

UNIVERSITY OF CALGARY

**AN ACCOUNT AND TEST OF EFFECTIVENESS OF STRATEGIC PLANNING IN THE
CONTEXT OF COMMUNITY ECONOMIC DEVELOPMENT**

by
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A Master's Degree Project
submitted to The Faculty of Environmental Design
in partial fulfilment of the requirements for the degree of

Master of Environmental Design
(Urban and Regional Planning)

FACULTY OF ENVIRONMENTAL DESIGN
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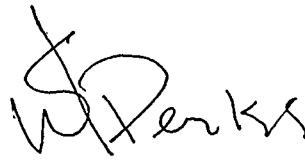
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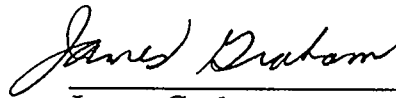
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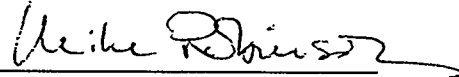
The undersigned certify that they have read, and recommend to the Faculty of Environmental Design for acceptance, a Master's Degree Project entitled "AN ACCOUNT AND TEST OF EFFECTIVENESS OF STRATEGIC PLANNING IN THE CONTEXT OF COMMUNITY ECONOMIC DEVELOPMENT" submitted by Chris Fields in partial fulfillment of the requirements for the degree of Master of Environmental Design.



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ABSTRACT

AN ACCOUNT AND TEST OF EFFECTIVENESS OF STRATEGIC PLANNING IN THE CONTEXT OF COMMUNITY ECONOMIC DEVELOPMENT

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June 29, 1994

Prepared in partial fulfilment of the requirements of the M.E.Des. degree in the
Faculty of Environmental Design,
University of Calgary

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This Master's Degree Project applies the concepts of Strategic Planning and Community Economic Development to an economic development strategy in a project-specific context -- Cold Lake, Alberta. At the time of the Study in 1992, the proactive search for the right forms of community development was constrained by efforts to accommodate a high growth rate. The fractured and undefined approach to community economic development was a genesis of longstanding organizational attitudes and priorities, and unique social and economic circumstances.

The Perks/Kawun/Macdonald strategic model was applied to the planning operation; this embraced four workshops, a SWOT analysis, production of a vision statement, and development of a mission, strategies, and actions. Project-specific adaptations made to the strategic model propose that communities formulate goals and actions based on identified issues that are critical to the community's future, and that they use prophetic-type vision statements as one means to engender leadership, community commitment, and improved organizational capacities.

An account of the design and execution of the Cold Lake project forms the major part of the MDP. Second, an opinion survey of key participants highlights a critical assessment of the effectiveness of the strategy process conducted in Cold Lake. The Study concludes that the application of strategic planning to community economic development renders good value for the community if careful consideration is given to the project-specific context.

c Chris Fields

Key Words: Strategic Planning, Community Economic Development, Economic Development Strategy, Perks/Kawun/Macdonald Strategic Model, Project-Specific Context

TABLE OF CONTENTS

TABLE OF CONTENTS

i

INTRODUCTION

Project Background and Context	1
Project Goals and Objectives	3
Methodology, and Organization of the Study Document	5

Chapter 1 - STRATEGIC PLANNING NEEDS, PRINCIPLES, AND CONSTITUENT ELEMENTS

1.1	Strategic Planning Foundations	8
1.2	The Operationalizing of Strategic Planning	10
1.3	Applying Strategic Planning to Economic Development	15
1.4	Designing a Strategic Planning Process for Cold Lake	17

Chapter 2 - ISSUES, TRENDS, AND CAPACITIES IN COLD LAKE - THE SITUATIONAL CONTEXT

2.1	Historical Overview and Present Context	22
2.2	Analysis of Community Capacities	26
2.3	Situational Context - A Summary	30

Chapter 3 - THE COLD LAKE PROJECT: AN ACCOUNT OF THE STRATEGIC PLANNING PROCESS

3.1	Workshop One -- A Community Reconnaissance	32
3.2	Situational Analysis Research - July-October, 1992	34
3.3	Workshop Two -- Situational Analysis and Critical Issues	37
3.4	Strategic Direction -- Exploring Possible Futures	43
3.5	Workshop Three -- Visioning the Future	48
3.6	Workshop Four -- Goals, Strategies, and Actions	52
3.7	The Mission Statement	54
3.8	The Final Presentation to Council	56

i

Chapter 4 -	POST-PROJECT EVALUATION BY THE PARTICIPANTS	
4.1	An Opinion Survey of the Cold Lake Economic Development Strategy and Strategic Planning	63
Chapter 5 -	CRITICAL EVALUATION AND REFLECTIONS ON THE COLD LAKE STRATEGY PROCESS	
5.1	Implementation	78
5.2	Results Achieved to Date	84
5.3	Conclusions	86
APPENDICES		
A1	Workshop One - Strengths and Weaknesses, Opportunities and Threats	91
A2	Workshop Two Briefing Notes	99
B	Community, Tourism, Youth, and Workshop Participant Opinion Surveys	112
C	The Final Report	133
REFERENCES		134
BIBLIOGRAPHY		135

INTRODUCTION

*Vision without action is dreaming
Action without vision is passing the time
Vision with action can change the world*

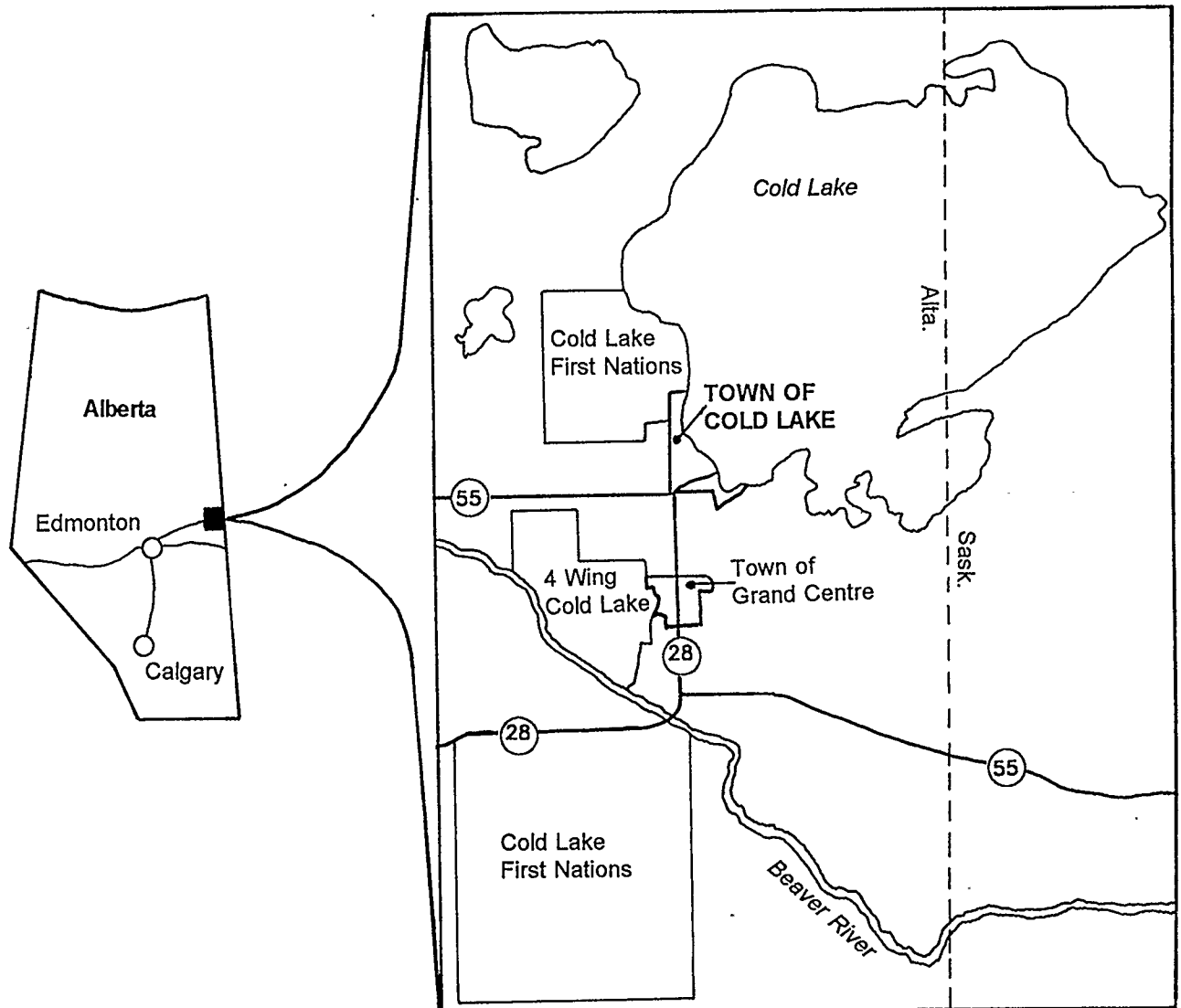
Joel Arthur Baker

The case study for this Master's Defense Project (MDP) is Cold Lake, Alberta, located on the south shore of Cold Lake in northeastern Alberta. A community highly dependent on the defense and oil industries for employment, Cold Lake experienced rapid growth through the 1980's and into the early 1990's. Rapid residential growth has not been paralleled by commercial growth, which gravitates to the Town of Grand Centre, five kilometres to the south. A significant proportion of the commercial area in Cold Lake remains vacant, including much of the lakeshore. By the early 1990's Cold Lake's political representatives were convinced of a need for commercial and tourism development in the community. Of critical concern to Cold Lake's elected officials was the present and future tax burden placed on a proportionately high residential tax base if the commercial tax base could not be improved.

Project Background and Context

The Town of Cold Lake has a population of 4021 and is situated on 300 km east north-east of Edmonton. The town sits on the south shore of Cold Lake, one of Alberta's largest accessible lakes (480 sq km) (*Figure 1*). The Cold Lake area exhibits significant potential for tourism development, and for business and community growth. The community has a seventy-year history of fishing-dependent tourism, stocks of which have been depleted significantly through the years and cannot be relied upon to sustain the tourism industry. The natural beauty of the area, and completion of a 250 berth marina in 1990 led many local decision makers to believe that tourism could be revitalized to become a mainstay of the local economy. There was a desire for commercial growth in addition to tourism revitalization; but there was no definition of the types of tourism and commercial businesses that could or would satisfy that desire.

Figure 1- Cold Lake Map



In 1992, the existing approach to community economic development was fractured and undefined; and it was complicated by the dominant commercial presence of Grand Centre. While persons sitting on volunteer committees and selected councillors desired commercial growth, Grand Centre's commercial presence had instilled a sense of fatalism about the potential for commercial growth; others stated that new business was not economically viable in Cold Lake.

Five months prior to initiation of the Economic Development Strategy project in June, 1992, a downtown revitalization committee and a tourism committee joined forces to become the Cold

Lake Economic Development Committee (EDC). The EDC was persuaded by a tourism consultant and other regional agencies to obtain funding to undertake an Economic Development Strategy. In June, 1992 the Town secured the services of a Project Coordinator (the author) for a six month term to facilitate a planning program leading to an Economic Development Strategy.

Project Goals and Objectives

As stated in the Terms of Reference for the project, the project goals were to support the retention and expansion of existing businesses, attract new business investment, and retain and attract new residents. Project outcomes were to be:

- A Frame a comprehensive strategy for economic development;
- B Encourage public input and the coordination of relevant groups and organizations concerned with economic development;
- C Provide a direction setting exercise which would offer the EDC insights into community desires, expectations, and perceived constraints affecting economic development.

To accomplish these goals, the Project Coordinator designed a strategic planning process which would embrace a Situational Analysis, and facilitation of four workshops including visioning and goal, strategy and action plan articulation. A public sector planning model pioneered by Perks and Kawun (1986) and later further refined by Perks and Macdonald (1990) was adapted based on the plan's situational context -- viz. a focus on internal capacity-building.

An account of the project forms the major part of this MDP. The study aims to assess the applicability and effectiveness of strategic planning in a public sector environment. In a second part, effectiveness is measured from the perspective of both the project facilitator and the project participants; but it emphasizes as well the effectiveness of strategic planning in meeting client group and stakeholder needs and expectations, and achieving results.

The object of the MDP is not to break new theoretical ground, but rather: first, to apply theory to the situational context of a real-life project, and second, to determine the effectiveness of the process in light of a project-specific context. In other words, the purpose has not been to evaluate the construct and the contents of the Final Report produced for the client group; we evaluate from

the perspective of those who must implement and take ownership of the plan -- workshop participants, key leaders, and community residents -- the applicability and value of strategic planning to local development planning in rural communities.

More specifically, the objectives of the MDP are:

1. To give an account of the design and execution of the Cold Lake project:
 - a) to engage in a strategic planning process in a real small town project utilizing strategic planning theories and methods;
 - b) to document the project from start to finish, thereby adding to knowledge of strategic planning in the context of community development;
 - c) to develop and outline techniques or a process for conducting an Economic Development Strategy at the community level, including survey designs, interactive planning, and community-participant workshops;
2. To perform an assessment at the completion of the project, including an opinion survey of key participants

This Study should be of interest to practitioners of community-level or public sector strategic planning, for several reasons:

-Though strategic planning has been espoused as a beneficial planning activity for many years now, there is little literature that attempts to determine just how effective the results are, and whether the results are the anticipated benefits that proponents of strategic planning propound. This MDP measures effectiveness from the perspective of the client group, and other participants.

-Strategic planning in the public sector can be distinguished from planning in the private sector. The primary distinction is the public sector's highly-charged political decision making environment; innovative adaptations of the private sector (or corporate) model are required to accommodate this distinction. Since a substantial proportion of the strategic planning literature focuses on the private sector model(s), this Study should add to an understanding of strategic planning in a public sector environment.

-Many economic development strategies limit themselves to finding new businesses, or retaining existing business. The scope of the Cold Lake Economic Development

Strategy reaches beyond this. It incorporates an array of activities that reflect community economic development principles. Though the ultimate effectiveness of this may not be known for some time, some insights can be gained into the anticipated immediate effects and whether this "comprehensiveness" is advantageous over the more traditional scope of an economic development strategy.

-Particular modifications made to the Perks/Kawun/Macdonald model (Perks et al, 1986, 1990) , including incorporation of "critical issues" and the process devised with respect to the writing and presentation of a vision statement were intended to encourage organizational capacity-building; to make the process easier to understand and participate in for participants by stimulating interest, excitement, and discussion; and to generate commitment to a unified future direction for the community. The effectiveness of these elements of the process are recorded from the participant's viewpoint.

-The project maintained what could be called a "populist perspective"; this, in the belief that the building of community empowerment and self-dependency are means by which communities -- especially rural, remote communities -- can determine their own destiny, not have destiny determined externally. The project also illustrates a process that can be broadened to a wider context of community decision making.

Methodology, and Organization of the Study Document

Strategic planning in the context of community economic development was applied as a theoretical and practical organizing principle in the planning process. A literature review of strategic planning, community economic development and their practical applications had been conducted in the author's earlier, graduate course work. Further practical experience with strategic planning and the Perks/Kawun/Macdonald model of strategy facilitation was acquired in 1991 while employed as a Research Assistant for the Centre for Livable Communities, University of Calgary; the author aided in facilitation of a development strategy for the Town of Stettler. The Perks/Kawun/Macdonald community-based, participatory model of public sector strategic planning was adopted as an organizing structure to define the contents of the Cold Lake Economic Development Strategy. This model incorporates well-established strategic planning activities: an assessment of the internal and external environments; a Situational Analysis; visioning; goal,

strategy and action articulation; and implementation and monitoring; it insists, however, on a context-specific and project-genesis specific adaptation, place by place.

The decision making environment within which strategic planning and the Cold Lake Strategy would operate suggested a priority need for the building of client group and community capacity to set direction, achieve unity in vision, identify resources, improve and coordinate decision making, and identify relationships with the external environment. As a result, the strategic planning model applied to the crafting of a strategy closely follows principles of the Perks and Kawun participatory model. Given the project-specific, initial context, the strategic planning process placed emphasis on assessment, understanding and resolving of issues within the internal environment. There are, therefore, three significant adaptations to the Perks/Kawun/Macdonald model that owe themselves to the specific Cold Lake context:

- Use of "critical issues" identification, and resolution of them, to give greater continuity to the process
- Adaptation of the externally-driven "Scenario" stage of the process to place greater emphasis on an internally-driven "Vision Statement" exercise
- A uniquely-conceived presentation of the Vision Statement, entitled "Footsteps of the Future"

The Economic Development Committee, and others invited to sit in on the four-session strategic planning workshop process accomplished three activities over the six month time span:

- An analysis of "where we are now as a community" and identification of the critical issues that must be resolved to achieve successful community development (a Situational Analysis);
- Visioning about "where we want to be in future as a community"; and
- Identification of further specifics about "how we get there" -- to an identified future image (i.e. goals, strategies and actions that resolve generated critical issues).

The MDP is organized as follows:

Chapter One discusses the need for strategic planning, its principles, and its constituent elements. Discussion of the adaptation of the Perks/Kawun Macdonald model to the Cold Lake situation concludes the Chapter. **Chapter Two** further discusses the nature of the model's adaptations in light of the Project Coordinator's conclusions about the impact of Cold Lake's significant issues, trends, and organizational capacities.

Chapter Three provides an account of the process from start to finish, and is highlighted by an account of the Perks/Kawun/Macdonald model's adaptations: the use of issues and critical issues; and the use of vision statements rather than scenarios in the visioning process. Appendix A provides examples of complete Briefing Notes completed for Workshops One and Two. Youth, community, and tourism survey results, which were incorporated into the Workshop Two Briefing Notes, are enclosed in Appendix B. Appendix C summarizes the content of the Final Report.

