



District of Summerland Economic Development Forum

February 15, 2012

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Event Overview

On Wednesday, February 15th 2012, the District of Summerland hosted a 2-hour town hall style Economic Development Forum at the I.O.O.F Hall. The introductory session provided members of the business community, Council, staff, residents, Chamber of Commerce representatives and other participants an opportunity to discuss the area's economic development issues and to explore a more structured, community-based approach to addressing them. The event also provided the District of Summerland an opportunity to introduce the Economic Strategic Action Committee, a broad-based economic development advisory and planning committee to be launched in the near-term. Approximately 61 people attended the event.

The event was facilitated by EcoPlan, a small, Vancouver-based, multi-disciplinary planning firm specializing in strategic and community planning, local economic development, and community engagement. They organized the forum around a four-phase strategic planning approach (pictured) and walked participants through the first two phases (*Where are we now? Where do we want to go?*), going through some of the tasks and questions Summerland's Economic Strategic Action Committee would need to undertake and consider in their work.

Although the relatively short forum went through only two phases of the strategic planning process, it nonetheless generated considerable discussion and provided the District some direction on moving forward with economic development planning. In particular, the Forum helped the District answer three key questions: *Does economic development in the district need help? Is there a need for an organized group to lead the process? Which group should lead the process?* Here's how participants answered using a remote voting system used by EcoPlan:



- **THE DISTRICT NEEDS HELP WITH ECONOMIC DEVELOPMENT:** 98% of participants felt that economic development in Summerland needed help.
- **SUPPORT FOR ECONOMIC DEVELOPMENT SHOULD BE ORGANISED:** 84% of participants either agreed or strongly agreed that economic development in Summerland would benefit from *organized* support.
- **A NEW COMMITTEE SHOULD LEAD THE PROCESS:** this topic prompted more varied responses, with 46% in favour of a new committee/ task force/ organization, 22% choosing the Chamber of Commerce, and 15% and 12% supporting a new staff position and the District of Summerland, respectively.

Participant Feedback

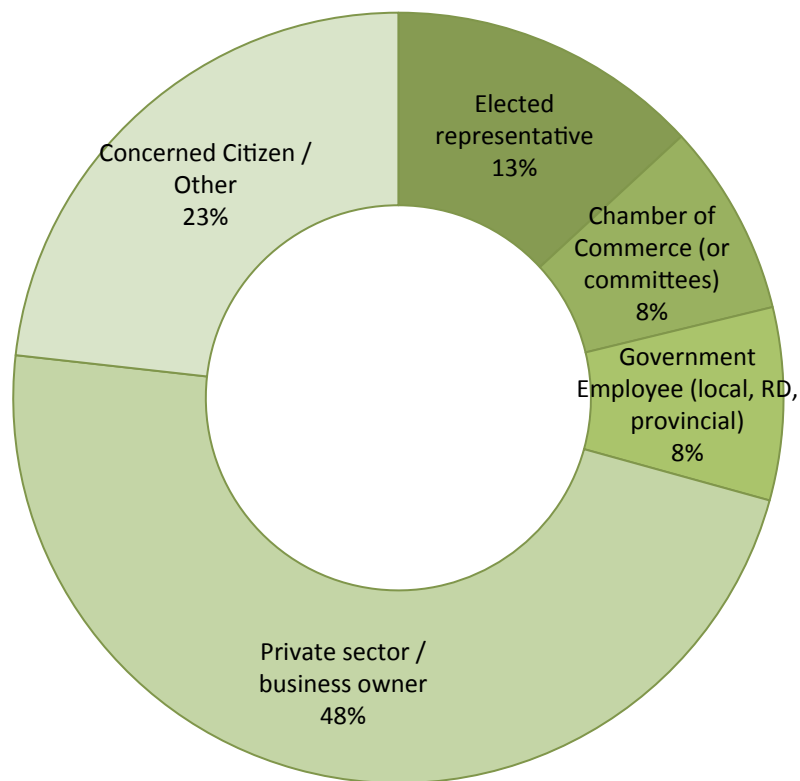
Forum facilitators used several methods of gathering information at the event, including plenary discussions, large group activities, and small-group activities. Forum facilitators also used audience response system (ARS) keypads that permitted real-time survey questions (ranking, true-false, multiple choice, etc.), including questions that participants developed themselves.

