize performance measures, benchmarks and standards to ensure sustainable service delivery.</i> </div> <div style="margin-bottom: 10px;"> <input type="checkbox"/> Excellence in Asset Management. <i>Projects/programs that demonstrate a comprehensive system of asset management policies and practices, meeting and/or exceeding accepted best practices.</i> </div> <div> <input type="checkbox"/> Excellence in Sustainability. <i>Projects/programs that incorporate a long-term sustainability lens by considering cultural, social, economic and environmental issues in planning, policy and practice.</i> </div> |

| SECTION 3: Project/Program Details |
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**Municipal Finance
Authority of BC**



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S Y S T E M S

1. Name of the Project/Program:

Regional District of Central Okanagan Economic Development Commission (COEDC) - Strategic Planning & Community Engagement Process

2. Project/Program Summary. Please provide a summary of your project/program in 150 words or less.

The COEDC provides economic development services to the communities of Lake Country, Kelowna, Westbank First Nation, West Kelowna, Peachland, and East and West Electoral Areas and is accountable to the RDCO Board. In addition to oversight from the Board, the COEDC has a 45-member Advisory Council, made up of industry leaders, community partners, and elected officials, that serves as a conduit of information to/from the Commission.

In an ever pivoting economic climate, the COEDC's strategic plan, *Moving Forward to 2025*, identifies 4 Strategic Pillars. This strategic plan focuses on partnerships to facilitate and encourage the development of a dynamic sustainable economy by supporting existing businesses and encouraging new business investment.

These pillars are:

1. Building Business
2. Growing Sustainability
3. Competing Globally
4. Attracting Top Talent

This strategic plan is the foundation for developing the annual *Operational Plan* which details the COEDC's yearly objectives and performance measures.

3. Demonstrating Excellence. Please describe how your project/program demonstrates excellence in meeting the purposes of local government in BC and provides promising practices for others to follow.

The COEDC is a centralized hub for economic development for the region that works with economic development officers from each of the member communities.

Through this collaboration and partnership, annual measurable objectives are developed that identify priorities and sustainable tactics to move the economy forward long term. The COEDC has implemented a *2021 Operational Plan* that outlines specific and measurable priorities and tactics for the year that meet the strategic long term plans outlined in the "*Moving Forward to 2025 Strategic Plan*".

The *Moving Forward to 2025 Strategic Plan* identifies 5 Sectors in Focus – Agriculture & Viticulture, Aerospace & Advanced Manufacturing, Health, Animation, Film & Digital Media and Information Communications Technology – that are highly significant to the regional economy or have high growth potential.

The development of this multi-faceted approach to measuring deliverables and services, provides an extensive framework which allows the COEDC to provide stakeholders with a succinct, measurable economic plan. The partners supporting the COEDC in the development of their service delivery includes member communities and a number of

industry professionals, community partners including business support organizations, industry associations and post-secondary institutions, and elected officials.

This collaborative focus showcases the innovation of the region, and its ability to adapt and advance the local economy in a cohesive way. While tangible outcomes have traditionally been difficult to measure in economic development functions, the COEDC's well-defined strategic and operational planning process, including measurable objectives, allows stakeholders and the public to better understand and engage with the service.

4. Category Criteria.

A. Please describe how your project/program meets the objectives of the category you have applied under. Refer to Section 3 of the Program & Application Guide.

Using the *Moving Forward to 2025* strategy as a foundation, the COEDC's *2021 Operational Plan* outlines the objectives, challenges, and tactics developed to best capitalize on the region's economic opportunities. These activities are measured and reported quarterly and annually to the Regional District of Central Okanagan Board of Directors which represents all the member communities.

As COVID-19 response and recovery remain at the forefront of economic development in our region, the collaborated efforts of all the partners in building this *2021 Operational Plan* demonstrates the interconnectivity that defines our growing region and provides performance measures that will contribute to a sustainable economic ecosystem.

During September-November of 2020, the COEDC engaged in a full review of the *Moving Forward to 2025* strategy with the RDCO Board and COEDC Advisory Council to determine if the strategy was still sound in the context of Covid-19. Through the process, it was determined that the strategy remains valid, but prioritization between the 4 Strategic Pillars will change throughout the response and recovery process. The Building Business Pillar – focused on supporting regional businesses through the impacts of the pandemic – was universally agreed to be most important and provides a foundation to all other pillars.

B. In many cases projects may meet the criteria of more than one category. If applicable, please describe how your project meets the criteria of one or more other categories.