An opinion survey issued to workshop participants and community stakeholders after completion of the project is the focus of **Chapter Four**, which measures the effectiveness of the strategy process conducted in Cold Lake. A tabulated copy of the opinion survey is enclosed in Appendix B. **Chapter Five** revisits the project and survey results to draw conclusions about the future of strategic planning in Cold Lake. The author concludes the Chapter with an assessment of whether the Perks/Kawun/Macdonald model and its adaptations were effective at meeting client group and community needs and achieving results.

Chapter 1

STRATEGIC PLANNING: NEEDS, PRINCIPLES, AND CONSTITUENT ELEMENTS

*Our eyes have not seen, our ears heard, or our minds imagined what we can build.
Where there is no vision the people perish.*

The Bible

In the course of events preceding application to the provincial government for funding, Cold Lake EDC members were made aware that strategic planning could be a beneficial means for setting and carrying out an economic development direction. But questions remained: Why was strategic planning beneficial? How is it done? What results are obtained? This Chapter discusses background on the foundations and constituent elements of strategic planning; they were applied to consideration of an approach for the conducting of a strategy process in Cold Lake. The Chapter discussion is framed relative to communities; it serves as a basic source of reference in assessing the effectiveness of strategic planning applied to community economic development. The Chapter concludes with a synopsis of the Perks/Kawun/Macdonald strategic model (Perks et al, 1986, 1990), and the adaptations made to the model for the Cold Lake strategy process. The reasoning behind the adaptations is further developed in Chapter 2.

1.1 STRATEGIC PLANNING (SP) FOUNDATIONS

1.1.1 The Ethos of SP

John A. Macdonald. Henry Ford. Thomas Edison. Alexander Graham Bell. Winston Churchill. Walt Disney. Mahatma Ghandi. Napoleon. John F. Kennedy. Martin Luther King Jr. These are some of the names provided in response to a question posed to business school participants in a strategic planning seminar conducted by the author in August, 1993 which began by asking for names of significant persons throughout history notable for their contributions. The essence of strategic planning was represented in all of the names provided. Each of them possessed one unique quality fundamental to strategic planning -- vision. Moreover, each possessed not only a vision of something different than the present but a passion to achieve visioned change. Third, the innovators and the inventors, those who achieve change and realize success, all have a picture of a different future combined with a desire that inspires others to unify and commit to a course of action.

Strategic thinking has inspired change throughout the existence of mankind, through culture, invention, politics, and writing. Individual and organizational visions have been the generators of recorded history's greatest achievements, innovations, works of writing and art, and cultures. Vision and strategic planning have also attended much of history's bleakest events. In short, successful strategic planning questions the present, dreams of a different future, and frequently inspires revolutionary change. Strategic planning, as articulated in a model or an organizational process, provides a tool to challenge the user to challenge routine.

From another perspective, SP "asks" that we create our own, future history. The notion that the future is selectable rather than determined externally provides the strategic planning user with the flexibility and adaptability to effectively manage change. This ethos would be the foundation of the strategic planning conducted in Cold Lake.

1.1.2 A Need for SP

The pace of social, political, economic, and technological change in the last three decades has necessitated the re-visiting of decision making and behavioral models. Traditional planning models or paradigms have increasingly been perceived as inadequate for riding the waves of turbulent or structural change, or to even foresee them. (United Way, 1985, Bryson and Einsweiler, 1988, Lyons in Albert, 1983) Traditional planning, which has often involved only a hint of planning (crisis management, "muddling through") or which merely project the past into the future (long range planning, comprehensive planning), has in many contexts been replaced by SP. Strategic planning has been seen as a means of resolving the perceived inadequacies of traditional forms of decision making.

"Strategic planning represents the latest step in the evolutionary process of organizations or communities attempting to find a better way to manage themselves in times of turbulent environmental change." (*United Way, Booklet 1, 1985*)

1.1.3 Strategic Planning Applied to The Public and Private Sectors

Seen as an advantageous activity by many in the private sector over the last thirty years, public sector adoption of formalized strategic planning is a more recent phenomenon. Strategic planning

is increasingly filtering into the planning activities of public sector organizations. Steiner (1979) draws five key distinctions between planning in the private versus not-for-profit sectors:

1. Politics dominate the not-for-profit sector;
2. Pluralism in the not-for-profit sector, is equated to making decisions with a board of directors made up of employees, customers, suppliers, and competitors;
3. Differences in missions, purposes, and objectives. These are expressed in broad terms in the not-for profit sector, very specific terms in the for-profit sector. However, planning is usually easier when objectives are specific;
4. Evaluating alternatives and decisions in the process. In the not-for-profit sector there are no quantitative measures for determining the rationality of decisions (eg. ROI, market share, profits, sales margin). The criteria often used are instead public interest, public opinion, political efficiency, and cost benefit analysis. The "public interest" is a conceptual but not operational criterion, but generally consists of phenomenon of high concern to society (peace, prosperity, quality of life, full employment) and;
5. Implementation. It is often more difficult in the not-for-profit sector because the chain of command is not as clear.

The political nature of public sector strategic planning focusses SP emphasis on the establishment of partnerships and the achievement of collective action. This inward focus is therefore naturally apt to force public sector SP to expend considerable energies on the internal environment, rather than the external environment. Developing and implementing strategies in the public sector requires the building of commitments and partnerships among key stakeholders to ensure collective organizational responses (*Perks and Kawun, 1986*).

1.2 THE OPERATIONALIZING OF STRATEGIC PLANNING

1.2.1 The Elements of Strategic Planning

While numerous definitions of SP have been written, all definitions of SP have at their core a common set of elements. At least five common elements can be identified (Lakeland Community Futures Strategic Plan, 1992):

- Strategy is continuous
- Strategy examines the whole and not just the parts
- Strategy involves value judgements and is geared towards the assessment of change and

- the wilful generation of change
- Strategy is future oriented
- Strategy entails the notion of mobilizing resources

The merging of these five elements conveys a sense that SP is a means to make better current decisions by creating the organizational capacity to perceive and plan in a changing environment in order to achieve desired future ends. Strategic planning therefore stresses the futurity of current decisions (*Steiner, 1979*).

"Strategic planning is a disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it."

(*Bryson 1988:1 in Bryson and Einsweiler, 1988*)

"Strategic planning is an approach to manoeuvring an enterprise over time through the uncertain waters of its changing environment to achieve prescribed aims."

(*Steiner, 1979*)

Strategic planning is a systematic, interactive process for thinking through and creating the community's best possible future, enhancing the organization's ability to identify and achieve specific, desired results. Ideally, strategic planning gives to the organization a more focussed understanding of its current position and future possibilities. "It is a process of exploring where one wants to go, by what time, what is needed to get there, and what one should expect to find when one gets there." (*United Way, Booklet 1, 1985*)

Strategic planning does not replace traditional planning activities such as budgeting, monitoring, marketing, reporting, and controlling. Rather, it is intended to integrate them into a broader context taking into account the community's external environment, its internal capabilities, and its overall purpose and direction. "It is different from other forms of management in that it insists that the organization (community) not only look at what it is, but form a vision of what could be or ought to be; and it emphasizes continuous interaction among planning, implementation and evaluation activities." (*United Way, Booklet 1, 1985*)

"Strategic planning in the public sector, as the latest step in the evolutionary development of decision making models, consequently differs from traditional, more established planning practices (long range and comprehensive) in its encouragement of" (*Lakeland Community Futures Strategic Plan, 1992*):

- Participation among diverse stakeholders
- An emphasis on action and results
- Consideration of internal and external factors of influence
- Bridging planning and implementation measures within an organizational entity
- Envisioning change rather than forecasting the past into the future
- Forces the organization to define what resources are required to take action
- Provides guidance for day to day operations

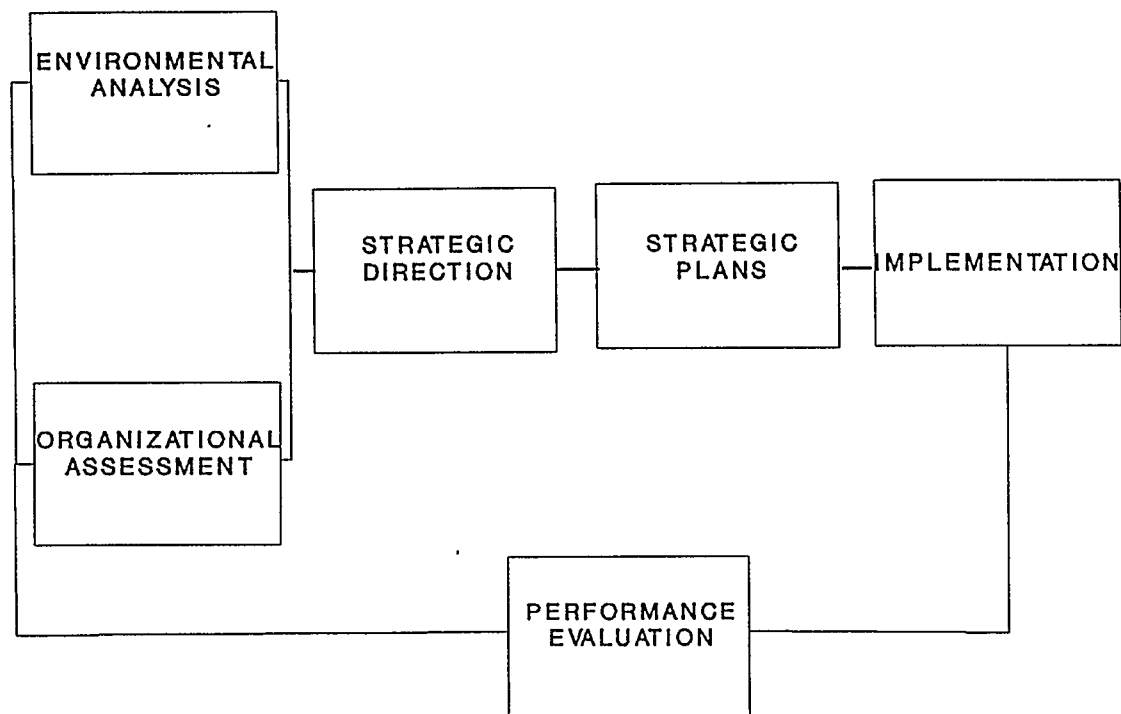
Strategic planning is, by definition, more than a process with an end. More important and more critical to its success is the processes' ability to inspire the use of strategic planning in making daily decisions that reach beyond the contents of a strategic plan. Effective and beneficial strategic planning becomes more than a process to endure and implement, it becomes a strategic approach to everyday thinking. The best strategic planners unconsciously move through a thought process that affects all facets of their day to day decision making process. Effective strategic planning is, therefore, equally a process of the intuitive as it is a process of logic and routine procedure. An effective process, rather than the product, would be therefore be more critical to the success of the strategy process in Cold Lake. The ability to encourage strategic thinking in the strategy process would also be one measure of the effectiveness of the process.

1.2.2 The SP Process Defined

There are numerous models or depictions of how strategic planning is to be operationalized, in either a private or a public sector environment. But all have a core set of activities: analyses of internal and external environments (SWOT); situational analysis; strategic direction; goals, strategies and actions; mission and mandate; implementation; and monitoring. This is illustrated in the United Way model, Figure 1-1.

A typical strategic planning process designed to be easily understood by strategic planning users is described as follows:

Figure 1-1 -- United Way Strategic Planning Model
(United Way, Booklet 1, 1985)

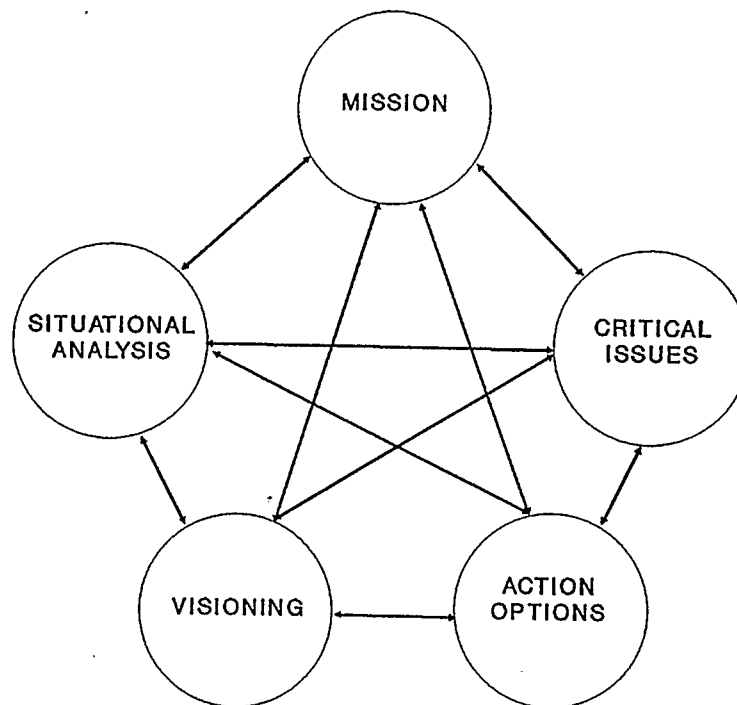


A realistic internal and external assessment of the present situation is conducted (SWOT). On the basis of this assessment, the process shifts to identification of one or more future directions for the organization. This future direction may capitalize on internal strengths or external opportunities, and/or mitigate internal weaknesses or external threats identified in the first stage of the process. The identification of a future direction may involve a visioning process such as vision statements or scenarios. Goals, strategies and actions that can capitalize on or mitigate identified conditions are then generated. The results of this work are packaged in a working document and work then begins on implementing identified initiatives. Monitoring of the strategic plan is ongoing, and the plan is modified as needed based on internal or external environment changes. A mission and mandate are usually drafted, which encapsulates organizational direction, vision, and actions in a short form suitable for presentation to organizational members and the external environment.

Though strategic planning models are drawn in linear form and completed in short time frames for ease of understanding, the process, as illustrated by the author, is often circular in nature and

continuous (*Figure 1-2*). Many elements of the process can be completed independent of each other or at overlapping temporal intervals. Strategic planning, like most day-to-day decision making, is more like a web than a straight line, with the individual fibres that comprise the web interdependent and yet at the same time mutually exclusive. Movement between different stages of the process can also be circular in motion, as particular steps may be revisited and modified based on the results of other stages of the process. Thus strategic planning is an inter-dependent process that emphasizes continuity and adaptability rather than a staged process which is completed at a singular point in time. The notion of strategic planning as a continuous activity was a key consideration in the Project Coordinator's decision to place emphasis on the internal environment, thereby delaying detailed analyses of the external environment.

Figure 1-2 -- Strategic Planning - A Circular and Continuous Process



1.2.3 The Benefits of SP

Proponents of strategic planning argue that strategic planning is effective at clarifying future direction, establishing priorities, making better decisions today in light of future consequences, making better decisions across all levels and functions, solving major organizational problems, improving organizational performance, dealing effectively with rapidly changing circumstances, and

building teamwork, morale, and expertise. (*Bryson and Einsweiler, 1988; Ohmae, 1982; Steiner, 1979*) Some of the many benefits attributed to its specific application to the public sector decision making process include its ability to educate the public, build consensus, develop shared vision, position organizations (communities) to seize opportunities, shed new light on important issues, identify the most effective use of resources, and provide a mechanism for public/private coordination. (*Kaufman and Jacobs in Bryson and Einsweiler, 1988*)

1.3 APPLYING STRATEGIC PLANNING TO ECONOMIC DEVELOPMENT

Traditional and new perspectives on "economic development" planning in communities are discussed in this section to illustrate how SP effectively integrates with community economic development principles. The merging of SP with Community Economic Development principles establishes a new style of decision making that is believed to be effective at meeting the needs of many communities, including Cold Lake.

Traditional perspectives on economic development are largely derived from industrial location theory in economic geography (*McNaughton, 1991*), including least cost location, friction of distance, economies of agglomeration, and economies of scale. Still a mainstream philosophy today, these theories are reflective of a belief that economic development is "controlled" by economic factors larger than, and outside the control of, communities. However, traditional location theory ignores the ability of human behaviour, human vision, and human determination to influence locational decision making processes. Strategic planning serves as a useful guiding tool in developing a greater balance between consensual and control aspects of economic development decision making, moderating the position of competing interest groups, and creating a shared perception of economic development problems. This view of economic development as a meshing of uncontrollable traditional location theory with perspective on community self-determination lies in sharp contrast to traditional economic development perspectives. (*McNaughton, 1991*) As will be shown in the remainder of the MDP, this "new" economic development perspective would be a core value of the strategy process conducted in Cold Lake.

Traditional economic locational theory would imply that an economic development program ought to focus on the attractiveness of the community to the industry or firm. While the attractiveness of the community to the industry would be an important consideration from a perspective of

community self-determination, additional considerations would include the attractiveness of the industry to the community (*McNaughton, 1991*) and the capacity of the community to overcome or minimize locational constraints by compensating in some other fashion.

Economic development is a poorly structured problem, and one that is difficult to analyze. "It is characterized by many decision makers, conflicting goals, many alternatives, and uncertain outcomes." (*Dunn 1981 in McNaughton, 1991*) One reason for the vigour in which strategic planning is being applied to economic development is, as *McNaughton* notes, the need for a focussed program that can concentrate limited resources on attracting and retaining economic activities that have the greatest potential for growth in a community (*McNaughton, 1991*). To achieve this, *McNaughton (1991)* argues that economic development planning can not be seen as distinct from other forms of community planning. Economic development goals and target markets need to be considered as an integral part of the community's master planning process. Only in this way can the community hope to mould itself into a superior locational product. Strategic planning can serve as this integrating mechanism, but requires that the scope of economic development initiatives be broadened beyond traditional retention and search for new business strategies.