This section provides a summary of the forum, results from the ARS questions and a transcription of participant feedback captured on flip charts and provided by participants on sticky notes.

Introduction

To learn a little about people at the forum, the following questions were asked using audience keypads.

Question 1: Who are you?

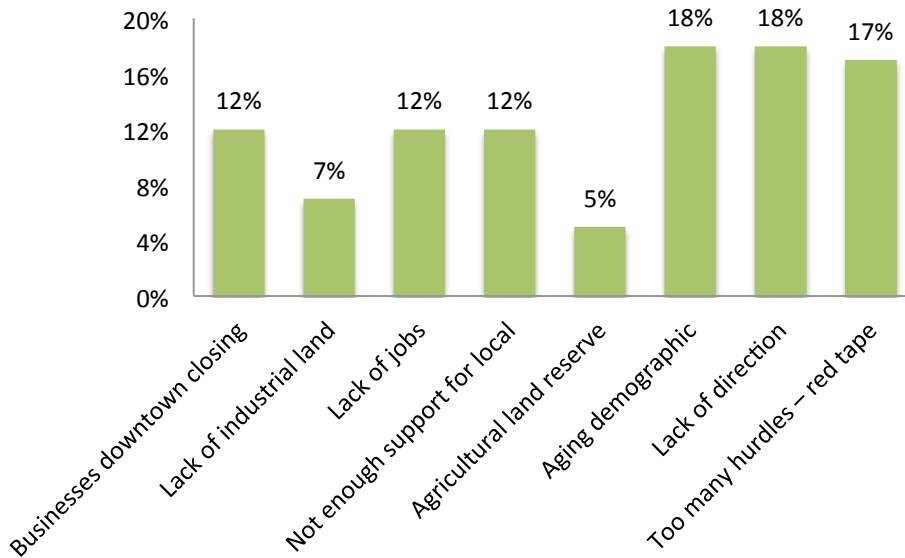


Question 2: Which of these statements best applies to you?

The thought of economic development excites me. Love it!	5%
I enjoy it. Sure, it can be challenging sometimes, but done right it helps my community.	47%
I know what to do. There is just too much political interference!	14%
I wish I had clear direction -- from the community, politically -- so we could all get on the same page.	22%
I am new to economic development. I want to know how to do it better.	8%
It is best to just hire outside experts (consultants/business schools/NGOs).	3%

Question 3: What are Summerland's top economic development issues?

The following issues were brainstormed by participants, after which they were asked to use their ARS units to vote on which one they felt was the most important.



No single issue was a primary concern for those involved, with six of the eight issues garnering between 12% and 18% support. The agricultural land reserve was seen as both a constraint on land development, particularly light industrial, but also an opportunity.



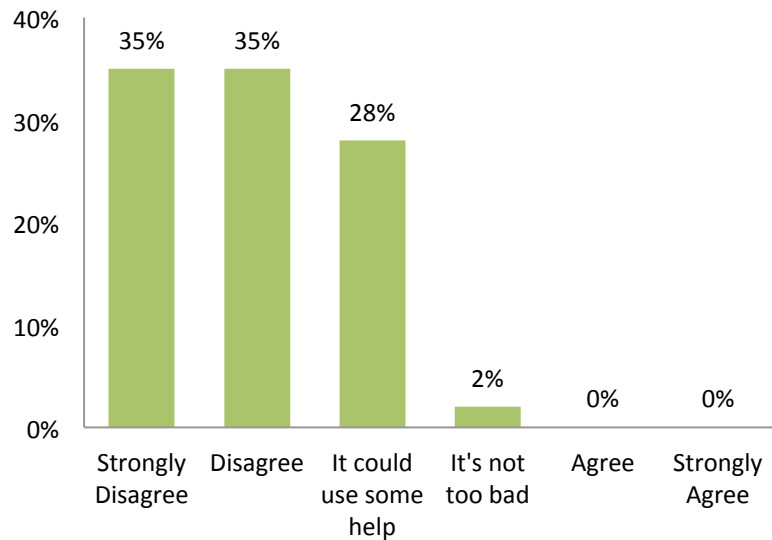
Phase 1: Where are we now?