Excellence in Sustainability - The COEDC has demonstrated operational plans that meet the immediate needs of the region but also ensure long term sustainable operations driving the region's economic growth forward. This long term sustainability is detailed by well-defined objectives, tactics, rational, and measurables which are continuously monitored and reported on a quarterly basis. These objectives are collaborative in nature as they are developed by the member municipalities, industry professionals, community partners, academia, and government officials all focused on economic growth and sustainability in our region.

Excellence in Governance -The COEDC administers economic development on behalf of its member municipalities, these members and industry stakeholders collaborate to shape and define the COEDC's objectives and deliverables. Each municipality or community has a staff member with economic development within their portfolio who relays community's needs through public engagement, its strategic priorities, and resource requests. These action items are communicated to COEDC staff as well as

additional items from the Regional District Board, the COEDC Advisory Council, and industry professionals are used to form the *Operational & Strategic Plan* for the region. Currently, the COEDC has a *2021 Operational Plan* in addition to the *Moving Forward to 2025 Strategic Plan*. These implementation plans are communicated to stakeholders through documentation and quarterly reports.

SECTION 4: Program Criteria

- 5. Leadership.** Describe the extent to which your local government acted as a local or regional leader in the development or implementation of the project/program.

The COEDC serves the entire Central Okanagan region, including Westbank First Nation, and is comprised of a highly effective team of 4 full time staff members and 3 part time contractors. COEDC Staff are diligent in collecting and disseminating economic climate data and remaining up to date on industry trends and undercurrents through extensive research and direct industry and community outreach and are pointed to as a resource for other government services and community partners looking for economic, demographic or community data.

Through consultative planning sessions the COEDC creates innovative programs to meet the ever evolving industry needs of the region and aligning these programs and initiatives with RDCO's strategic priorities and objectives. Through these programs, COEDC conducts face to face (virtual & online due to COVID 19) with over 500 local businesses each year, providing industry intelligence, identifying industry needs, and offering specialized assistance to businesses from COEDC experts and referrals.

While the COEDC is accountable to the RDCO Board, the COEDC Advisory Board acts as a conduit between the COEDC and industry and community leaders, providing an inflow and outflow of information to/from the Commission. It is comprised of 45 members including elected officials, municipal staff, industry leaders, and other key stakeholder's groups providing for a broad cross section of community representation.

The COEDC regularly evaluates its performance against its key performance indicators and pivots priorities and programming based on the needs of the region through the facilitation of advisory board meetings, industry round tables, Business Walks Program and Site Visitations. This ability to shift was evident in the Commission's response to the COVID-19 pandemic and implementation of the Regional Economic Recovery Task Force. This task force was effective in identifying the current state of industries and industry needs through hosting industry roundtables. The COEDC summarized feedback from the round tables into sector specific Industry Indicator Reports providing relevant local, provincial, and federal information through various communication streams, and relaying industry specific needs to various stakeholders and government organizations.

Additionally, the COEDC acted as a leader during the COVID-19 pandemic by bringing together a staff-led group of 14 business support organizations focused on meeting the immediate needs of business. The group, dubbed the Response Action Team, met weekly for 3 months to triage referrals, share resources, identify gaps and provide support and continues to meet monthly.

The COEDC is recognized as a leader in economic development provincially and nationally with many of its programs replicated by other communities. Two examples include the Business Walks Program, first brought to Canada by the COEDC and now implemented in over 75 communities and identified as a best practice by the BC Government, and the CityViz Data Portal, a unique data visualization tool created by a regional company, first implemented by the COEDC and now used in several BC communities.

- 6. Financial management and planning.** Describe the degree to which the project and/or organization has implemented financial best practices that support long-term financial planning, value for money, financial sustainability and/or economic development.

As a small economic department with finite resources, the COEDC recognizes best practices and economies of scale by leveraging both financial and human capital resources through successful federal, provincial and community partnerships. The COEDC has active partnerships with over 45 community organizations working to promote common goals and collaborating to develop regional priorities. These partnerships and collaborative approach ensure no duplication of services occur and contribute to a streamline economic development strategic plan for the region.

- 7. Partnerships and collaboration.** Describe the breadth and depth of community and/or regional partnerships that supported the project/program and the extent to which internal and/or external collaboration was evident.