Perks and Kawun (1986) argue that community and economic development planning objectives must be meshed, arising from concerns for municipal and community organization, community-based partnerships for plan implementation, role casting, and networking of resources. "Strategic Community Development flows from a conviction that the plan has to be conceived not as a function primarily or in the first instance of expert analyses and ideas, but rather, more as a function of community perceptions about 'self' and the 'outside world'." (*Perks and Kawun, 1986*) The *Perks and Kawun (1986)* conception of Community Development is one that knits together four perspectives in a common vision:

- Physical environment development and public environment improvement
- Community service development and improvements
- Local business resources development and enterprise initiatives
- Community organizational development for implementation initiatives

These branches span the spheres of economic, human and social services development, and conservation and renewal of physical environment resources, and incorporates an integrated, broad spectrum of Community Economic Development (CED) activity.

Strategic planning in a CED context can be a valuable coordinating mechanism for decision making and can broaden traditional views of economic development (i.e. smokestack chasing, "establish new businesses only") to incorporate other mutually supporting social, political, and economic initiatives. The Chapter 3 account of the Cold Lake strategic process illustrates the decision making process that created a holistic scope of CED activity. Chapters 4 and 5 further conclude that SP can coordinate community decision making and direction setting, and can broaden traditional views of economic development.

1.4 DESIGNING A STRATEGIC PLANNING PROCESS FOR COLD LAKE

1.4.1 The Perks/Kawun/Macdonald Strategic Model

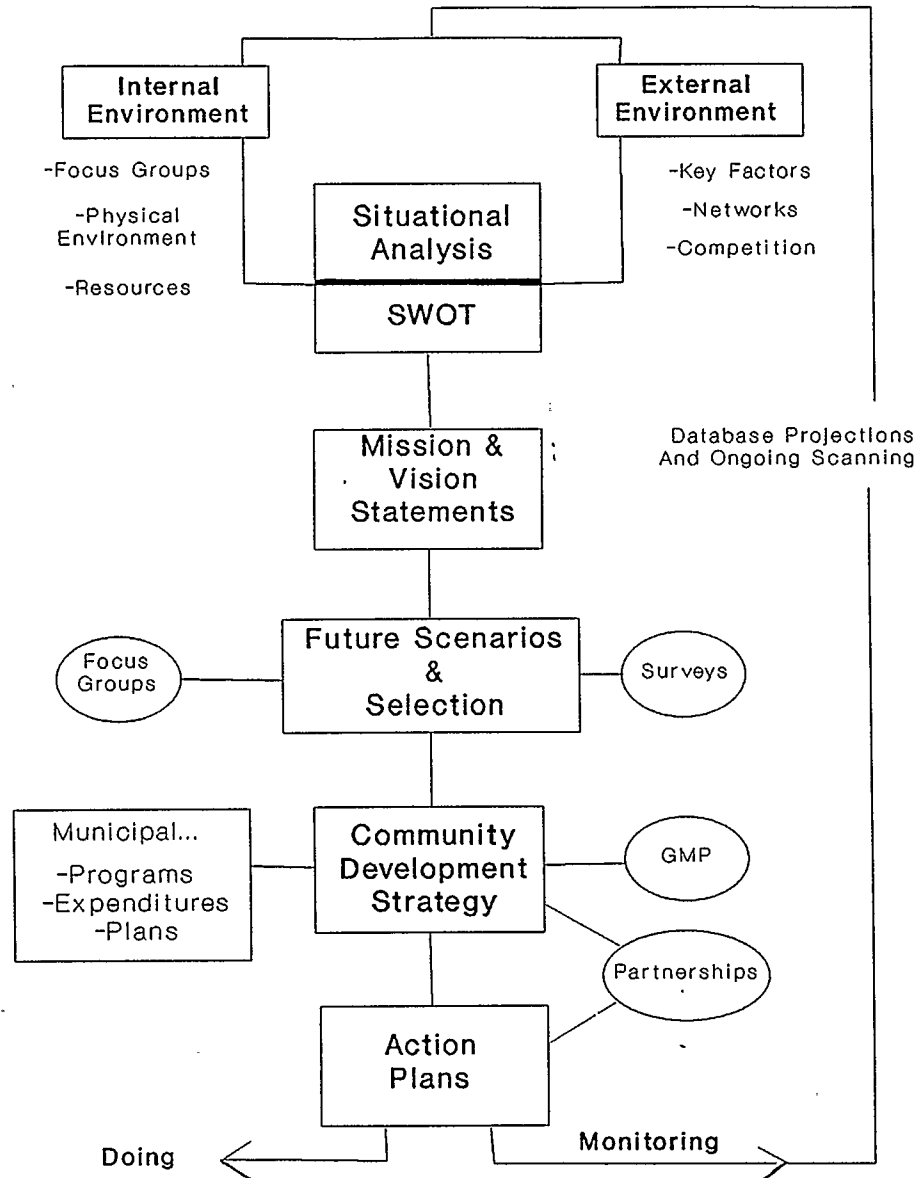
The strategic planning model chosen to facilitate the strategy process was designed specifically for public sector community economic development planning, and has recorded a relatively high level of success in other rural Alberta communities: the Crowsnest Pass (1986); Airdrie (1989); and Stettler (1991). The Perks and Kawun (1986) and Perks and Macdonald (1990) model incorporates traditional strategic planning activities, including assessment of the internal and external environments (SWOT), Situational Analysis, scenario writing, and action plans (*Figure 1-3*). The model's strengths include its participatory nature, its ability to be broadened to the wider context of community decision making, ease of participant understanding, its flexibility and adaptability, and the ability to build from within community institutions. (*Perks and Kawun, 1986*)

1.4.2 Adaptations of the Perks/Kawun/Macdonald Strategic Planning Model

The Perks/Kawun/Macdonald model was modified based on the Cold Lake situational context (See Chapter 2). The Project Coordinator's perceptions of the model's strengths and weaknesses as it was applied to a development strategy process in Stettler, Alberta also resulted in modifications to the strategic model*.

*The Stettler Project embraced four workshops and a public forum. With the exception of the visioning process, which incorporated the use of scenarios rather than vision statements in Workshop Two, the Stettler and Cold Lake strategy processes bear strong resemblances to each other.

Figure 1-3 -- The Perks/Kawun/Macdonald Strategic Planning Model



Three key adaptations were made to the Perks/Kawun/Macdonald model to reflect these considerations:

1. Use of "critical issues" identification to give greater continuity to the process

The Project Coordinator perceived lack of workshop continuity as a weakness of the Stettler process; there was a lack of connection between particular project stages (workshops). Lack of connection between workshops could result in participant difficulty

in understanding a new concept (SP), a reduced level of participation, and greater probability that work completed would not be substantive nor of reasonably high quality. The use of "critical issues" identification served as a useful coordinating mechanism for workshop continuity. This adaptation is thought to create a better integration of all workshops, particularly the Situational Analysis (Workshop Two) and action planning phases (Workshop Four) of project work.

2. Modification of an externally-driven scenario-writing exercise to become an internally-driven vision statement exercise

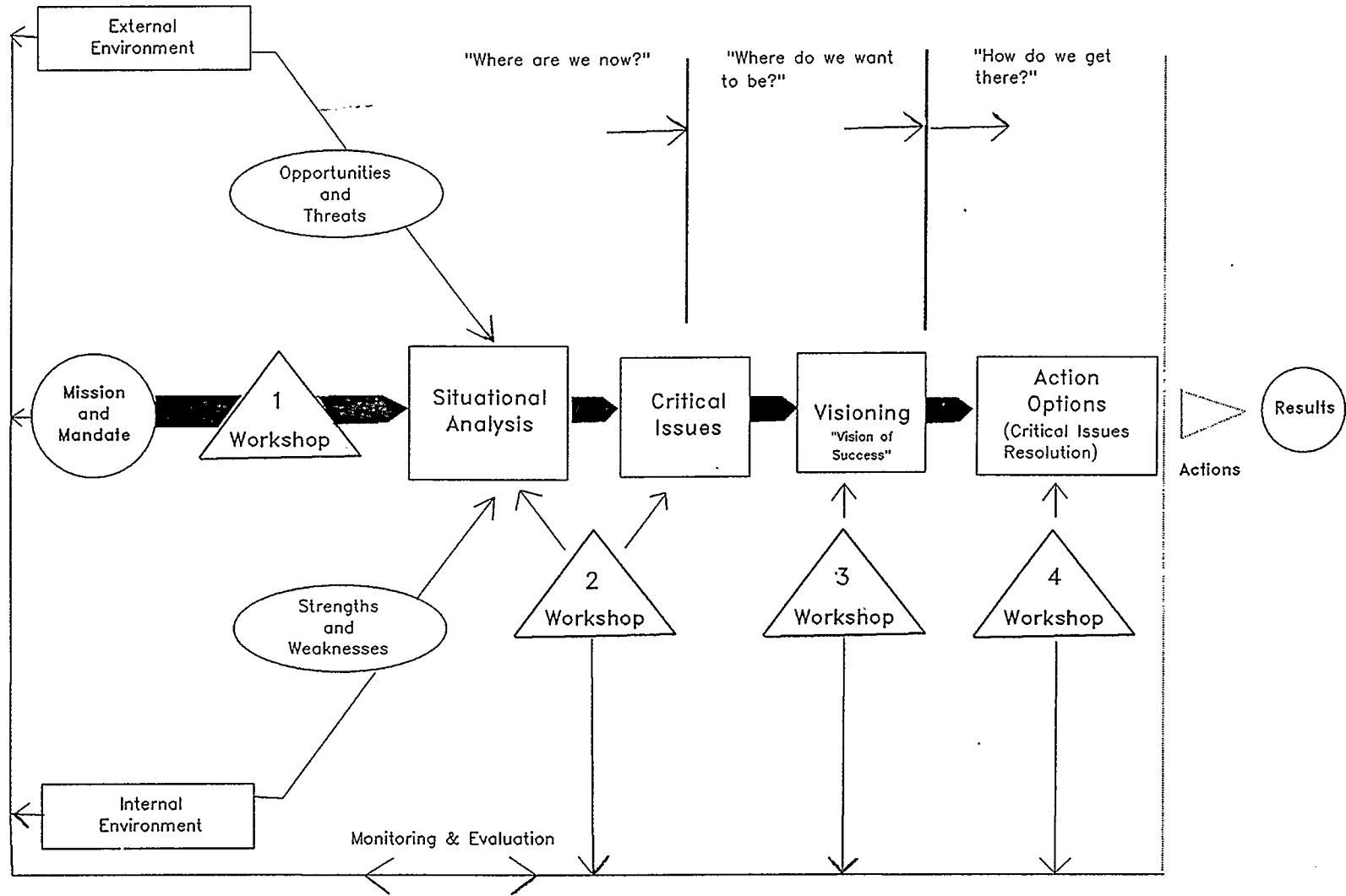
Based on Cold Lake's situational context, the Project Coordinator concluded that developing the means for the community and its decision makers to build internal capacities would be key to the ultimate effectiveness of the strategy project. The thesis for this conclusion is developed in Chapter 2.

3. Presentation Style of Vision Statement

To encourage community "buy-in" to the Economic Development Strategy, the writing and presentation of the Vision Statement became a creative and internally-driven exercise. The presentation of the Vision Statement was unusual and unique. The rationale for this adaptation is constructed in Chapter 2.

Adaptations made to the Perks/Kawun/Macdonald model to suit Cold Lake purposes resulted in a similar process, but a process perceived by the Project Coordinator to be better suited to the project-specific needs of the client group and the community. This process is illustrated in Figure 1-4. The sequence of the project's activities were designed to be sympathetic to the interplay of issues, attitudes, and forces operating in Cold Lake. The project began with analysis of the internal and external environments, followed by identification of strategic issues, followed by a visioning process, followed by resolution of strategic issues (through production of both vision statements and a strategic issues resolution exercise), and finally identification of a mission and mandate based on project findings.

Figure 1-4 -- Cold Lake Strategic Planning Process



The SP model devised by the Project Coordinator was felt to provide the best opportunity for the strategy process to be effective, and achieve results for the client group and the community. This conclusion is based on the findings of an assessment of the Cold Lake situational context (See Chapter 2 for the assessment), the benefits and composition of SP, the ability of SP to be an integrating mechanism for a meshing of SP and CED principles, and practical project experience with the Perks/Kawun/Macdonald model in Stettler.

Chapter 2
ISSUES, TRENDS AND CAPACITIES IN COLD LAKE -- THE SITUATIONAL CONTEXT

*"The Analyses (of internal and external environment's) have to be situational and community context-specific. Local wisdoms have to be incorporated
-- and sometimes confronted or challenged."*

(Perks, W.T., "Scenario Writing In Vivo", 1990)

This Chapter provides an analysis of the community's historical, economic, social, and political foundations. The conclusions drawn from this analysis significantly influenced the Project Coordinator's approach to the strategy process; these influences are described in an account of the strategy process that follows in Chapter 3. The Chapter concludes with a discussion of the modifications made to the Perks/Kawun/Macdonald strategy model to make a better fit between the strategic process and its specific application to Cold Lake.

2.1 HISTORICAL OVERVIEW AND PRESENT CONTEXT

2.1.1 From Stone Tools To Pelts To Faster-Than-Sound Jets

Incorporated in 1957, Cold Lake is a youthful town, but the area's history dates back 10,000 years. The Chipewyan Indians hunted, trapped, and fished in the area and camped on the shores of Kinosoo ("Big Fish") Lake. Voyageurs on the Beaver River began the fur trade and arrival of the white man in the late 18th century. Further south, near Elk Point, the Hudson's Bay and Northwest Companies established the first fur trading posts on the North Saskatchewan River in Alberta in 1792.

The white settlers who appeared in the area around 1905 engaged in trapping, fishing, logging and farming. The community grew slowly, remaining small and economically subsistence-based. Early photos of Cold Lake's early years show a community dotted with waterfront businesses: two hotels; a corner store; a theatre; a hospital; a hardware store; a local newspaper; a community hall; a bank; a fishery; and tour boats. Whitefish were caught in Cold Lake through the 1920's and 1930's and shipped frozen to New York City, where it appeared as a delicacy in the finest restaurants. Cold Lake was also a tourist destination; spring brochures touted the "shark-sized" fish that could be caught - in addition to Northern Pike, Perch, and Pickerel, record-sized Lake Trout could be had.

Over time, four distinctive events made significant impacts on the local economy and way of life:

-Depletion of Fish Stocks in the 1930's: Prosperity was greatly threatened when record-sized fish became harder and harder to find and progressively smaller and smaller. The lake was overfished; and its depth and cold temperature meant an extremely slow replenishment of stock.

-The Bailey Creamery - 1933: Cold Lake was the commercial centre for the area; mills and fisheries harvested the forests and the water, providing impetus for a steady opening of businesses. However, in 1933, Ralph Bailey approached Cold Lake officials and landowners to seek a business site. His efforts were stalled by the Council, so Bailey vowed to find an alternative location. He did just that, at five kilometres south near a proposed railway extension. New businesses in the area subsequently gravitated to Bailey's new creamery and a small collection of homesteads established there, which were later incorporated as the village of Grand Centre. By 1950, Grand Centre residents had convinced the C.N.R. to establish a spur line, thus isolating Cold Lake from rail access. Without rail access, and with a succession of Councils that spurned development, Cold Lake slowly transformed into an island of residences. Businesses closed, only to re-establish in Grand Centre.

-Canadian Forces Base Cold Lake - 1955: The commercial centre-commuter suburb relationship now established between Grand Centre and Cold Lake was solidified with the building of Canadian Forces Base Cold Lake (now 4-Wing) just west of Grand Centre. Grand Centre was the most central of the three communities and thus the most preferred for business development. Grand Centre's commercial growth had momentum, a phenomenon that continues to this day. A very small village at the time of base construction in 1955, Cold Lake and area soon after experienced a modest residential boom; it has continued relatively unabated over the past 35 years. However, although Cold Lake's population grew, its commercial status steadily declined, bottoming out in the early 1980's.

-Oil Discoveries - 1980's: Situated on the south edge of a vast pool of sandy oil that stretches north to Ft. McMurray and is estimated to contain more oil reserves than the Persian Gulf, Cold Lake's second boom came in the early 1980's with the construction of the Imperial Oil Resources Ltd. oilsand extraction plant at Ethel Lake. Though the majority of Imperial employees located in Cold Lake, the growth did not shift Grand Centre's commercial momentum. The discovery of oil

and the continued expansion of 4 Wing accounted for Cold Lake's status as one of the fastest growing Alberta towns during the 1980's.

Though the community has grown steadily in population, by 1992 community leadership was expressing an interest in stimulating business development and tourism. Community leaders hoped that new businesses would provide the community with new vitality and pride, a revived economic base, and much needed tax revenues. There was an expressed desire for a strategy that might begin to reverse long established historical trends. However, sixty years of passive community leadership attitudes towards development had germinated many longstanding, fatalistic attitudes that would have to be addressed and overcome in an effective strategic process.

2.1.2 The Current Business Environment

Recent business development successes appear to be heralding a new period for the realizing of Cold Lake's business development potential. Successes can be attributed to a number of factors: changing Town Council attitudes about development; reduced defense personnel transience which has increased confidence and interest in business and other initiatives; and the community's significant asset of a waterfront setting. Recent business developments or activities include an eleven room waterfront bed and breakfast with teahouse (1991), a bowling alley and attached cafe (1991), a bar (1992), and the renovation of the original General Store (est. 1925) as a soda parlour and ice-cream shop that also displays historical items (1992). Three additional high points include the construction of the Regional Hospital in the mid-1980's, the construction of a \$6 million, 250-berth marina facility in 1989 (the largest non-coastal marina in Western Canada), and the locating of the north campus of Lakeland College in Cold Lake in the late 1980's.

However, despite these indicators that Cold Lake may be moving out of its "non-residential development" doldrums, visual evidence and current residential taxation levels indicate that vigorous efforts to strengthen the business environment will have to remain a political priority. Numerous parcels of commercial space in Cold Lake (particularly the lakefront) remain vacant, in contrast to expected short-term shortages in serviced residential land. And there are no significant industrial enterprises in Cold Lake.