This section of the presentation explored three tasks – getting started, stakeholders & participants, and situation assessment. Discussions and questions centred on why economic development is a topic of interest, who should be involved in the process, and what the current local economic context in Summerland is.

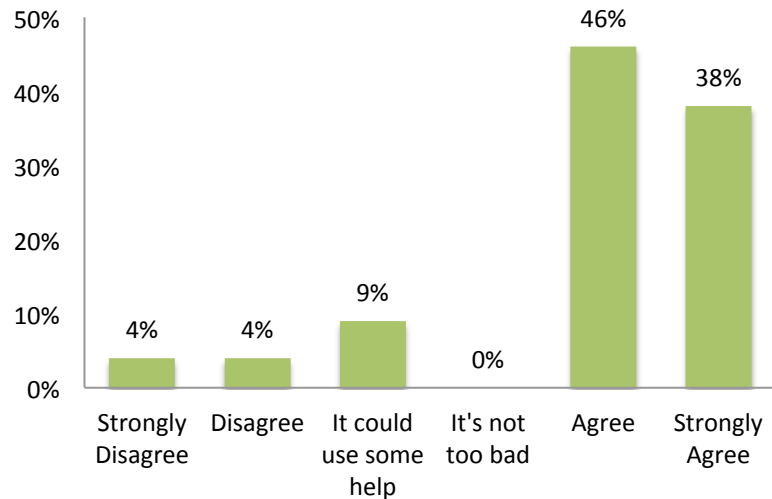
Question 4: Economic development in Summerland – what is it (choose three)?

Business & investment attraction	25%
Clustering & value-adding growth (e.g., agriculture/viticulture research/technology)	11%
Marketing, branding and promotion	7%
Quality of life (e.g., amenity migration, “creative class,” retirement, etc.)	5%
Enabling environment – policies and practice	15%
A participatory process with locally defined objectives	20%
Business retention and expansion	16%

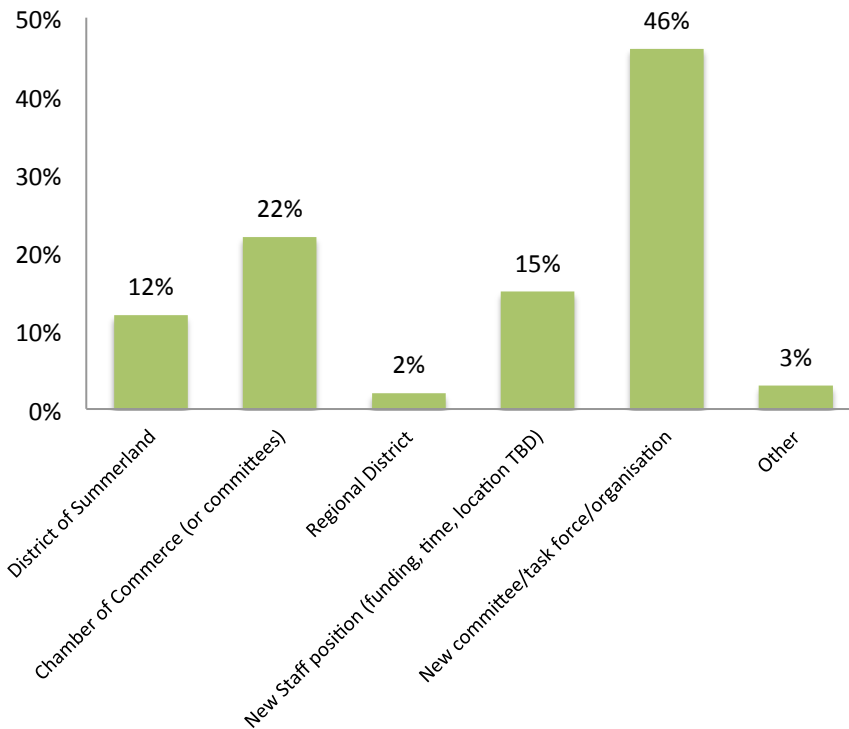
Question 5: Do you agree with this statement - Economic development in Summerland is doing great.



Question 6: Do you agree with this statement - Summerland would benefit from organized economic development support.