The COEDC's partnerships with its member municipalities demonstrates unity and collaboration that has contributed to an engaged Strategic Plan for the Central Okanagan. In addition to the collaboration amongst local governments, the Strategic Plan is also molded by industry and stakeholder consultation. This collaborative framework is made up of a 45 member Advisory Council, stakeholder groups, and industry leaders which all contribute to developing objectives and priorities for the region's economic development and sustainability. These objectives are delivered through COEDC programs and their outcomes and key performance indicators are measured and reported back to its collaborative members to evaluate and review the efficacy of the COEDC. These activity reports are provided quarterly to ensure the COEDC programs continue to meet the needs of the region.

There a number of COEDC functions currently in place to work with industry leaders and stakeholders. These programs and initiatives drive the development of the Strategic Plan for the region and contribute to the development of programs to attract and retain business and talent in the Central Okanagan. Below is a brief overview of some of these collaborative initiatives:

1. The Site Visitation program is conducted across the region. The Commission connects with businesses in a large array of sectors including (but not limited too) agriculture & viticulture, digital tech, small business, manufacturing, and aerospace. These connections and comprehensive conversations result in a in depth understanding of industry specific needs that guides COEDC programming and are communicated to other orders of government. The 2021 Site Visit program is strategically focused on two streams: Highly Impacted Sectors and Sectors in Focus. This segmentation ensures that the COEDC follows the Building Business Pillar of the Strategic Plan by meeting the

needs of those sectors most impacted by COVID-19, while not losing sight of long-term opportunities in the strategically identified Sectors in Focus.

2. The COEDC Business Walk Program, started in 2012 was the first business walk in Canada and has been widely adopted by more than 75 Western Canada communities and the BC Ministry of Small Business. The Commission implements this program annually by working with member communities and business community volunteers who go door-to-door connecting with 500+ businesses over the course of a day to take a pulse of the business climate. A brief standardized survey is used to gather businesses input on the current business environment. Data is translated into a final report to be shared with regional partners.

3. In response to the COVID-19 pandemic, the Regional Economic Recovery Task Force was launched on April 14, 2020. It was initiated by the Mayors of Kelowna, West Kelowna, Lake Country and Peachland, as well as the Regional Board Chair and Chief of Westbank First Nation. The task force, with the support of the COEDC, hosted 8 Industry Roundtables to identify specific economic recovery needs and advocacy items. In addition to receiving information from the Economic Response Action Team a working group made up of economic development staff and support organizations in the region was formed to focus on assisting businesses to navigate the impact of COVID-19 on their business. This team is made up of economic development officers, Chambers of Commerce/Boards of Trade, Accelerate Okanagan, Community Futures, Women's Enterprise Centre, Economic Trust of the Southern Interior (ETSI-BC), Thompson Okanagan Tourism Association, and Tourism Kelowna. Findings from the Response Action Team, Industry Roundtables and direct 1:1 industry outreach were used to inform a Regional Advocacy Matrix to support a cohesive voice for the region through the Economic Recovery Task Force.

8. Innovation and promising practices. Describe the degree to which the project/program demonstrated creativity and innovation, and contributed to increased efficiency or effectiveness.

The COEDC's Strategic Plan and Community Engagement Process is dynamic and unique in the economic development environment. The COEDC's plan is developed in alignment with the RDCO's priorities and regional growth strategies framework and through various community & industry consultation outlined below:

- Industry Roundtables - Advisory Council Meetings
- Stakeholder Consultation - Site Visit Industry Consultation
- Business Walk Program - Regional Economic Recovery Task Force

In response to the COVID-19 pandemic the Regional Economic Recovery Task Force was launched as a forum to identify economic recovery needs and advocate for the Central Okanagan as "one voice". In 2020, the Task Force worked with the COEDC Advisory Council to host 8 Virtual Industry Roundtables to identify industry specific needs to develop indicator reports to highlight the state of industry and advocacy items.

Similar to many organizations, due to the COVID-19 pandemic, the COEDC program delivery model had to be re-organized to continue to meet the needs of the stakeholders. The COEDC quickly adapted by switching all in person consultations to virtual while still providing the same level of service (roundtables, consultations, business walks, advisory board meetings, task force meetings etc). For example, the

annual Business Walk Program that reaches over 500 local businesses each year through in person contact was swapped to an on-line survey to ensure safety of the participants while continuing to provide valuable feedback regarding the current state of the business. This shift to virtual and online connectedness allowed the COEDC team to connect with businesses in a safe, effective, and timely manner.