2.1.3 Demographic Factors

Cold Lake has a relatively youthful population -- only 12% of the population are age 45+. This compares to the provincial average of 30% age 45+. The age 55+ cohort is marginally decreasing, in both proportion and number. Cold Lake has proportionately higher numbers of residents age 0-14 and a proportionately low population age 15-19. The drop in the 15-19 age bracket is typical of many rural communities -- a majority of high school graduates move out to pursue secondary education or job opportunities elsewhere. Rather atypical in the rural Alberta context, however, is the significantly higher proportion of residents age 20-44. The demographic profile just outlined can be attributed to a number of factors, including community transience, an influx of youthful military personnel and oil industry workers, lack of post-secondary educational opportunities, and factors that discourage retirees from moving to Cold Lake, such as distance to metropolitan centres, and a cold winter climate.

The presence of the defense industry (4 Wing) has produced a highly transient community: approximately 55% of the population have resided in Cold Lake less than five years, down from approximately 60% in 1986. But changing Defense Department policy in recent years has resulted in increased duration and permanency of postings, and reduced transience. There is now a small but growing population of military personnel who are "senior" residents in the community. A larger proportion of the labour force are establishing roots -- or a sense of permanency -- in the community, creating new community development opportunities.

The falling numbers of youth (15-19) and seniors, significant but falling levels of community transience, and the relative youth of the labour force, were all felt to be significant issues worthy of consideration by workshop participants in the strategy process, and in the research conducted for the Situational Analysis. For example, how can positive changes, such as reduced community transience, be tapped for new investment and contribution to community initiatives? How can negative changes, such as falling numbers of seniors and youth, be mitigated through strategy initiatives? Should these changes even be considered in the strategy process?

2.1.4 Labour Force and Employment

There is relative employment stability, due to the presence of the oil and defense industries, and most particularly by the recent employment growth of the largest local employer, 4 Wing. The

unemployment rate has fallen steadily from a high of 10% in the early 1980's, and now stands at only 4%.

However, Cold Lake's dependence on out-of-community sources of employment has been rising over the last ten years. Residents leave the community for jobs on the Base, in the oil industry, or at Grand Centre where the majority of business and industry is located. Today, only 20% of the labour force residing in Cold Lake works in Cold Lake, down from 25% in 1990. Today, the oil and defense industries together employ approximately 50% of Cold Lake's labour force.

Labour force and employment issues and trends would have to be discussed in the strategy process with the aim of either resolving or refuting their importance as issues or critical issues. The relatively stable economy might reduce interest in diversification initiatives, and might colour perceptions of the importance of a strategy process to the future economic, social, and political well-being of the community. Economic security might also compromise commitments to the both the strategy process, and the product -- a consideration that would have to be addressed through the style and content of the strategy process.

History, demography, and labour and employment trends and issues have shaped community capacities for planning and developing community direction in a strategy-making process. The interaction of these trends and issues over many years have manifested themselves in administrative management and political leadership style and approach. Community transience, and the commercial presence of Grand Centre are two particularly key factors contributing to many of the community organizational characteristics and attitudes that would shape the content and style of the strategy process: lack of belief in the economic viability of new business ventures in Cold Lake; lack of investment or ideas for new business ventures, volunteer burnout and a reduced volunteer pool; and low levels of interest in, and commitment to, community affairs.

2.2 ANALYSIS OF COMMUNITY CAPACITIES

The ability to undertake and achieve success in strategic community economic development is dependent upon two "key actors". The first -- the facilitator or project coordinator -- is critical to project design and direction, to its continuity, and to ensuring the effectiveness of both the process and the end product. The second is a set of actors -- the community; specifically the "capacities" of the decision making actors in the community to participate in, commit to, and bring planning

decisions to fruition. Perks (*Perks and Kawun, 1986; Stettler Economic Development Strategy Reference Material, 1992*) defines capacity as the combined abilities of the Municipal Corporation (Council, committees, administration) and its community-based interest groups and organizations to:

- Provide leadership
- Marshall resources of people, money, expertise, networks, etc.
- Plan continuously
- Manage -- the organization's programme, projects, volunteers, etc.
- Communicate -- ideas, issues, decisions both within the community and to the outside world.
- Obtain local commitments of key actors (local, and government departments), and politicians

Further, community capacities are something that have to be mobilized and developed within the context of a particular problem or set of issues, a particular project, and a particular context; in this, particular opportunities and threats come to be defined. Capacity is determined by:

- Available expert skills, talents, knowledge and experience
- Technologies at hand
- Communication and information flows
- Financial resources at hand and/or readily obtainable for organizational and management needs, for communications and marketing, and for "buying" skills and knowledge that can't be found in the community
- Learning -- transferring to "us" what we learn from "them" (experts, consultants, etc.)
- The time and energy of volunteers, municipal administrators, politicians, etc.

In any municipal plan-making project, the facilitator must be keenly aware of the community-representative decision making structure that operates. This decision making structure -- Council and its designated sub-committees and arms-length boards -- are charged with steering economic and social developments. Power and responsibility will vary among the Council and its designated committees, depending on the nature of the project. Thus, all plan-making must take into account the relative strengths and weaknesses of a municipal decision making structure's current and potential capacities -- most especially, the capacity to tap internal and external resources, and to adjust planning activities accordingly.

"The role of leadership, institutional and regulatory forces, organizational structures and cultures, and particular events and incidents leading up to the initiation of a strategic planning effort are all key factors, which taken together, indicate that strategies do not take place in a vacuum, but are instead motivated by specific incidents and intentions, and shaped by particular generative situations that lead to their initiation." (*Mintzberg and Waters, 1985*)

The assessment of capacities in Cold Lake involved a community survey conducted in August 1992, information gathered from Workshop One (Community Reconnaissance), and independent observations made by the Project Coordinator. The remainder of Chapter 2 now provides a summary overview of community organizational capacities, and their implications for the strategy process.

2.2.1 Community Organizational Strengths and Weaknesses

The position of the Cold Lake community at the outset was as follows:

The Strengths

a) Economic Development Committee (EDC)

- An amalgamation of two committees -- tourism, and downtown revitalization -- formed an Economic Development Committee (EDC); this would improve communication and committee effectiveness.
- Pursuit of funding for the Economic Development Strategy through the provincial government BIAC program indicated the existence of initiative and the desire to move forward with plans.
- Discussions had taken place with the EDC in Grand Centre prior to the project start-up, with the intention to create a position for a joint Economic Development Officer (EDO). This was economically and practically, of greater advantage than having a EDO in each community.
- The Cold Lake EDC had already gained some economic development experience through recent work in the area of downtown revitalization and Community Tourism Action Plan application assessments.

b) The Town Council and Community Committees

- Recent discussions about amalgamation of 4 Wing, Grand Centre and Cold Lake indicated concern for long range planning and the long-term economic benefits of short term decisions. Many in the community had recognized that successful conclusion of these discussions would greatly aid economic development efforts by creating a marketable profile for "Alberta's Eighteenth City", inject greater expenditure into economic development, and coordinate efforts between communities already closely linked both socially and economically. A consultant's report was completed, but tangible action to amalgamate will likely take years to conclude.
- Recent signs of capacity-building through increased communication with government agencies and other organizations in a position to help the community with technical assistance.

The Weaknesses

a) Economic Development Committee

- "Tourism as saviour" mindset. This later proved to be of limited scope
- Recent amalgamation of two committees to form the EDC meant committee was in its youth and displayed youthful characteristics: disorganization, lack of unity in direction, lack

of clear mandate

- A large and unworkable committee (11 members)
- A certain lack of commitment exhibited by committee members -- poor attendance, little productive participation, private rather than community economic development agendas brought to meetings.
- Personality conflicts among EDC members
- The EDC had recorded few accomplishments and had little reputation or "standing" with Council or in the community. Although five months old, the committee had not recorded any accomplishments other than to secure funding for the EDC's proposed Strategy project. Further, the EDC was not recognized by a clear mandate from Council.
- No clearly stated goals and little sense of direction (no mission or mandate) other than reactive review processes (eg. CTAP application processing)
- No employed economic development officer, even though the bylaw creating the committee contained a stipulation requiring the hiring of one. Without a full-time, employed leader, volunteer burnout in the community was further accentuated.
- Unresolved issues such as whether or not to employ an economic development officer after project completion. This lack of forethought had the potential to reduce the effectiveness of the Economic Development Strategy in implementation stages; and it threatened a reversion to past ways or the status quo after project completion.

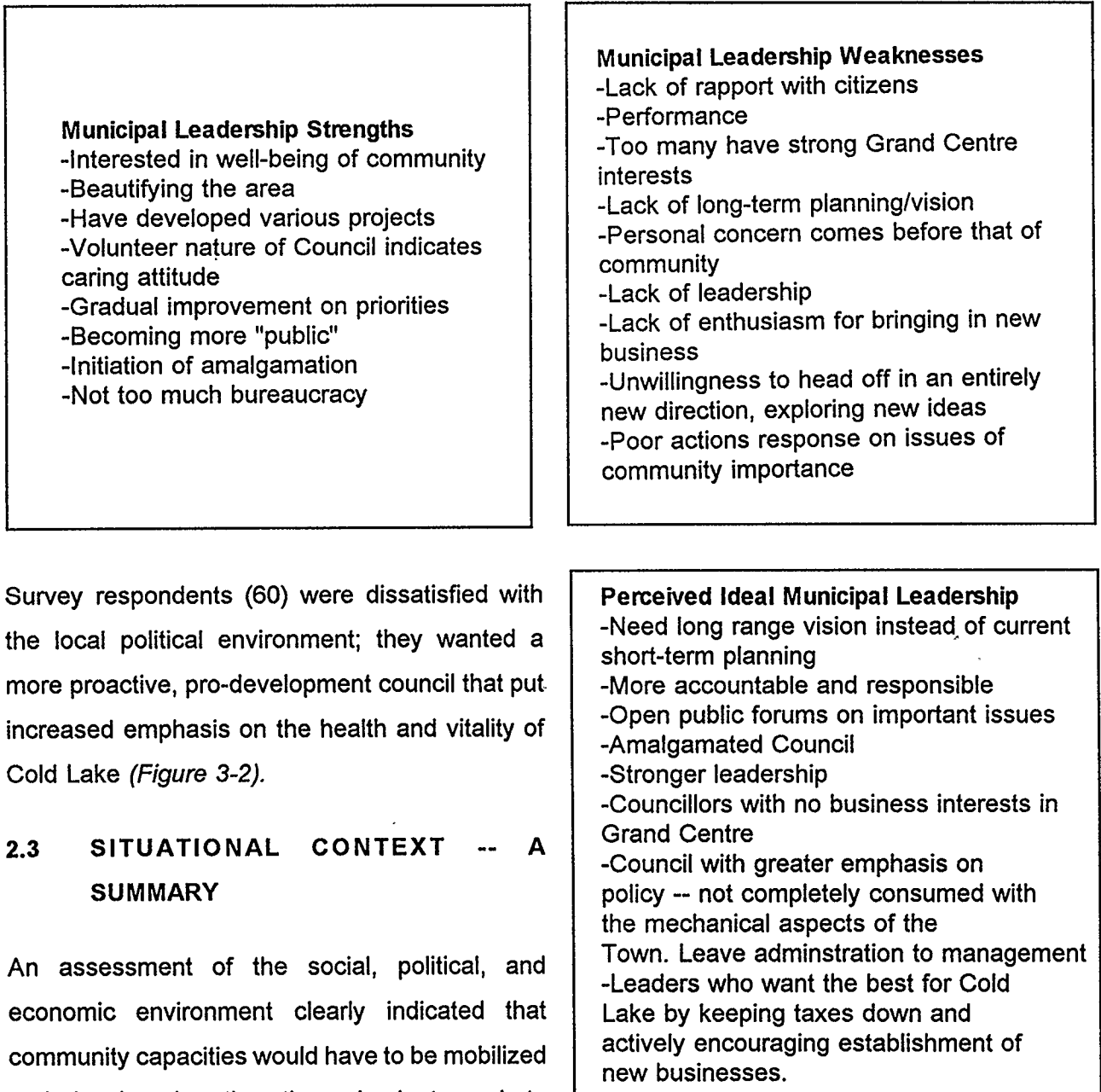
b) Town Council and Community Committees

- A long history of anti-development attitudes and reactive policy-making (interview results)
- A certain lack of communication with regional agencies, and a lack of participation in regional initiatives (eg. Community Futures, marketing and promotion). External decision makers and organizations indicated that the community's decision makers and municipal administration did not have a positive reputation.
- Little indication of long range planning other than the recent amalgamation discussions. This was often manifested in planning decisions reflective of a mentality that any development proposal had to be accepted or Grand Centre would get it. A lack of proactive planning was displayed by both Council and administration (eg. building only single family houses, neglecting excellent-quality, vacant commercial land, and neglecting action on several other improvement initiatives.
- Dismissal of the Town Manager mid-way through the strategic planning project; the project likely suffered with the loss of a significant power-position participant in the process. This situation was complicated by the (still) vacated position at the project completion.
- There was initial scepticism (the EDC and Council) about strategic planning and how it might benefit the community. Steiner (1979) notes that many people have within them anti-planning biases, because planning alters interpersonal relationships, planning changes information flows, decision making, and power relationships; planning may highlight conflict in organizations; operating problems can drive out planning efforts; there are risks and fears of failure, a desire to avoid uncertainty, and authority conflict. Participant's with these types of attitudes can simply "go through the motions", only to discard or ignore the product once completed.
- Municipal election, October, 1992. This would disrupt the strategic planning process and have a negative impact in terms of commitment building, Council "buy-in", and reduced implementation effectiveness.
- Volunteer burnout: A number of community volunteers were sitting on two or three committees.
- Crisis management tendencies

2.2.2 The Community Survey: Strengths and Weaknesses

A community survey completed in August, 1992 indicated that changing the style of community leadership and decision making was a priority issue for residents of Cold Lake.

Figure 3-2 - Municipal Leadership Strengths and Weaknesses, and Ideal Leadership Qualities



development of a process that encouraged capacity-building. What level of understanding of strategic planning and its value are the participants to achieve? How could the process be made more interesting to maintain a high level of client and community interest, and provide some inspiration for continuing on with the process? What style or procedure would grab participant's attention? How would the impending Council election be planned for? Who would participate in the process? How would input and feedback be received from community residents? How could Cold Lake's history, demography, labour and employment, and organizational pre-dispositions and characteristics be overcome, or planned for in the strategy process?

The Project Coordinator's response to these questions came in the form of modifications to the Perks/Kawun/Macdonald model to achieve Cold Lake project goals, and results for the client group and the community. Assuming that the strategic planning process would only begin with the development strategy project and continue on after the Project Coordinator's departure, the process was designed to concentrate energies on assessment and action planning for the internal environment. This emphasis appeared to respond to community sentiment about a desire to discuss and resolve important, localized community issues; it also responded to the project's short time frame, and the EDC's characteristics. The Project Coordinator's task would therefore be to channel this discussion into a process that could lay out a course of action to follow.

Specific modifications that emphasized the internal environment included workshop participation, workshop procedures, issues identification, the writing of vision statements, and the style of vision statement presentation at the completion of the project. Despite the serious nature of the strategy process, the workshop participants would be offered the opportunity to enjoy themselves, think about the future of their community freely and creatively, generate and resolve important issues, and identify tangible actions for the EDC and the community to complete. The process created was highly interactive.

In an ideal process an initial emphasis on the internal environment would provide the client group and the larger decision making environment with the tools and the capacity to expand the scope of strategic planning as abilities, knowledge, and the level of comfort with strategic planning improved. An expansion of scope would include more detailed planning in relation to the external environment.

THE COLD LAKE PROJECT: AN ACCOUNT OF THE STRATEGIC PLANNING PROCESS

"Plans sometimes may be useless, but the planning process is always indispensable"

*Old Military Saying
(Steiner, 1979)*

Chapter 3 gives an account of the construct, process, and results of the four strategic planning workshops conducted in Cold Lake during the course of the project. The account begins with a first Workshop held in June, 1992, followed by a description of the June-September research activities completed for the Situational Analysis, and an account of Workshops Two, Three, and Four held in October and November. The account ends with the Final Presentation to Council on December 8, 1992. "Footsteps of the Future", the "grand" Vision Statement, winds up the Chapter. Adaptations of the Perks/Kawun/Macdonald strategy model (*Perks et al, 1986, 1990*) -- issues identification in Workshop Two, the use of vision statements rather than scenarios in Workshop Three, and the technique used in the final presentation to Council -- highlight the Chapter.

3.1 WORKSHOP ONE -- A COMMUNITY RECONNAISSANCE

Workshop One was conducted in a three-hour evening session June 30, 1992. The workshop emphasized participants' identification of what they perceived to be Cold Lake's (S)trengths and (W)eaknesses, and (O)pportunities and (T)hreats (SWOT), to which the community might be able to respond to through strategy. As the performance of SWOT analysis forms the guiding structure of strategic planning, the identification and ranking of participant perceptions was seen to be a valuable initiation to the strategic planning process.

3.1.1 Workshop One: Process and Techniques Employed

The Economic Development Committee (five of the eleven members attending), a Council representative, and the Town Manager attended. Workshop participants were asked to say what they perceived to be Cold Lake's greatest strengths, weaknesses, opportunities, and threats with respect to present and future impacts on community development.

Community Strengths and Weaknesses

Following listings and round-table discussion of strengths and weaknesses, the participants were asked to rank each of them. Of the top, seven-ranked strengths, six focussed on the physical/natural environment. Only one of the top-ranked strengths - "high quality of life" - addressed the social component. Lower-ranked strengths primarily addressed economic, social, and infrastructure issues. The low ranking given to social issues is particularly interesting, considering the relative importance social issues assumed in the final product. This shift in emphasis may have been a product of the mindset of the expanded group of workshop participants in a later phase of the project, or a result of new insights provided by the Briefing Notes and workshop participation that came later.