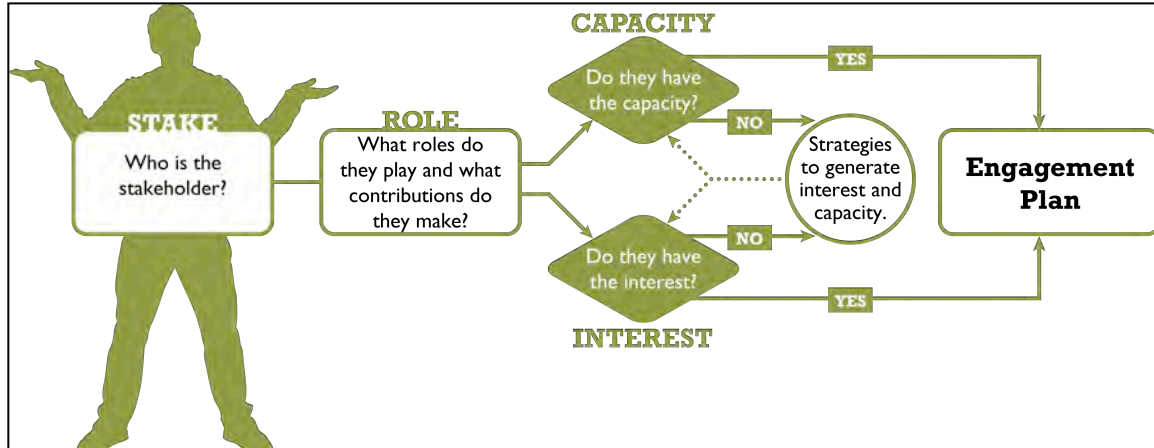


Question 7: If Summerland were to more actively pursue economic development, who should lead the effort?



Next, the identity and role of stakeholders was explored to better understand the process of community engagement in strategic economic development planning.

Figure: Who is the stakeholder – and how to involve them?

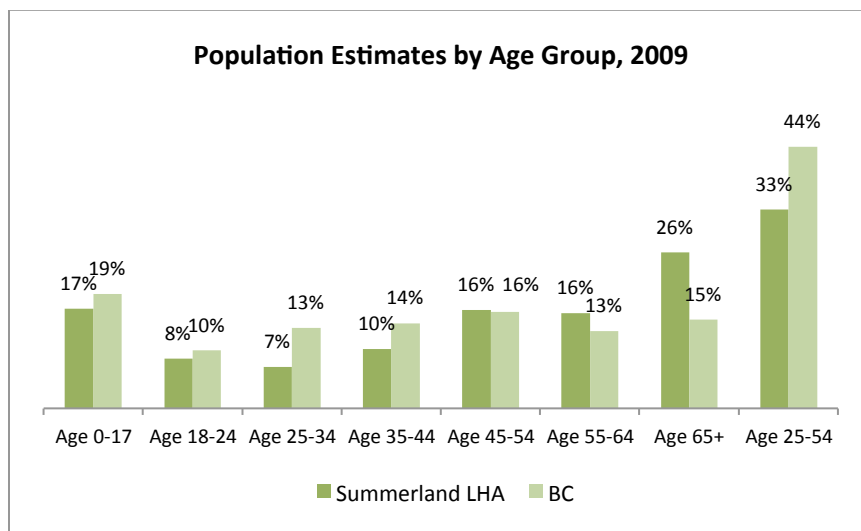


Participants identified the following stakeholders to be involved in economic development planning in Summerland:

- Business owners
- Tax payers
- Residents
- Seniors
- Sectors
- Youth
- All demographics
- First Nations
- School boards
- Financial institutions
- Local government
- Farmers
- Arts community
- Hospitality and tourism sector

Next, participants tested their knowledge of the economic development situation in Summerland (based on 2006 Census data). The following facts were learned about the area, some of which were a surprise to the audience:

- Agriculture, as opposed to residential or commercial retail land uses, often generates more tax revenue than it demands in public services (55% of participants thought it would be commercial retail).
 - Rationale: Because cows don't go to school. Commercial retail is sometimes correct sometimes, but it is highly variable.
- Mixed-use infill developments generate more tax revenue per acre than agriculture, residential, or highway commercial (36% of participants got this question right).
 - Rationale: A recent study in Florida (where agriculture is a valuable and major industry) found the following: big box commercial - US \$8,000 per acre; high-end mall - US \$22,000 per acre; mid-rise mixed use building - \$500,000 per acre; high-rise mixed use building - US \$1.2 million per acre
- Retail trade is Summerland's second largest industry by labour force (Only 9% got this question correct).
 - According to the 2006 Census, retail trade was about 10.5% in Summerland vs. 11% provincially. Public administration was 8% vs. 4.5% provincially; manufacturing was 10% vs. about 8% provincially; and, health care and social service was 12% vs. about 10% provincially.
- Trade, transport and equipment is Summerland's second largest occupational category. (Only 12% of participants got this question correct).
 - According to the 2006 Census trade, transport and equipment was about 17% vs. 15% provincially. Sales and service was 22% vs. 25% provincially; business, finance and administration was 15% vs. 17% provincially; and, health occupations were 5% vs. 7% provincially.
- 26% of Summerland's population is over the age of 65 (46% of participants got this question correct).



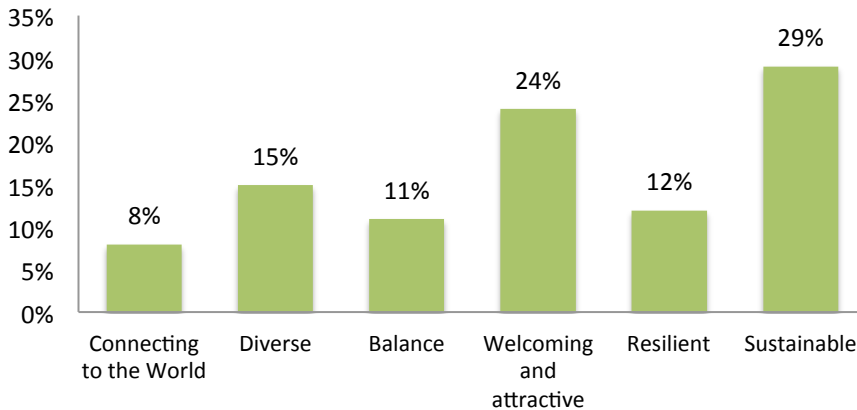


Phase 2: Where are we going?

This section of the presentation explored two tasks – visioning and issues & objectives. Discussions and questions centred on formulating a vision for the District of Summerland, and identifying the objectives that could help attain that vision.

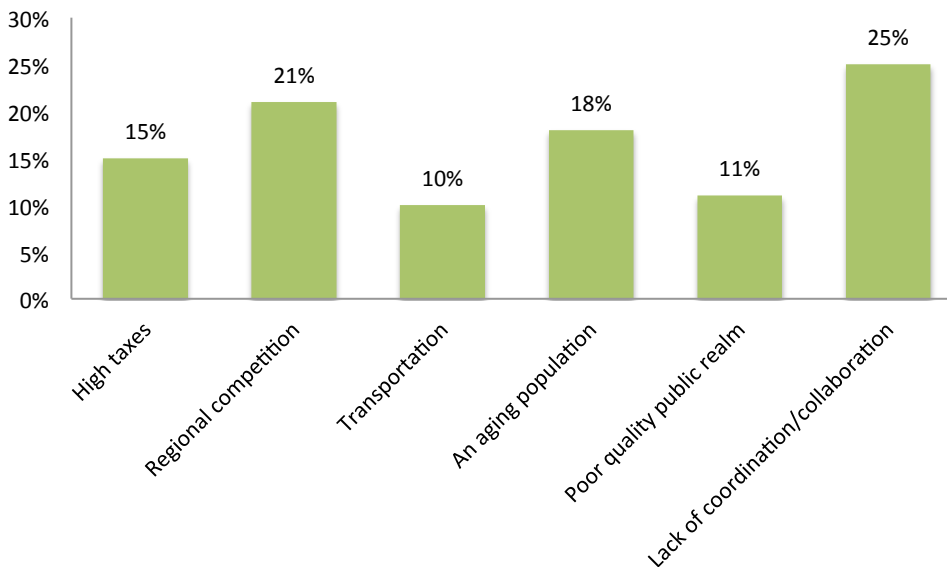
Question 8: What statement or word(s) best reflects a vision for Summerland Economic Development?

The following “vision” word(s) or phrases were taken from existing economic development documents, both from the District of Summerland and the Chamber of Commerce. Participants were asked to select their top-three using their ARS units.