- 9. Public engagement and communications.** Describe the extent to which public engagement was foundational to the success of the project/program, including the use of communication tools such as social media.

The *Moving Forward to 2025 Strategic Plan* was constructed by reflecting on previous RDCO reports (Regional Board Strategic Priorities 2019-2022 and the 2017 Five-year RDCO Regional Growth Strategy Priority Projects Plan) as well as through informed engagement with businesses and community leaders in the region. This collaborative approach included community consultation through workshops, one-on-one site visits, business walks, and online and telephone surveys all of which contributed to a Strategic Development and Engagement Results Report. These two resources were the foundation in identifying opportunities for growth and development in the Central Okanagan providing the framework & vision for the 4 Strategic Pillars identified in the *Moving Forward to 2025 Strategic Plan*.

To view the *2021 Operational Plan* and *Moving Forward to 2025 Strategic Plan* go to: www.investkelowna.com/who-is-the-coedc

- 10. Transferability.** Describe the degree to which the process or outcomes of the project, or other learnings, could be conveyed to other UBCM members.

While economic development is a long term strategy and outcomes can be difficult to measure directly in the short-term, through the Strategic Planning and Community Engagement Process, the COEDC has developed key tracking metrics. This allows the Commission to gauge the effectiveness of programming and provides for flexibility to meet the ever changing needs of the regional economy.

The COEDC is a progressive economic development function as the Central Okanagan is one of the fastest growing regions in Canada. The COEDC has provided consultation in the development of the Province's Performance Measurement Toolkit, created the Business Walks Toolkit promoted by the Ministry of Jobs, Tourism, and Skills Training, and is used as an example to demonstrate economic best practices.

In addition to the COEDC's ever evolving programs and functions, developing a response to the COVID-19 pandemic proved challenging for a plethora of reasons and having developed a strategy in partnership with the community as a whole proved successful in implementing a response plan and recovery initiative. The development of the Regional Economic Recovery Task force and Regional Economic Response Team demonstrated the unity of these member government organizations and industry stakeholders.

Other communities and organizations can emulate the COEDC's success by developing similar consultative processes with their stakeholders and developing key performance indicators that have measurable strategic actions. The COEDC *Operational Plan* and *Strategic Plan "Moving Forward to 2025"* can be used as a resource for communities developing economic development programs. The COEDC's 2021 Priorities and Moving Forward to 2025 documents are publicly available on www.investkelowna.com along

with other valuable resources including economic indicators, statistics and demographic data.

SECTION 5: Additional Information

11. Please share any other information you think may help support your submission.

To further support evidence-based decision making, the COEDC launched a Data Portal in January 2021. Featuring in-depth demographic and economic climate data visualization. The goal of the portal is to support access to information about the people, businesses, and communities of the Central Okanagan. The live portal gathers and visualizes data in real time, it is published from a host of reliable sources including Statistics Canada, BC Statistics, and the Canadian Mortgage and Housing Corporation. The data is easily downloadable, printable, and can be exported as a PDF, Word doc, or Excel file. It is a one stop shop tool that highlights the regions real estate market, population, main industries, household type and income, and much more in an accessible way for regional decision makers and the general public. These quick facts have proven to be a valuable resource not only for COEDC staff but for member municipalities, prospective and current business/ industry professionals, and the public.

The data portal can be found here: data.investkelowna.com

The COEDC continues to research and develop innovative ways to showcase its region and provide easily accessible resources to its partners and the public. The collaborative and communicative approach of the COEDC's Strategic Plan is what makes it successful. The region's ability to cooperate, share, support, and demonstrate initiative is the driving force behind its success in attracting and retaining business. This reciprocity amongst the community and clear measureable objectives outlined in the COEDC's *Operational* and *Strategic Plans* demonstrate the resiliency and strength of the region to rebound after the COVID-19 pandemic.

SECTION 6: Required Attachments

- ☒ Council, Board or Band Council resolution indicating support for the project to be considered for a 2021 Community Excellence Award.
- ☒ Five representative photos of the project. Photos should be submitted as JPEG files at a resolution suitable for display.
- ☐ Optional: Links to any publicly available videos related to the project.

Applications should be submitted as Word or PDF files. Submit applications to Local Government Program Services, Union of BC Municipalities.

E-mail: awards@ubcm.ca

SECTION 7: Signature

Applications are required to be signed by an authorized representative of the applicant.

Name: Corie Griffiths

Title: Director Corporate Services

Signature:



Date: May 20, 2021