Weaknesses clearly pointed to the community's inability to establish a decision making environment that fostered change, provided the community with the ability to attract "outsiders" (tourists), or that encouraged businesses to establish themselves in Cold Lake. A "lack of leadership" was identified as critical.

Development Opportunities and Threats

Each workshop participant was asked to generate a list of opportunities for, and threats to, future community development. Opportunities and threats were defined by the Project Coordinator as being local strengths or weaknesses, or trends in the environment outside Cold Lake (regional, provincial, national, international) that could be capitalized on (opportunities) or which would require mitigation (threats). The wording was chosen so as not to prematurely restrict thinking to an a priori categorization of internal and external environments.

Results predictably focused on internally-rooted opportunities and threats. The list of opportunities focused almost exclusively on the tourism industry. This is notable, considering the broad context of the final product's subject matter. Results also indicated awareness of a relationship with the external environment, particularly the implications of Grand Centre's relative location, and diversification opportunities presented by the defense and oil industries. Perceived threats focussed exclusively on lack of community direction and vision; it also pointed at uninspiring town leadership as the chief obstacle to setting a strategic direction. Local attitudes and lack of

involvement (and as a result lack of input in setting a future direction, or having a vision) in the community were seen as the greatest barriers to change.

Time constraint did not allow for the production of a list of Key Driving Forces; nor for a discussion of the research, analysis, and surveys needed for the Situational Analysis. These items were rescheduled to an EDC meeting in July.

3.1.2 Workshop One Outcomes

A summary of Workshop One was prepared in the form of a Briefing Note (*See Appendix A1*). It was presented in four sections: 1) Community Strengths; 2) Community Weaknesses; 3) Development Opportunities and; 4) Threats to the Community. The Briefing Note suggested that the highest ranked strengths, weaknesses, opportunities, and threats would have to be effectively addressed if the community was to plan effectively. Participants were also asked to consider what changes the community would have to make to effectively address the highest ranked SWOT indicators.

A positive outcome of the failure to address Key Driving Forces was that emphasis was placed on internally driven issues. These were collectively identified as being a priority.

3.2 SITUATIONAL ANALYSIS RESEARCH - JULY-OCTOBER, 1992

A Situational Analysis represents the marriage of analyses of the internal and external environments for purposes of establishing strategic direction and the strategic agenda. At this stage, research, analyses, and discussion identifies community strengths or weaknesses that need to be improved or changed, or environmental opportunities and threats that require the accessing of community capacities to capitalize on or to mitigate.

The Project Coordinator provided a list of potential subject matter with which to assess the internal and external environments at an EDC meeting on July 6, 1992. The list was derived from Workshop One discussion, and from additional research by the Project Coordinator. The EDC was asked to select the most critical subject matter for the Situational Analysis from the list provided, or to generate other topics. He also stressed that research work completed for the project was not

designed to be exhaustive or comprehensive but would be narrowly selected from a potentially-innumerable set of environmental conditions. EDC members were asked to consider two criteria:

- Assess only the most critical environmental conditions which may significantly impact on the organization's ability to achieve an established mission and mandate (to be identified at a future date);

- Recognizing human and financial resources, limit the scope of analyses to a digestible portion of environmental conditions exerting influence on the community.

EDC members were reminded that effective strategic planning is a continuous process, with a beginning but no end. The EDC's chosen set of analyses would not be the end, only the beginning of a journey of discovery about their community. The following items were thus targeted for further research in a Situational Analysis:

Internal Environment

- Local Labour Force
- Town Appearance
- The "Municipal Corporation"
- The Oil Industry
- Tourism
- Seniors
- Youth

External Environment

- The Oil Industry
- World Political Stability (Implications to Canadian Forces Bases)
- Demography and Lifestyle

The Project Coordinator spent the months of July, August and September acquiring and analyzing information and organizing findings in documented form.

3.2.1 Survey Research

-Regional Tourism Survey

A tourism survey sought tourist feedback about likes, dislikes, and suggested improvements (See Appendix B - "Regional Tourism Survey"). Three hundred and fifty surveys were distributed to various tourism venues, such as the local motel, bed and breakfast, the provincial park campground, etc. The results of the fifty responses were included in the Tourism Briefing Note.

-Community Survey -- Cold Lake and Grand Centre

The community survey addressed perceptions of quality of life, conditions for youth and seniors, the present and future state of 4 Wing, and the oil industry, the retail sector, tourism potential, views about the "municipal corporation", economic development and the future, and what the economic development priorities ought to be (*See Appendix B - "Community Survey"*).

A random mail survey was issued to 250 Cold Lake residents and 200 Grand Centre residents. Grand Centre residents were given the opportunity to comment on perceptions about their community to provide fodder for Workshop Two discussion about perceptual similarities and differences between the two communities. The results of seventy responses by Cold Lake residents and twenty-five from Grand Centre residents were used to supplement, where applicable, Briefing Notes prepared for the Workshop Two Situational Analysis.

-Youth Survey

A youth survey asked Grade 12 students for their likes and dislikes about the community, future plans, educational needs, and indications about whether they expected to remain in the community after graduation (*See Appendix B - "Youth Survey"*). The sixty-five surveys completed by three Grade 12 English classes were summarized in a "Youth" Briefing Note.

3.2.2 Key Informant Interviews and Data Gathering

The majority of the Situational Analysis Briefing Notes were completed by conducting interviews and by a review of documents and other written material:

- The "Oil Industry" Briefing Note was based on an interview with Imperial's public relations officer, as well as discussions with local Imperial employees.

- The "Seniors -- The Silver-Haired Industrial Base" Briefing Note was based on interviews with several seniors as well as census information.

- The "Town Appearance" Briefing Note was based on a photographic exercise conducted by the Project Coordinator.
- The "Tourism" Briefing Note relied on the tourism survey, a review of several consultant reports, discussions with several community residents, and readings on tourism trends.
- The "Municipal Corporation" Briefing Note relied primarily on the incorporation of survey respondent's perceptions.
- The "Labour Force" Briefing Note accessed local census results.
- External Environment Briefing Notes on the Oil Industry, and on Demography and Lifestyle accessed research and briefing notes produced for the Stettler development strategy project. Additional external environment material was discussed and/or produced based on various trends research, magazine and journal articles, and newspaper scanning. A Briefing Note on "World Political Stability -- Implications to Canadian Forces Bases" was not completed.

The findings of the SWOT research were packaged as Briefing Notes and distributed to participants prior to Workshop Two (*See Appendix A*). An excerpt from one of the Briefing Notes is presented in Figure 3-1 (*See Appendix A for examples of full Briefing Notes*). External Environment Briefing Notes were organized to indicate trends and associated opportunities and threats.

3.3 WORKSHOP TWO -- SITUATIONAL ANALYSIS AND CRITICAL ISSUES

Workshop Two was conducted the evening of October 8, 1992 in a four hour session. Community members joined the EDC and the Council representative to form the group of project participants for the remainder of the process. Workshop Two was split into two parts:

- Part 1 - The Situational Analysis, using the Briefing Notes that reported the findings of community surveys and other research completed.
- Part 2 - Further Issues Identification: the generation of critical issues was based on discussion of the Briefing Notes in Part 1 of the workshop, and any further participant wisdom about the forces and issues at work in their community.

Figure 3-1 - Sample Briefing Note

LABOUR FORCE - SUMMARY	
Strengths	<ul style="list-style-type: none">-Oil industry and CFB Cold Lake are large employers, accounting for the direct employment of 50% of Cold Lake's labour force.-Very high proportion of working Town people are wage earners (96%).-Very low unemployment rate (4%) – has been falling over the last decade-"Cosmopolitan" labour force – opportunity for new and innovative business arising from continual influx of new employees (and new ideas) from all across Canada-Average length of residence for Cold Lake residents is gradually rising over the years-Potential for career training/re-training through Lakeland College or Lee Communications (also some University transfer courses)-Potential HATS, BSP programs would complement efforts to develop tourism and encourage the establishment of businesses locally
Weaknesses	<ul style="list-style-type: none">-Only 1/4 of the labour force that resides in Cold Lake, works in Cold Lake. This proportion has been decreasing over the last few years (was 30% in 1984).-Most occupations in the area are highly dependent on the health and vitality of only 2 major employment sectors-Proportion of total Cold Lake labour force employed in oil industry has been in recent decline; Cold Lake is becoming even more dependent on one industry (the Base).-Proportionately low labour force segment age 15-24 (Affects supply of retail/service related staff)-60% Cold Lake population has lived here less than 5 years-Range of occupations is not diversifying. As a proportion of the total labour force employed in specific economic sectors, almost all employment sectors have experienced decline, with the exception government (CFB Cold Lake).-Youth (high school age) not aware of local education opportunities-No local apprenticeship programs that could more effectively integrate Cold Lake and area youth into business and employment-Limited courses/education designed specifically for high school graduates-It is likely that the local labour force will remain primarily "2-pronged" for the immediate future. However, as a result of this dependence on two industries, one of which is not open to employment for most people (CFB Cold Lake), there are few quality job opportunities.

3.3.1 Workshop Two Participation and Community Representation

At an EDC meeting in August, 1992, it was suggested that an expansion of the number of workshop participants in Workshops Two, Three and Four would contribute constructively. This was intended to create greater community contact and awareness of the planning process, and to include key influential leaders and decision makers, both internal and external to the community, in hopes that this inclusion would generate effective strategy implementation.

A list of 35 persons was generated, representing a diverse group: seniors, youth, First Nations, FCSS, and Imperial Oil, 4 Wing Cold Lake, and Grand Centre business and municipal representatives. Letters of invitation were sent out four weeks prior to Workshop Two requesting participation in all three of the remaining workshops. Twenty-six indicated that they would participate.

3.3.2 Workshop Two: Process and Techniques Employed

Workshop Two Part I -- Situational Analysis

The Briefing Notes were presented by the Project Coordinator; they had three functions:

- To generate discussion about issues, potentials, and constraints in the community
- To consider issues from different perspectives with an aim to generate previously unthought of ideas
- To initiate discussion and gain some measure of understanding about the relationship between trends, decisions, forces, and phenomena operating in the external environment, the opportunities and threats these phenomena present, and implications of these trends on future community stability and welfare

Beginning with the internal environment, Briefing Notes were presented individually, with a short discussion period separating each one. The fourth Briefing Note, "Town Appearance", was given in a fifteen minute slide presentation. Following a supper break, the Briefing Note presentations and discussion resumed. The seventh and last - the external environment key driving forces of Oil, and Demography and Lifestyle - was presented. As this was the only Briefing Note corresponding to the external environment, workshop participants were asked to reflect on their perceptions of external environment opportunities and threats in their selection of issues and directions to take in the Strategy.

Some of the trends and forces and their opportunity and threat implications noted by the Project Coordinator included aging of the Alberta and Canadian population, the global environmental movement, shift to an information and service economy in Canada, rise of the Pacific Rim as an economic power, changing lifestyle, free trade, rapid technological change, global oil price trends, Constitutional talks, potential shifts in policy resulting from an upcoming provincial election, and provincial and federal debts.

Workshop Two Part II - Critical Issues

The general conception of strategic planning is that it is issue driven. An issue is:

- Any internal or external trend, event or development that might have impact on the community
- Any issue the community may have to respond to by an allocation of its resources
- Any issue over which the community may expect to exert some influence

(United Way, Booklet 1, 1985)

"The most common focus of strategic planning in the public sector is on decisions that must be made about issues confronting organizations...which are shaped by the value preferences of various organization decision makers." *(Bryson and Einsweiler, 1988)* An issue is strategic if it is perceived to involve a shift in the long term goals of the organization.

"Critical issues" emerge in the process of Situational Analysis (SWOT), and they describe a high-priority problem (in this sense, an issue to be resolved, not always negative): an environmental threat to which the organization (community) must respond, an environmental opportunity on which it can capitalize, an organizational competency that it can exploit, or an internal shortcoming which it must correct. Strategic issues emphasize where the organization should go, rather than on how it should get there; the "how" is determined in the action planning stage of the process -- in this project, Workshop Four. In this light, participants were provided with a definition of issues and critical issues, and how issues identification would relate to the strategy process. They were then asked to consider two frames of reference:

- Their assessment of the value and importance of data and material presented in the Situational Analysis Briefing Notes earlier in the evening
- Their prior knowledge and local wisdom about their community

Participants were organized into seven groups of three to four persons and asked to identify, as a group, a list of what they perceived to be the most important issues facing the community; these were to be issues that they felt must be addressed or resolved in order to effectively identify actions and implement a Strategy. Workshop participants were advised to write down the issue in the form of a problem that required resolving. The participants were further asked to frame issues relative to:

- The Tangibility of the Issue
- The Degree of Social Significance
- The Extent to Which the Issue is Enduring

(Cobb and Elder, 1972 in Lakeland Community Future Strategic Plan, 1992)

Groups were provided with markers and given twenty minutes to discuss and record issues on large chart paper. The whole group then re-convened and the chart paper was pinned up.

A total of fifty-eight issues were generated. A thirty minute discussion ensued, aimed at reducing the fifty-eight issues to a more manageable number. Redundancies were discarded, and issues were combined and/or amended. The fifty-eight issues were eventually pared down to twenty-six. See Figure 3-4. The twenty-six were then re-numbered in order to prioritize them. Had time permitted, the twenty-six issues may have been narrowed down even further, but workshop participants felt that this number was manageable.

The last exercise involved ranking the 26 issues from highest to least priority. The Project Coordinator explained that issues given the highest priority became the "critical issues". Workshop participants were told that lower-ranked issues might well assume higher priority in the future if there were changes to political, social, or economic conditions.

Figure 3-4 - Community Issues Identified in Workshop Two

1. Lack of identity	2. Business is complacent
3. Lack of affordable housing	4. Transient population - apathy
5. No regional concept - competition rather than cooperation	6. Lack of uniqueness as a tourist destination
7. Lack of public transportation	8. Seniors/Youth - no jobs or opportunity
9. Perceptions - lack of commerce, high taxes, poor attitudes, etc.	10. Lack of community spirit and participation
11. Lack of fish	12. Lack of common development focus
13. Lack of infrastructure (eg. commercial development)	14. Lack of military personnel involvement in community affairs
15. Town appearance - no theme	16. Poor leadership
17. Culture - lack of marketing, lack of exposure, lack of knowledge	18. No industrial or commercial incentives
19. Don't readily accept newcomers and tourists	20. Low awareness of community services and opportunities
21. Lack of promotion - both internally and externally	22. Lack of positive image - both visitors and locals
23. No clear indication of where attractions and amenities are	24. Lack of economic diversification - industry, business, tourism, recreation,
25. Closed communities - distinct cultures and perceived community differences	26. No long term vision

Each participant was given a form to prioritize issues and asked to consider three criteria:

- The Degree of Need to Resolve the Issue
- The Organization's (the EDC and the Community) Ability to Influence the Issue
- The Degree of Urgency Associated with the Issue

To infuse fun spirit, participants were asked to assume they had one-hundred dollars to spend on the issues they perceived to be of highest priority; money was to be spent on no less than four issues. The issues and dollar values assigned to them were recorded by the participants on the form provided. The Project Coordinator was aware that this type of ranking had the danger of biasing results: high dollar values could be placed on one issue alone. Workshop participants were therefore told that ranking results would be made available for Workshop Three, at which time the critical issues could be reviewed and amended if results were not satisfactory for the participant group.

3.3.3 Workshop Two: Outcomes

Figure 3-5 - "Critical Issues" -- The Top-Ranked Issues

Rank	Score	Issue
1	275	Lack of Vision/Long Term Planning -mired in habit, decision made based on historical trends, lack of committed leadership
2	265	Town Appearance -lack of architectural theme, need long term vision, lack of trees at town entrance, lack of identifiable commercial core, property maintenance not enforced
3	175	Lack of Diversification -industry, business, tourism, recreation, spousal/youth employment, few/no active entrepreneurs
4	130	Lack of Uniqueness as a Tourist Destination
5	126	Seniors/Youth -lack of transitional programming, lack of opportunity, jobs, and accommodation
6	125	Cultural -lack of marketing, lack of exposure, no regional coordination of activities/promotion
7	125	Lack of Positive Image -accommodation, services/facilities, high costs,

The dollar values assigned to the twenty-six issues were added to produce an overall group ranking. Scores very clearly indicated six priority issues that were perceived to require immediate attention in the Economic Development Strategy (*Figure 3-5*). These six were to serve as a base for the Visioning Workshop (Workshop Three) on October 24, 1992; and they would form the organizing framework of the Goals/Strategies/Actions Workshop (Workshop Four) on November 8, 1992.

3.4 STRATEGIC DIRECTION - EXPLORING POSSIBLE FUTURES

A shift from focus on situational awareness (Workshops One and Two) to a focus on strategic directions (strategies) became the substance of the remainder of the project process. This shift would require workshop participants to answer the question of how the community might respond to the critical issues identified earlier. Strategic direction involves making choices about where the community should be in future.

Successful strategic direction-setting helps ensure that the organization's mission and objectives

- Are compatible with the community's capabilities and complement its culture
- Foster commitment and cooperation among key actors
- Maximize benefits inherent in environmental opportunities (and community strengths) and minimize liabilities inherent in environmental threats (and community weaknesses)
- Enhance position relative to critical success factors -- those elements that distinguish success from failure

(United Way, Booklet 1, 1985)

Strategic direction-setting encompassed the two distinct remaining stages:

- Visioning** - a vision of what the EDC and the community ought to become. A Visioning exercise was the focus of Workshop Three, conducted October 24, 1992
- Issues Resolution** - the actions which the organization must take to achieve an identified vision and resolve critical issues (Workshop Four).

Private and public sector corporations and agencies have employed a variety of means to identify strategic direction. Two common visioning approaches to creatively setting the tone of strategic direction are the writing of scenarios (eg. Perks, 1990, Schwartz, 1991), and vision statements (eg. United Way, 1985). Many strategic planning projects skip altogether this stage of the process and move directly from Situational Analysis to Goals, Strategy and Action articulation.