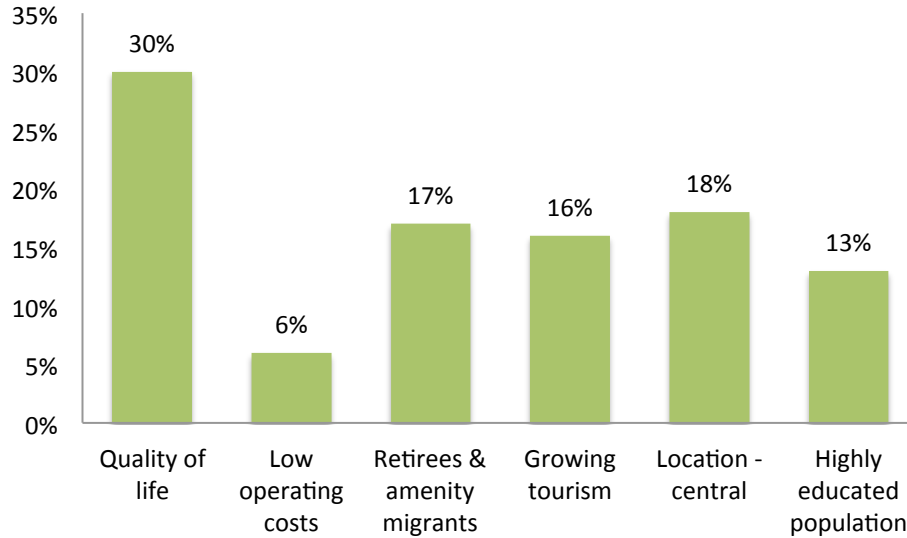
Question 9: What are the biggest challenges to operating a business in Summerland?

Participants brainstormed the top challenges, or issues, to operating a business in Summerland, which were then voted on (top three) using the ARS units.



Question 10: What are the biggest opportunities for business in Summerland?

Participants brainstormed the top opportunities to operating a business in Summerland, which were then voted on (top three) using the ARS units.



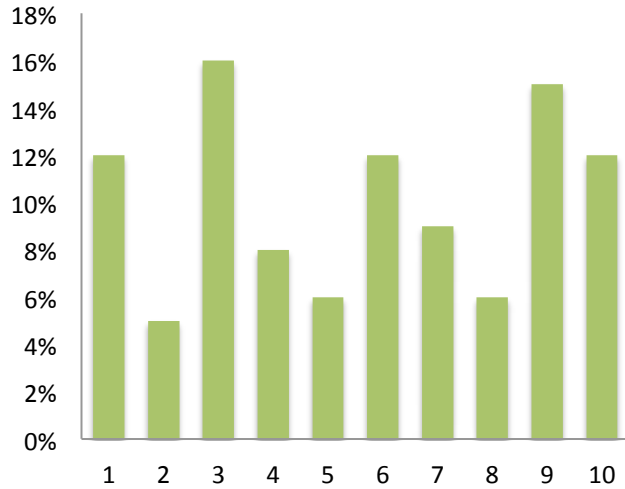
Small table groups reviewed these issues and opportunities, converted them into objectives, which they presented to the large group. The following objectives were identified:

- Encourage home-based businesses
- Support value-added agriculture
- Fill empty buildings/spaces
- Support light industrial development
- Reach economic development consensus with community
- Diversify housing
- Revitalize existing businesses
- Increase the number of jobs
- Attract the “creative class”
- Increase the tax base
- Support local businesses
- Support business retention
- Support KVSR Society
- Provide incentives to shop local
- Increase wealth coming into the community
- Get rid of hurdles –red tape
- Create affordable housing/land
- Focus more on service business, rather than retail
- Increase the number of people living downtown and activity there
- Support innovation
- Encourage development of a unique community/ become a destination
- Develop tourism sector
- Support local businesses
- Support artistic development/ a vibrant arts community
- Support flexibility and balance between residential and business
- Be a beautiful and welcoming town
- Promote and support organic food production/local agriculture
- Increase affordable rental spaces for small-business

Question 11: Where should Summerland focus to have the biggest positive impact?

Each table, or work group, provided their 'top' objective to be voted on by the whole group. The audience was presented with the objectives and asked, "Where should Summerland focus to have the biggest positive impact?" They chose their top three objectives in order of priority.