"As the United Ways carry out strategic management, they find it relatively easy to take the analysis of the internal and external environment steps. However, when they go to the next step, strategic direction, they are not as certain how to proceed. As a result, they often go through this third step hurriedly and without satisfactory outcomes. Participants in the United Way process have noted that "perhaps the most important element in strategic direction is articulating a strategic vision for the organization (the community). (*United Way, Booklet 1, 1985*)

Visioning exercises are not attempts to blueprint the future; they are instead intended to encourage the beginnings of thought about the future, and to encourage participants to begin to see relationships between decisions made today, the future ramifications of those decisions, and possible alternative decisions or actions that might change the course of the future (*Steiner, 1979*). A visioning exercise can, therefore, be an effective bridge between a Situational Analysis and Goals, Strategy and Action articulation.

Should scenarios or vision statements be produced? In Sections 3.4.1 and 3.4.2 we discuss this choice.

3.4.1 The Application of Scenarios

Scenario writing exercises study trends and forces in the external environment to bring to light opportunities and threats to which the organization might or must respond. The setting of strategic direction situates the organization in direct relationship with key forces and trends that ultimately influence the community's economic status or quality of life. Organizational strengths and weaknesses are only recognized if they are seen to influence the organization's ability to respond to, or plan in the context of, external environmental conditions.

Scenarios thus propose an "outside-in" relationship between the external environment and the organization. The public sector organization must respond and adapt to external environmental conditions or, as it were, risk failure at implementing actions. Strategies and corresponding organizational structural change in the private sector are a direct response to the bottom line - profitability - which is ultimately based on a deterministic relationship between the organization's activities and external environmental forces.

In a conception of community development (our present purpose), economic livelihood and quality of life can be substituted for "profitability". Scenario writing here responds to questions of how the community might capitalize on opportunities or mitigate threats in the external environment, based on the interaction of driving forces. Perks and Macdonald (1990) propose that two or three key driving forces be forecasted into the future; the scope can be much broader, but the selection of a limited number of forces recognizes the (typically) limited community resources available for such an exercise. Community participants involved in the writing of scenarios are asked to write about a future community; and later, discuss future community decisions that respond to driving force implications. Three possible futures (positive, neutral, and pessimistic) are customarily identified.

Scenario writing can foster a greater organizational awareness and understanding of external environment forces, and how their implications can affect an organization or a community. However, the complexity and resource commitment required for effective scenario exercises are inhibiting factors that might discourage public sector adoption of scenario writing as a means of exploring strategic direction-setting. The United Way notes that scenario exercises are not often used in the private or the public sectors (*United Way, Booklet 1, 1985*), perhaps indicative of the complexity of the process and the resource commitment required.

Scenario writing undertaken with relatively inexperienced clients is premised on a possibly self-defeating assumption: that communities can only be placed in a situation of response to external influences. This not only ignores the possibility that communities, through strong development of internal capacities (i.e. organization, communication, coordination, commitment, resources, partnerships) may be able to be trend "setters"; it may prematurely limit the spectrum of opportunity from which participants can draw on for ideas. Scenario writing may therefore be more effective in situations in which an organizational vision of success and organizational capacities are developed beforehand.

3.4.2 The Application of Vision Statements

Vision Statements, as defined in this MDP, are an ideal vision of success for the organization. Vision statement exercises incorporate a critical first step often ignored by scenario writing exercises: the preparation of the organization for its environment. They are premised on an "inside

out" rather than "outside in" (i.e. scenarios) relationship between the organization and its external environment. Development of internal organizational capacities can significantly improve the organization's ability to capitalize on opportunities and minimize threats in the external environment. Theoretically, the organization's and the community's expanded organizational and motivational capacities arising from Vision Statement actions and philosophies taps the external environment in such a way that the community becomes a "trend-setter" rather than a "trend responder". Strategic direction thus becomes controlled by internal motivations and capacities rather than external forces.

Figure 3-6 - Situations In Which A Vision Statement May Have Measurable Benefit

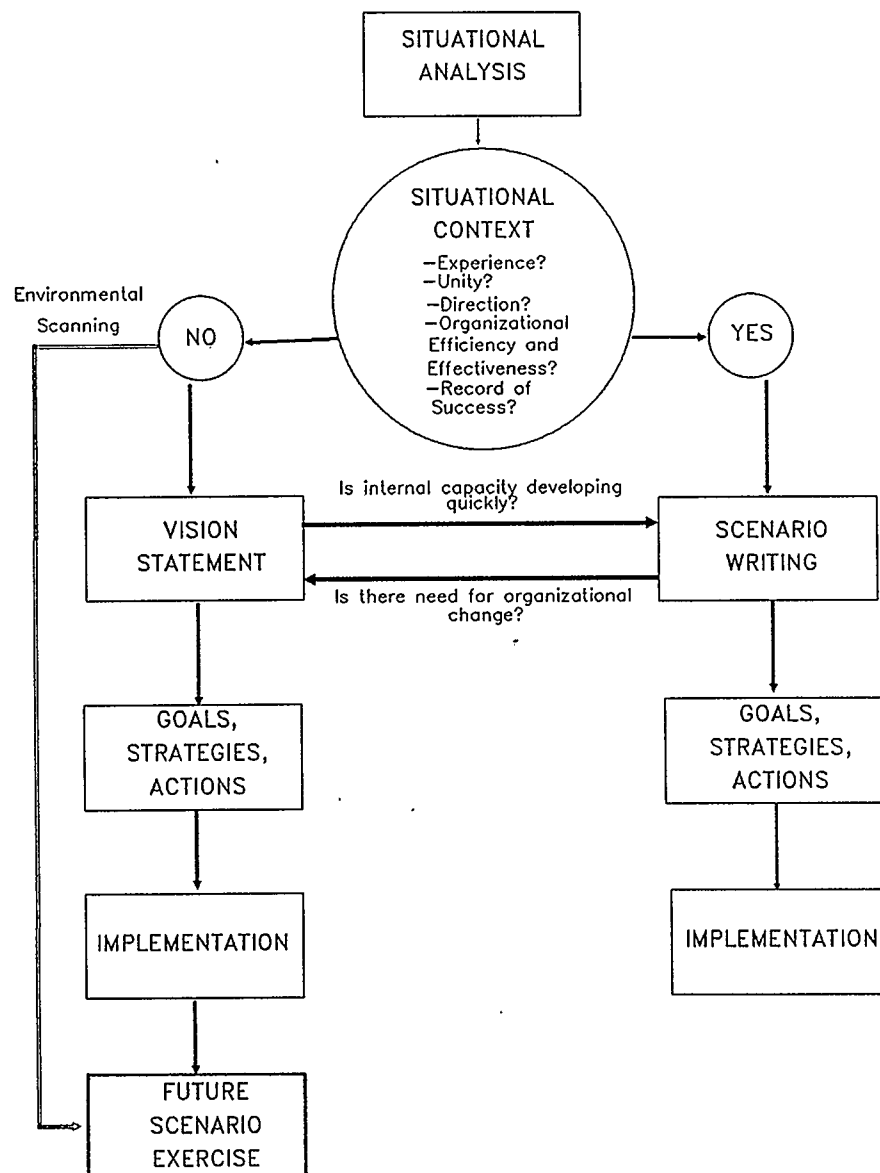
- Little or no prior experience with strategic planning
- Lack of unity in direction, or aimlessness
- Poor organizational performance which requires re-evaluation of key factors for success and re-identification of vision
- Young organizations
- An organization operating in a community context, which requires public input and agreement on strategic direction and vision to gain support and commitment
- Organizations in a very complex operating environment (eg. public sector)
- Organizations which have yet to display a sense of vision and resulting unity in their actions
- Organizations which aspire to be motivational and inspirational facilitators of change (i.e. trend-setters)
- Organizations in which there is an initial enthusiasm to "do something"

Scenarios assume that the organizational capacity to contend with the external environment is already present, efficient, well-organized with unity in direction and vision. However, in situational contexts such as Cold Lake where the internal capacity to respond to and effectively plan for environmental trends and forces is absent or not effectively developed, scenario exercises are a difficult and potentially ineffective tool to use to encourage effective strategic direction-setting. A Vision Statement exercise, on the other hand, can have measurable benefit for any one of a number of situations, a number of which were present in Cold Lake (*Figure 3-6*).

3.4.3 The Complementary Application of Scenarios and Vision Statements

A vision statement exercise creates a trade-off. While it may be effective at creating a call to action for the development of internal capacities, the exploration of relationships with the external environment is deficient. Admittedly, vision statement exercises do not comprehensively increase the client group's understanding of key driving forces and how the community can respond to key driving forces in the external environmental.

Figure 3-7- Determining Whether Vision Statements Or Scenarios Ought To Be Used In The Strategy Process



Scenario writing and vision statements are, in effect, complementary. Both are required for effective strategic planning in a rural community development environment -- but in distinct temporal stages of strategic planning activity. Scenario-writing can be a constructive exercise for organizations (communities) with a well-established direction and mandate, with prior experience in strategic and/or long range planning, and where well-developed internal capacities exist. However, in situations where there is little established organizational direction, inexperience with strategic and/or long range planning, little track record of success, and a limited project time frame and resources, a first experience with strategic planning ought to emphasize a vision of organizational success, creative thinking about possible organizational and community futures, and writing of vision statements together with a mission and mandate. How one should go from this position in the strategic planning process to Scenario writing is illustrated in Figure 3-7.

3.5 WORKSHOP THREE - VISIONING THE FUTURE

Workshop Three was conducted on October 24, 1992 in a three-hour session. The Visioning exercise used as a base of information results of the Situational Analysis, the issues and critical issues identified in Workshop Two, and participant wisdom about the community. The visioning exercise was the most critical element of the Cold Lake strategic planning process.

3.5.1 Workshop Three: Process and Techniques Employed

Attendance at Workshop Three fell to seventeen persons. The Workshop began with a presentation and distribution of the list of critical issues generated in Workshop Two. A short discussion ensued; the six top-ranked critical issues were retained.

After a presentation on the "how" and "why" of Vision Statements, three writing groups were formed. Participants were asked to "describe Cold Lake in the year 2020". The Project Coordinator described the exercise as "taking a helicopter ride over the community in the year 2020" and detailing what one saw in terms of economic activity and type of activity (retail, service, manufacturing), visual appearance, new businesses, innovative new ideas, and expected population. Participants were asked to consider all realms of community life.

To provide reference for their discussion, participants were asked to step into the year 2020, to then look back in time at how the community responded to the critical issues identified in Workshop Two. How did we as a community improve upon town appearance? Into what type of retail, service and industrial activity did we diversify? What did we do to express ourselves culturally? What types of tourism ventures did we encourage and who do we now attract to the community? What did we as a community do to make life a little easier for all residents -- particularly youth and seniors? The twenty-six issues generated in Workshop Two and the "short-listed", six critical issues were posted on the walls. Workshop participants were asked to place most of their emphasis on how to resolve the six critical issues, while allowing some, but limited, consideration of the other listed issues which they perceived as being important.

Each of the three sub-groups was asked to make simplified assumptions about the employment future of two key industries, oil and defense:

- Group 1 -- A long-term downward trend in the oil and military industries
- Group 2 -- Long term local employment stability in the oil and military industries
- Group 3 -- Long term local employment growth in the oil and military industries

Each group was provided with a computer to record ideas and articulate a vision of "Cold Lake 2020". Each included a resource person who recorded ideas and facilitated the group's discussions. The three groups spent three hours articulating their vision statement. Each group member was given a printed copy of their own vision statement as they left the meeting, and they were advised that a combined vision statement incorporating the ideas of all three groups would be produced at a later time.

3.5.2 Workshop Three: Vision Statements Produced

Three distinct Vision Statements were produced. One of them is illustrated in Figure 3-8. The ideas and thoughts about the community's future expressed in the three vision statements were subsequently meshed together by the Project Coordinator, in written form, and then presented in a Final Presentation to Town Council on December 8 (*Figure 3-11*).

Figure 3-8 - Group Three Vision Statement -- "2020"

Overview:

Looking back from the perspective of 2012, Cold Lake will have a strongly-enforced architectural theme that integrates the way the town looks and operates. Buildings will be coordinated yet diverse, and the overall effect will be to draw people into and throughout the town. The lake and the marina will have provided the unifying focus, and growing out of that theme will be an environmentally beautiful community. A "community for a healthy lifestyle" will have provided a strong focus for tourism growth. Business will be diversified, cultural activities and resources development encouraged, and the presence of internationally-renowned artists promoted and further encouraged.

An integrated and comprehensive interpretive system, based on an interpretive centre with smaller mini-centres, will encourage people to move from place to place within the community, by waling, biking, skiing, etc. A major hotel chain will be combined with small accommodation to provide places to stay.

The infrastructure needed to make all this work will include a four lane highway, more restaurants, full educational opportunities, and RV and campground facilities surrounding the town. A full-time Economic Development Officer will provide the leadership to grow even more, supported and complemented by a town administrator that has a strong background in economic development and community planning. The Economic Development Committee itself will be representative of the community through its diversity.

Business and industry will be diversified, providing multiple employment opportunities. Downtown commercial lots will be fully developed within the context of the architectural theme. Resources for community residents, particularly youth, will encourage those residents to stay here or return here. The aboriginal community will be a strong and equal component of the town's business structure, and home-based businesses will be more centralized.

Timeline:

Years

- 0 Standard architectural theme
- 0 Fitness and healthy lifestyle encouraged
- 0 Strong planning and economic development experience in new town manager
- 0 Move to be environmentally beautiful
- 0 Stronger native participation in downtown business
- 0 Home occupation businesses encouraged to centralize
- 0 Controlled development in downtown area and marina
- .5 We have an Economic Development Officer
- 1 Sitting on EDC are persons representing planning, town council, economic development, chamber of commerce, and tourism
- 1-5 Beautification of town entrance
- 2 Promote presence of internationally-renowned artists
- 3-8 Establish interpretive program
- 3 Youth/seniors programs, activities, and facilities
- 3 Trail development from Provincial Park to MD Park
- 3-8 Development of comprehensive trail system
- 5 Major tourism development and promotion
- 5 Four-lane highway from south to north Cold Lake
- 5-10 Business Incubator established
- 5 Development of full educational opportunities
- 5-10 Thriving cultural and artistic community
- 7 More restaurants
- 10 RV and campground facilities surrounding Cold Lake
- 10 Employment diversity
- 20 Presence of a major hotel chain, and fully developed commercial lots downtown

Group Three Vision Statement cont'd

Town Administration and Organization:

By 1993 the town hired a full-time Economic Development Officer, working on a joint basis with what was the town of Grand Centre and the residential portion of CFB Cold Lake (all three communities amalgamate in the short term). A permanent Economic Development Committee was comprised of members who were representative of planning, economic development, chamber of commerce, an tourism committees, plus youth and the council itself. A town manager with a strong economic development and planning background was hired, providing the leadership necessary to generate the tremendous growth we have seen over the last twenty years, and the foundation for future growth. The strategic plan developed in 1992 was fully implemented within the context of technological, ecological and community change; the foundation of success was the integration and cooperation of various facets of town administration, the business community, and volunteers.

Community Visual Theme:

The architectural policies and guidelines introduced as a result of the 1992-1993 EDC strategic planning initiative resulted in the upgraded, four-lane highway leading to a tree-lined avenue through the centre of town. Flowers provide a variety of colour, and the design draws the eye towards the lake and the marina. A vibrant commercial core provides a range of goods and services. Banners provide an additional flash of colour and action.

New buildings were automatically incorporated into the marina-lake theme, and existing buildings upgraded to integrate, as a direct result of the community buy-in, to the theme and the vision, and through incentives to encourage and make possible such changes.

Residential areas moved from the treeless and barren appearance of new developments from 1987-1992, to beautifully landscaped areas that invited people in.

All changes have been accomplished not only without destroying the natural beauty and uniqueness of the area and the lakeshore, but by enhancing it, and directly incorporating it into the theme. For example, by 1994 the blues of the lake, and greens of the trees were repeated in various architectural components such as light standards, and moving up from the lake through the town to the town entrance.

Tourism:

In addition to the visual appearance already discussed, visitors to the town are greeted by a variety of cultural, recreational, and commercial activities and opportunities. Through a program of home-based business coordination, cultural and artistic heritage strengths were integrated and enhanced and recreational opportunities developed. This increased the town's tourism tenfold, and provided business opportunities that encouraged people to stay in the area.

The combination of maintaining the high quality of natural wildlife and environment resulted in Cold Lake becoming a major eco-tourism destination. A trail system joining together various attractions leads people through the community, making those attractions readily accessible by walking, biking, skiing, and other modes of transport. Those attractions include ballparks, green areas, campgrounds, and historical sites.

Because of the tremendous growth of tourism in the community, in 2002 a major chain built a large hotel in downtown Cold Lake, providing world-class accommodation. The planning for the hotel was done within the context of the strategic plan, enhancing the vision of the future.

Interpretive System:

Based on an extensive interpretive centre built in 1996 and expanded in 1999, a comprehensive interpretive system was incorporated into the trail system mentioned above. Small interpretive "pods" provided information about cultural history - archaeological and more recent geological, natural, ecological, and industrial and commercial changes and development.

Group Three Vision Statement cont'd

Visitors can identify trees, plants, and wildlife, and learn how they have been used by various cultures over the years. The comprehensive archaeological collection from Edgar Duckett's land on Ethel Lake was, after many years of being mostly ignored, incorporated into the interpretive centre. The legends and the history of the aboriginal community are presented through paintings, stories, and other forms of media.

Social and Educational Programs:

Recognizing the lack of facilities and programs for youth in particular, the town council initiated the establishment of a youth centre. Its success was primarily due to the direct and active involvement of youth themselves in its development and operation. This meant that the needs of young people who had interests other than sports were met.

Seniors are now able to access coordinated programs, which has resulted in more seniors choosing the community as a retirement home.

We have seen a 35% increase in the number of young people staying in the community to complete their educational programs, from university, apprenticeship, technical, management, and even graduate programs. Those young people have since provided a strong and diverse workforce in the community and through the establishment of their own businesses in many cases, a catalyst for change.

Economic Growth:

Recognizing that while the oil and gas industry and military presence in the community would continue to grow, but that such growth would be far less than in the boom years of the 1980's, community leaders encouraged a wider diversity of economic development. A small business incubator was established in 1997, which has resulted in an increase in businesses of 300% over the past twenty years. Included in the new list of businesses are restaurants, a small manufacturing business, a souvenir business, an arts and crafts cooperative, an arts supply store, a health and fitness store with a complementary fitness centre, and a privately owned RV and campground facility.

Because of our promotion of our nationally and internationally-renowned visual, literary, and performing artists, a thriving artistic community evolved in the town. Today there are programs for photographers, painters, musicians, writers, dancers, and many other developing artists. In 1998 the reserve that border the town started a program of artist retreats that has attracted both beginning and well-known artists.

3.6 WORKSHOP FOUR -- GOALS, STRATEGIES, AND ACTIONS

The critical issues identified in Workshop Two and the Vision Statements produced in Workshop Three established the strategic direction. What remained was to convert a disparate set of ideas and issues into a coherent, well-rounded, rallied call to action -- to convert the "what" to the "how". If visioning is considered strategic planning's trunk, the branches attached to the trunk put action to the vision. How do we implement the direction we have identified? The shift from strategic direction to strategic plan forces the community to define the actions to be taken and the resources required. Assigning roles, responsibilities and timeframes to actions embraces and builds responsibilities and commitment, and it provides direction for day-to-day operations.

3.6.1 Workshop Four: An Account

Twenty-five persons attended Workshop Four (November 8, 1992). It began with a cursory review of Workshop Three proceedings. Participants were given handouts of each of the three Vision Statements produced, and advised that individual statements would be used by the Project Coordinator to write a "grand" vision statement that would be read to Council in a Final Presentation.

The Project Coordinator identified comprehensive and internally consistent goals and strategies to achieve for each of the six critical issues as were identified in Workshop Two. These were distributed to participants prior to Workshop Four. To encourage greater participant understanding of the process, and to maintain the continuity of their participation in previous workshops, the six goals were a reverse wording of the six critical issues. For example, the critical issue "lack of vision, leadership and long term planning" reversed became "to improve vision, leadership and long term planning".

The Project Coordinator then identified a number of strategies for each goal. For example, for "improving leadership, vision and long term planning", five proposed strategies recognized relationships between decision making bodies in the community, the importance of an effective Economic Development Committee that communicates with all other community decision making bodies, the importance of an effective municipal administration, and the link between community decision making bodies, the community, and business interests.

Participants were then split into six groups of approximately four persons each. They worked on action options for the same individual goal statements simultaneously. Each group was provided with a set of formatted worksheets, with a page for each of the strategies, corresponding to the six goals. Groups were given approximately ten minutes per goal statement to generate a list of action options.

The groups were re-convened following the brainstorming session. Starting with group one and strategy one, and rotating through the decision making groups and the various strategies, "group leaders" were asked for singular action option ideas generated. The next group was asked only for a response distinct from ideas previously mentioned. The Project Coordinator and two

workshop participants recorded each distinct action option on large presentation paper and posted them. The process continued until all action ideas were exhausted.

After a supper break, the brainstorming process was repeated, for a total of four critical issues and corresponding goal statements. The level of detail of the Action Plans created by the participant group was determined to the extent that time and personal energies in the workshop allowed.

As this was the last of the strategy workshops, it was drawn to a close by the Project Coordinator with a brief reminder about the importance of the work that had been completed. Participants were asked to consider that continued commitment, participation, cooperation, communication, and leadership and vision exhibited by the participant group would be critical to the success of the Economic Development Strategy. A plea was made to participants to continue with their leadership role in community economic development. Success would in large part rest on their ability to take the plan to the community, talk about the results, increase awareness of community economic development, and encourage community initiative in economic development initiatives.

3.6.2 Workshop Four: Outcomes

The goals and strategies, and the action plans identified for four of the six critical issues were reproduced for the Final Report. An EDC sub-committee was struck to generate action options for the remaining two, critical issues. The sub-committee also assigned responsibilities and time-frames to the action options. An excerpt from the Action Plan is shown in Figure 3-9.

3.7 THE MISSION STATEMENT

A Mission Statement is essential to the strategic planning process. It identifies the purpose of the group (organization, community). It highlights the objectives required to achieve the mission. It differentiates itself from a vision statement by expressing what the organization intends to be now, rather than the way things could be. Usually encapsulated in the form of a one-or-two sentence statement, it expresses the organization's fundamental priorities. If strategic direction and goals are the organization's tree trunk, and the actions are the organization's branches, a Mission Statement is the tree's roots.

Figure 3-9 - An Example Of An Action Plan

GOAL #1: IMPROVE LEADERSHIP, VISION, AND LONG TERM PLANNING IN THE COMMUNITY

STRATEGIES	RESPONSIBILITY	TIMEFRAME
<u>Strategy #5:</u> Encourage business and community participation and input in economic development matters		
<u>Action Steps</u>		
1. Ensure that all EDC meetings are advertised in the media prior to their occurrence, that the public be invited to attend all meetings, and that the minutes of all meetings be released to the media following EDC approval of the minutes.	EDO	Ongoing
2. Coordinate a public forum to present Economic Development Strategy Note: occurrence dependent on generation of visual images, development of arch. guidelines, and theme	EDO/EDC	Late/93-early/94
3. Initiate community-wide competitions for logo, motto, town appearance, and community development ideas and designs	EDO/EDC	1993 -Ongoing
4. Facilitate a planning/strategy workshop for businesspersons and other community people at least once a year	EDO	1994 -Ongoing
5. Create suggestion boxes that solicit ideas for specific economic development initiatives. Note: these "boxes" are intended to be distributed to businesses around town, schools, town office, etc. and involve different questions each month or several months.	EDO/EDC	Mar/93 -Ongoing
6. Encourage balanced and comprehensive media coverage of economic development activity	EDO/EDC	Ongoing
7. Invite a guest speaker in the area of economic development to Cold Lake at least once yearly	EDC	1994 start -Ongoing
8. Create and advertise a meeting calendar of town stakeholder groups (i.e. mandate, current members, meeting times, update activity reports, etc.)	EDO/Town Manager/Council	1993
9. Use the community channel to publicize community development projects	EDO/EDC	Ongoing
10. Encourage, and reward, the active participation of EDC members and other volunteers contributing to community development initiatives.	EDC	1993 start -Ongoing

Figure 3-10 - Cold Lake Economic Development Committee Mission and Mandate

As a group that ideally represents, expresses, and responds to, the desires and concerns of the community, the Economic Development Committee shall endeavour to encourage, promote, and pursue any initiative that aims to improve upon the diversity of local business and the local economy, or that contributes positively to the quality of life experienced by Cold Lake residents. As community supporters, community ambassadors, and facilitators of positive change, our efforts at all times will include everyone interested, and perhaps most importantly, reflect a deep sense of community pride and commitment to community.

Mandate

To effect change in a creative, constructive manner, and to ensure the Committee's activities have a positive impact long into the future, our mandate is as follows:

1. To foster community pride and commitment through leadership, vision, and long range planning
2. To initiate, promote, and support, efforts to improve town appearance
3. To encourage the establishment of new economic activities or industries that diversify the employment base.
4. To promote existing retail and service businesses and encourage the establishment of new, complementary businesses.
5. To encourage further development, and improvement upon, the existing tourism infrastructure, services and attractions in a manner that creates a "unique" tourism environment
6. To support any efforts to aim to improve upon the quality of life experienced by local residents, including youth and seniors
7. To encourage expression of our past and present cultural life
8. To improve the visibility of Cold Lake on a regional, provincial, national, and international scale for both potential business and tourism markets
9. To encourage and actively promote greater cooperation and partnership among and between ourselves, and other communities in the region
10. To develop and implement an Economic Development Strategy

A Mission Statement was written by the Project Coordinator after completion of Workshop Four (Figure 3-10). While the Mission Statement described the EDC's raison d'etre, the mandate articulated the goals the EDC would be actively pursuing. The mission statement was reviewed and accepted with minor modification by the EDC in December.

3.8 THE FINAL PRESENTATION TO COUNCIL

Rather than accept fatalistic or deterministic stances, which can be manifested in reactive, non-policy approaches to decision making, the Cold Lake visioning exercise and the Vision Statement articulated a belief that the community could be a trend-setter. The primary condition was the ability to develop community capacities and its force upon proactive policies and attitudes.

"Essentially, strategic planning seeks to make a fit between the Organization (i.e. the Internal Environment/Community) and its External Environment (the world). The fit will be made somewhere along a continuum defined by adaptive pragmatism ("fatalism", "determinism") at one end, and by normative pro-activism ("opportunism", "future history") at the other. Positioning on this continuum will depend on how the organization perceives its capacities to exploit its strengths and to marshall resources for achieving new goals that suggest themselves from opportunities seen to be "out there". (*Perks and Kawun, 1986*)

The October, 1992 election of a Town Council with many new faces, presented an obstacle. Council was relatively unaware of the project. On the other hand, the new Council presented an opportunity to capture their imagination, and secure commitment and enthusiasm to community economic development initiatives. The Project Coordinator sensed in the later stages of the project that the process had created discussion and some degree of consensus about the communities' potentials and possibilities. But discussions had failed to grab the imagination of a majority of workshop participants (and other community leaders). Thus, a unique and creative presentation of the Workshop Three Vision Statements could be an effective vehicle for providing a sense of hope and inspiration. Rather than present to Council a series of recommendations alone, the Vision Statement was used to surprise decision makers, and to provide a starting point from which change could take place - in both attitudes and the physical environment. The Vision Statement aimed to expound a new development philosophy for the community.

The presentation to Council began with a brief summary of the strategic planning process and the workshops conducted to date. Council was informed of the process which was conducted to produce the three individual vision statements and the aggregated "Footsteps of the Future" Vision Statement. Council was told that the Vision Statement was only one possible future. Council was told that the purpose of the Vision Statement was merely to encourage thought and discussion about the future, and to create greater awareness.

The Presentation on December 8, 1992

The lights of the Council Chamber were extinguished to create an atmosphere that focussed on the words, the images, and the vision. Classical, nature-themed music began to play softly in the background. Reading by flashlight at the back of the Chamber behind everyone in the room, the first of the three readers, "The Teenager, Patty" began to describe her experience of arriving in

Cold Lake. She was visiting for the first time her aunt and uncle in the year 2020. Her story of a favourable first impression of Cold Lake was followed by the thoughts of the second reader, "Aunt Betty". She resided in Cold Lake 2020. Aunt Betty thought about all that could be seen and done in Cold Lake 2020, and wondered where to begin first. Thoughts then turned to the third reader, "Uncle Bob". He reflected with great satisfaction on all that he had seen accomplished in the years 1990-2020. Uncle Bob eloquently thought about the legacy left by a succession of proactive, committed community leaders and decision makers who had dreamed, visioned.

Figure 3-11 - Cold Lake Vision 2020 -- "Footsteps Of The Future"

PATTY

We've never been here before, but my parents have dragged me here to visit Aunt Betty and Uncle Bob. They've lived in Cold Lake a long time. My parents have heard so much about how beautiful and vibrant Cold Lake has become. So here we are sitting in a tattered old 2010 Aerowagon staring blankly out the windows at a summer heat wave. We're only miles from the former Town of Cold Lake, but little is inspiring my imagination. I'm a bored teen with a self-diagnosed rebellious streak and a bad attitude, hoping my misery ends soon.

But alas, a spark of interest in my neutral day. Just to my right -- is a green area of mixed trees, rolling hills, and open space. "Imperial Park", its called -- reminds me of one of those huge city parks like Hawrelak or Prince's Island Park that are a focal point for the community socially and culturally . We're to meet my aunt and uncle here for a picnic. Sky so richly blue, the vivid fragrancly of wildflowers, fresh cut grass, the forested horizon a backdrop to rolling hills, and so many people out suntanning, playing sports, or having picnics. Not bad, not bad at all -- a beehive of summer fun. I could handle this. There's a large indoor recreation centre here, an outdoor amphitheatre for festivals, ranging from Art-in-the-Park, to Aqua Days, to Music festivals, picnic grounds, guys, barbecue pits, guys, playing fields, guys, and hiking trails that wind through the trees and hills -- there's even a trail that goes all the way to the "Heritage Museum", which I've heard is fondly called the "Golf Ball Shrine", or the other way right to the lake itself. I've even managed to rent a mountain bike here and made it to the museum and looked around at all the old planes and artifacts. Someone's painted beautiful murals on the sides of the buildings.

Okay, so now I'm somewhat interested in what else there is to see and do here. But for my parents sake I register a blank look on my face. The key is to look like I'm not having a good time. Back in the car on the twinned highway, we whiz by Highway 55. Someone has taken a lot of time and care to make this area attractive. "Welcome to Cold Lake Marina District", says the large, pleasant, marina blue sign surrounded by wildflowers, shrubs and planted trees. Odd, but that's neat!! - blue highway shoulders, and blue lightpoles seem to point a finger to what lies ahead. I'm hooked - the line is being drawn in to the top of the hill.

Berry bushes and shrubs with bird houses nestled within are everywhere along both sides of the road from here all the way to the top of the hill. Thousands of birds I can almost touch - through closed windows I can virtually hear the "thwap, thwap" of ten thousand wings and the crescendo of frenzied chirping.

The top of the hill, and a turnoff for visitor information into a small, landscaped parking lot. The view over the town and across the lake is panoramic, exploding in a kaleidoscope of colours, shapes, and textures. Beautiful landmarks attract my eye - especially a clock tower, lighthouse, and totem poles down towards the marina. What other surprises remain for me to discover?

Vision 2020 -- cont'd

This place has the most unique tourist information booth I've seen in my travels through Alberta - a large lighthouse. Tourist info is on the main floor, and not afraid of heights, I venture to the second floor observation tower to snap a few pics of the great view. This thing is a museum in itself. The lighthouse exterior is painted with murals depicting the natural and cultural history of the area, and the interior is a collage of historic pictures and artifacts, and local artwork. I learn that this lighthouse describes pre-history and the land of untamed wild. The story begins with the lush tropical forest, gradually moving into the ice age - huge glaciers carving out the land - that formed the lakes giving us our name. Toward the top, are the first peoples that came from the south following the retreat of the glaciers - the first people to know the natural beauty that still surrounds us. Walk inside to touch and feel the projectile points and spearheads these first peoples fashioned from materials in the natural environment - a physical connection through 10000 years of human history.

I can tell already that these people have deep pride in their community by their concern for the small things. All around the lighthouse and the parking lot are wildflowers and native trees and shrubs. With the pure smell of air and nature in my nose, the warmth of the sun's rays on my back, the vast deep blue of water beyond and the forested foreground of buildings whose colours seem to match the environment that surrounds, I could curl up on the picnic table in the small grass area here forever and read a book or just stare and daydream.

Back in the car and passing the Mac's Store, though I'm no longer interested in being in the car, two abstract, blue, sails stand as sentinels on either side of the road, their metal masts aimed as though they are pointing to the marina area and two totem at the end of the road. But as quick as we arrive, we turn in the direction of my aunt and uncle's in some place called Nelson Heights.

AUNT BETTY

I've so much to show Patty, so much to see and do. I was born and raised in Cold Lake, and over the years, I've seen Cold Lake grow and blossom into a sparkling jewel that is unique, exciting, and alive with energy. This road into town - a painted canvas of intricate beauty. Splitting the twinned road at the central point of the canvas, a canopy of trees form a welcoming gateway. Bannered lightpoles, street furniture, and road shoulders pick up the blue of the marina. Wild flowers and careful landscaping splash vibrant colour across the coolness of blues and the greens. Houses and shops sheltered by trees and shrubs form the left edge - incorporating the blues and greens of the environment, a trucking transport building sports a mural of wildlife. On the right - the educational centre of the region, with Lakeland College, an Asian College, and a military college across the road from Mac's. The Cultural Centre below Lakeland College contains, among other things, an indoor theatre that is used for frequent plays, concerts, and special events. Trees and shrubs screen less appealing elements, and add beauty to the canvas.

The Cold Lake Marina District's central park beside the old Town Office is haven to old and young alike basking in the sun on benches around the clock tower. Toddlers splash at the water of the fish pond surrounding the tower, delighting in the golden flash of fish below. I remember how people laughed at that idea - said it was too expensive and couldn't be done. Volunteer sweat and inventiveness showed the pundits wrong. Just look at it - non-stop activity year round in "Harbour Park" - the fish pond an ice rink in winter where people skate to the high, clear sound of the tower's carillon bells ringing in the new year. We always ring those bells on special days -Canada's Birthday, New Year's, and "Cold Lake Day", the day council long ago signed the proclamation that began turning our dream into reality.

There's the walk up 10th street, past the seniors housing complex. Trees planted in the 1990's by volunteers that believed in the dream wear the darker green of maturity, spreading a welcoming shade. Front yards, too, are part of the dream, each distinct and unique, drawing us through the harmonious canvas to the white United Church at the top of the hill that's been there for almost 100 years. I remember my parents telling stories of Dr. Margaret Savage delivering sermons, babies, and sheep. In the background, an intriguing mural covers two walls of the water treatment building.

Vision 2020 -- cont'd

Over the brow of the hill you can see the second lighthouse. That's where the old hospital used to be many years ago. The "Lighthouse Restaurant" is there now, the logs of its walls blending with the wood of the lighthouse that forms its northern side at the edge of the bluff. Specializing in seafood, people come from miles around to sample the restaurant's specialties - Whitefish, Lake Trout, and Kokanee Salmon. Spiralling around this lighthouse is a living mural of our history since history was written down. The first Europeans, William Pink, who wrote about us in his diaries, Peter Pond, the explorers, the voyageurs, the missions, and the people who welcomed them - Big Bear, Poundmaker, the Beaver Indians, the Crees, the Chipwyans.