1. Encourage small home base business
2. Fill empty buildings with businesses
3. Support light industrial development
4. Revitalize existing businesses
5. Promote job creation
6. Attract creative types
7. Grow tax base
8. Build community support/ consensus for local economic development
9. Create a unique community
10. Retain existing businesses





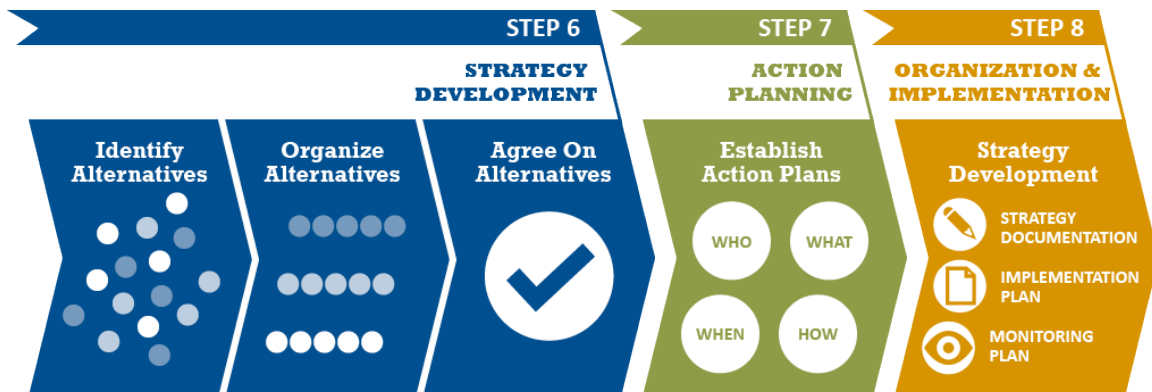
Phase 3: How do we get there?

Participants did not have time to get into the third phase of the planning wheel. They did, however, brainstorm the following actions that could be pursued to realize the objective(s) they felt were most important as individual participants.

- Step up hours of operation for business
- Open libraries and pools for longer hours
- Develop cycle tourism (e.g., Kettle Valley rail-trail, bike-rental store in summer, connect wineries with cycle paths)
- Explore viability of slaughterhouse to support small, local farmers
- Use more colours in town; get away from cream and brown colour theme.
- Miniature trains rides for kids
- Provide incentives for local community to use local businesses
- For Downtown: murals, flowers, trees, interesting store windows, beautify buildings with “early Canadiana” theme, use heritage and arts to attract tourists and business
- Address restrictive taxes on home based-business
- Form a committee
- Big winter market for home based-businesses
- Establish an economic plan

Unfortunately, as time was limited, participants did not get the opportunity to walk through the development, assessment, and selection of actions (or alternatives). In a fuller planning process, developing a strategy would involve the steps shown below.

Figure: Phase Tasks - Where do we want to go?



Next Steps and Recommendations

The forum was a well-attended, positive experience that generated a considerable amount of feedback in a short amount of time. As a kickoff point, it paves the way for future work and provides a clear mandate for Council to continue in establishing the Economic Strategic Action Committee.

Council has already begun the next steps of the process. They are currently taking information from interested residents and organization representatives who would like to participate in the new committee. In fact, Council received the first applications for the committee at the meeting.

Once the Economic Strategic Action Committee members are selected, it is important that Terms of Reference (ToR) is generated that clearly outlines the committee's responsibilities, objectives and the scope of their work. It could also outline or establish the planning principles to guide their work (e.g., participatory, community-based, strategic transparent, etc.) and direct the group to use more structured decision-making tools to support their work.

Several participants urged that the next steps (i.e., confirming issues and objectives, identifying strategies and actions, moving actions forward) be an inclusive process coordinated by the new Economic Development Strategic Action Committee rather than all future recommendations coming solely from the Action Committee. Participants also expressed an interest in using a similar four-phase strategic planning process to help guide the Economic Strategic Action Committee's work as was demonstrated at the Forum. There was some interest in bringing EcoPlan back in for a longer (½-day, all day), strategic planning session with the Economic Strategic Action Committee to help them organize their work going forward.

Finally, many participants requested that the results of the Economic Development Forum (i.e., this report) be posted on the District's website for participants and other interested parties to access.



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