At the foot of the lighthouse, wooden footsteps lead you down to the rocky shore and Lakeshore trail, which now extends right around the lake. Out in the lake - "The Kinosoo" - a nature cruise by day, casino and dancing by night. A mile and a half along the trail is "Harbourfront" - the focal point of the community - the centre of our dream. Across the road from the trail is Harbour House - the start of it all, and inspiration to create something unique.

You can walk along the marina boardwalk, watching intently the hubbub of activity as fishers and sailors prepare to leave. Between the totem poles lies the sign signalling arrival at a "unique" place of unparalleled atmosphere. Nicknamed "The Stroll" by local merchants, the wood-carved sign indicates that the visitor has arrived at "Harbourfront". Lakeshore Drive has been completely filled in over the years, and is Alberta unique. The colours of the predominantly two-storey buildings are vibrant, natural, and invigorating. Each is unique, yet similar. Most buildings have awnings, large pedestrian-oriented windows, wood engraved, marina-blue signs, and incorporate the vibrant colours of our environment - blues, greens, reds, oranges. Many buildings constructed since 1994 also have pitched roofs and turrets, and some have porches.

There are two "living shops" here where people can see what is being created - a woodworker and a candy maker. Other shops include restaurants, a bait and tackle store, marina sales and repair, a Victorian bed and breakfast, arts and crafts supply and sales, a fitness gym, health food store, and sewing and fabric store. One building on the waterfront has a second floor, marina-themed restaurant. You can wine and dine amid the nets, tackle gear, crates, and artifacts that contribute to the Harbourfront atmosphere. Your experience is heightened by the glass windows that surrounding, providing a bird's eye view of the Cold Lake horizon.

Another building on the waterfront has a second floor pub. Visitors and locals can drink and dance the night away, with the panorama of Cold Lake a beautiful backdrop. the pub has encouraged local culture and arts by displaying local art work and products, and by varying the entertainment offered. On Fridays, local folk singers, with guitar in hand entertain. Among other special event evenings are a jazz night, an improv night, a local talent night, and even a German pub night for the older folks around town who long for the good old days of mile high beer mugs and German frauleins.

The old Tourist Information A-Frame has been moved to a new location downtown donated to the arts and crafts community, and has become a focal point of activity - where anyone interested can become involved, practice, and even sell what is produced. Up where the old A-Frame used to be stands the third lighthouse. Here is the history of the last 100 years - the fishers, the trappers, the hunters, the ox team yoke ready for the day-long trip to Grand Centre, LeGoff school, changes to Native lifestyle, the coming of the military, the oil boom that Peter Pond foresaw many years ago . I wonder where the next lighthouse will be, and what it will record?

We have industry in Cold Lake in the industrial park out by the hospital, that is a popular attraction for both locals and tourists - locally because the industry we have is environmentally friendly, and to tourists because the "green-clean" theme attracts those wishing to take tours of the operations. These businesses include a biodegradable soap manufacturer, a recycled paper pencil manufacturer, a Cold Lake flavoured bottled water producer, small scale recycler and glass crusher, a greenhouse, and even an aquaculture facility that has taken advantage of a growing Alberta urban market due to increasing numbers of Asian immigrants.

Vision 2020 -- cont'd

Cold Lake Provincial Park has expanded and is a destination for locals and visitors. There is also a four season resort on French Bay, complete with a first class 18 hole golf course and conference facilities. The resort attracts foreign tourists, complementing the regional, provincial, and national tourists that Cold Lake is attracting.

UNCLE BOB

How do I tell Patty how proud her uncle, and all the residents here, are of this place? The youngsters here get quite a kick out of the 100 years of pictures we have, especially all the changes in the last thirty. The oldtimers get reflective – they take such great pride in our achievements. But it's hard to put into words just how much human spirit and volunteer sweat was spent on this now thirty-year old dream. Like the difficult times of those bygone homesteading days, we built our vision in the pioneer spirit – a community of hands and labour building what was said to be too expensive or not possible – the clock tower, lighthouses, trails, buildings, landscaping. The rest of what is here? Well it became because community leaders, and eventually the entire community, took our vision to entrepreneurs, investors, and those willing to gamble on a dream.

I don't ever want to leave this place of tranquility. There is a variety of employment options available outside the military and oil industry now - so much different than a generation ago. This place is alive and thriving with a cultural and linguistic mix of military people, oil employees, and increasing numbers of artists, musicians, and poets who find inspiration here, people who move here to enjoy our relaxed lifestyle, and entrepreneurs who are now reaping the dividends of their time and efforts, and commitment to a unified vision. We have become a water wilderness playground.

Cold Lake is a place of lifestyle and opportunity. New businesses and services established over the last 30 years, new attractions, amalgamation, community effort and pride, and the range of events and activities coordinated by various organizations has stabilized property taxes, encouraged increased local spending by local people, drawn many more tourists here to visit, and return, and has built a strong reputation as a place of friendliness, beauty, wilderness, and amenity. We are now known as the beginning, not the end of the road.

Many, many years ago, town leaders committed to a vision of an economically diversified leisure community of unparalleled attractiveness. They had a vision of an environmentally beautiful and responsible community in which business could thrive. They identified green, high tech, and cottage industry, high end retail businesses, local and tourist amenity retail and service businesses, the flourishing expression of our cultural past and present, architecturally themed development, town beautification, and unique tourism development initiatives, as key strategies needed to achieve this vision. Most importantly, they believed that achievement of their vision rested on the ability to include everyone, and develop and reflect our pride in, and commitment to, the community.

Oh, there were tough times initially – coordination and communication problems, pessimists, those finding problems, not solutions. I remember them well, and I must say that I had my doubts about some dream being applied to the "real world". It took a lot of effort to get everybody working towards the same goals, but we had leaders who inspired us with a dream, engaged our imaginations, and challenged our minds and spirit. They believed that survival and prosperity rested on the ability to become masters of destiny, not victims of fate. Slowly, we began to work together in harmony - and eventually we had a small army of volunteers, idea generators, and entrepreneurs, willing change with our hearts, our minds, and our hands.

And as I sit on the cushioning, bleached beach watching a fiery red globe settle beneath the horizon, listening to the slow roll and gently washing, lapping sound of the waves reaching shore, and the melancholy song of the loon, I remember the words of 30 years ago -an initial contributor to the creation of a vision, quoting the bible, who said:

Our eyes have not seen
Our ears heard
Or our minds imagined
What we can build

With eyes casting glances at all that has been accomplished over 30 years, our eyes have indeed seen, our ears heard, and our minds imagined, what we can build.

Chapter 4

POST-PROJECT EVALUATION BY THE PARTICIPANTS

"The Road to Wisdom"

*Err
and err
and err again
but less
and less
and less*

Piet Hein

This Chapter offers an evaluation of planning effectiveness in the Cold Lake project. Rather than measure effectiveness from the viewpoint of the project facilitator alone, an evaluation survey was distributed to the client group, the process participants, and the key stakeholders following completion of the project. The survey findings form the basis of measurement. In Chapter 5, we further reflect on the conducting of community-based strategic planning in new or fresh planning contexts; and some conclusions are drawn about the future success of strategic planning and the Economic Development Strategy in Cold Lake.

4.1 AN OPINION SURVEY OF THE COLD LAKE ECONOMIC DEVELOPMENT STRATEGY AND STRATEGIC PLANNING

A survey was issued to twenty-six participants and community stakeholders four months after the Economic Development Strategy project was completed. The respondents included five of the seven members of the newly-elected Council, seven of the eight EDC members, and six community-at-large persons who attended one or more of the project workshops. Eighteen responses were obtained, representing a response rate of 70% (See *Appendix B for survey questionnaire*).

4.1.1 The Planning Process

The respondents appear to be satisfied with the workshops and other activities that comprised the strategic planning process. With the exception of one or two individuals, all respondents were satisfied that the workshops stimulated thought and achieved results. While opinion was split on

Workshop Two (Situational Analysis) and Workshop Three (Visioning) as being "very effective" or "somewhat effective", seven of twelve respondents felt that Workshop Four (Goals/Strategies/Actions) was "very effective". The increased satisfaction with Workshop Four might be attributed to a greater, late-project understanding of how all components of the process fit into a real world plan of action. Only one respondent rated Workshop Three as "not very effective", and two respondents rated Workshop Four as "not very effective"; their comments point to dissatisfaction with the actions proposed in the Strategy and a failure to focus in detail on the business community.

Corresponding to satisfaction with the workshops, respondents were relatively satisfied with all elements of the process, including project timing and time span, materials produced for the workshops, project and workshop objectives, the diversity of persons participating, and the effectiveness of their own participation.

Respondents, on average, tended to be "very satisfied" with the following:

- Number of workshops they had to attend
- Time span of their participation in the workshops
- Slide presentation on town appearance
- The process was interesting to participate in -- i.e. "not routine"
- The process allowed respondents to participate effectively

Respondents, on average, were "somewhat" or "very" satisfied with the following:

- Length of time taken to complete workshops
- Time span of the project
- Leadership and project management by the Project Coordinator
- Project objectives were clear
- Objectives set for workshops were achieved
- Briefing Notes for the Situational Analysis
- Workshops involved the right people, with good effect

Only a small minority of respondents were "somewhat" or "very" dissatisfied with any elements of the process. Three respondents were somewhat dissatisfied with the length of time taken to

complete workshops; and two respondents were "somewhat dissatisfied" with, respectively, the clarity of project objectives, the degree to which the process was interesting to participate in, and the degree to which the process allowed them to participate effectively.

Asked for additional comments, one respondent pointed to the efficiency and thoroughness of strategic planning. Other comments (which indicated areas to improve upon) identified the project's time span as being too short, the workshops too pressed for time, lack of same-participant continuity throughout the process, departure of the Project Coordinator before implementation could occur, conflict with the municipal election period, perceived participant uncertainty over the purpose, value and process of Workshop Three (Visioning), and a lack of participant experience with the process.

One respondent felt that a strategic planning process of significant scope is too difficult for one person to run. Another felt that the arrangement of participants into sub-groups given specific tasks to achieve might have made the process more effective. Others cited some needed refinement of verbal and written communications between the Project Coordinator and the participant group.

The project time frame -- three of the six-month project period that spanned the summer months and an October municipal election -- and the Project Coordinator's departure following completion of the project were factors that could not be obviated or controlled. These constraints had the combined effect of reducing to some degree the effectiveness of workshop proceedings and the results. The Project Coordinator attempted to alter the process to accommodate factors that could be controlled; for example, workshop invitees were asked to commit themselves only if they could attend all three workshops. Other considerations included the adjustment of workshop dates, careful selection of the participant-group, and the production of user-friendly research and background materials.

4.1.2 The Planning Products

A number of outputs or products of the planning process were evaluated by the survey: the Vision Statement; Identified Goals, Strategies, and Actions; Community Benefits, and the strategy's influence on the EDC and Council.

The Vision Statement -- "Footsteps of the Future"

Survey respondents expressed pronounced satisfaction with the Vision Statement and its usefulness for the decision making process: thirteen of seventeen respondents "strongly agree" that the Vision Statement will be useful in guiding future decisions made by the EDC; nine of seventeen "strongly agree" that it will be useful in guiding decisions made by Town Council; and sixteen of eighteen respondents either "strongly agree" or "somewhat agree" the Vision Statement is a strong motivator for the community to achieve development strategy goals (Figures 4-1 and 4-2).

Figure 4-1 - The Vision Statement Will Be Useful in Guiding Future Decisions Made By The Economic Development Committee

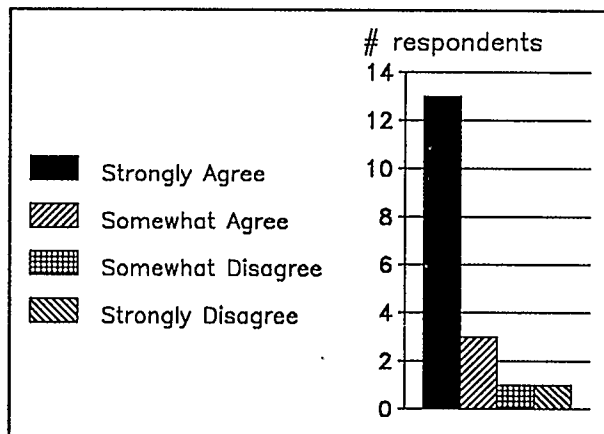
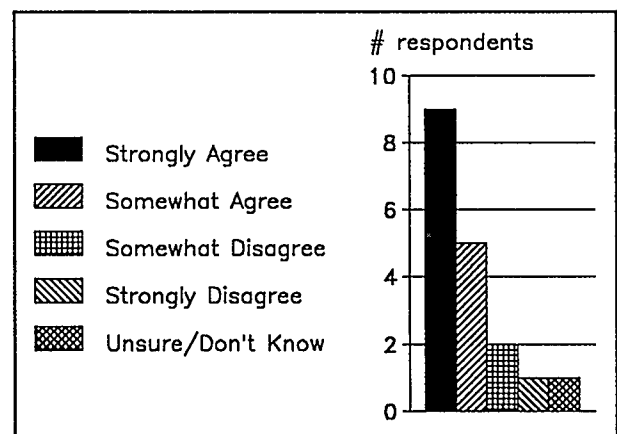


Figure 4-2 - The Vision Statement Will Be Useful In Guiding Future Decisions Made By Town Council



The respondents were unanimously satisfied that the Visioning exercise served a useful purpose in the process; and they were likewise satisfied with the unconventional manner in which the Vision Statement was presented. Twelve of the eighteen respondents "strongly agree" and the remaining six "somewhat agree" that the Visioning exercise was a good way of exploring the future. All agree that having a Vision Statement serves a useful purpose in the overall planning task. Half of the respondents "strongly agree" and all but one respondent at least "somewhat agree" that the creativity and imagination in the presentation of the Vision Statement will help generate community involvement and commitment.

Since the Vision Statement was written by the Project Coordinator, it was important to determine whether it accurately encapsulated the participants' thoughts and ideas. Eleven out of fifteen respondents "strongly agree" that the Vision Statement encompassed most of the ideas and opinions expressed by participants in the workshops. Only one respondent disagreed.

On the other hand, a significant number of respondents perceived some deficiency or other in the Vision Statement's realism, and in identifying how the community is to respond to external trends and influences. Three respondents "somewhat disagree" and eight "strongly disagree" that the Vision Statement is not realistic enough (i.e. the goals were set too high); six others "somewhat agree" and one respondent "strongly agrees" that the statement is not realistic enough. A good majority of respondents (14) "somewhat" or "strongly agree" that there was not enough said in the Vision Statement about how Cold Lake ought to respond to forces and events in the world outside Cold Lake (*Figure 4-3*).

It is important to note that the Vision Statement's purpose is to produce ideas and a "utopia" to aim for; in this sense, it may never be "realistic". The lack of better reference to the forces, etc. in the external environment is an acknowledged deficiency; the author had reasoned, however, that this was a necessary deficiency because the client group had not had previous experience with SP, the client group has not yet established the internal capacity to be a cohesive decision making unit, and the decision making environment in the community was perceived to be in need of a motivational tool to organize in preparation for planning with and for the external environment.

The 'external environment deficiency' could conceivably be remedied with the continuation of a strategic planning process beyond the project end date: the Economic Development Strategy identifies continuous environmental scanning as a necessary action step; and it was suggested to the EDC prior to completion of the project that a scenario-writing exercise might be considered to fill in the acknowledged gap, with the product of this exercise eventually being incorporated into the Strategy.

Goals/Strategies/Actions Identified in the Economic Development Strategy

Survey respondents almost unanimously express satisfaction with the directions and actions identified in the Economic Development Strategy. Sixteen of eighteen respondents agree that the

decision making group correctly identified the issues the community must address to grow and prosper (Figure 4-4).

Figure 4-3 - There Was not Enough Talk About How We Respond To Forces And Events In The World Outside Cold Lake

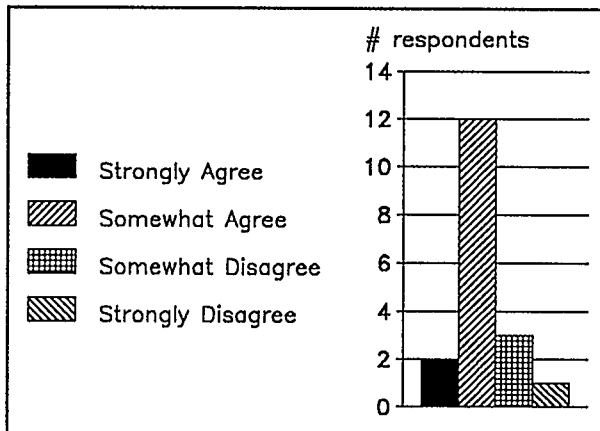
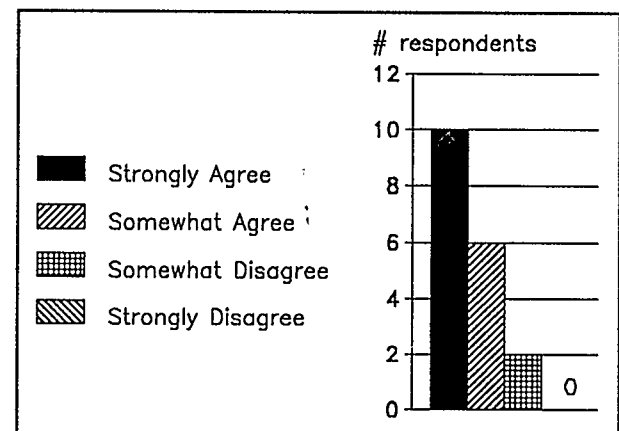


Figure 4-4 - We Correctly Identified The Issues The Community Must Address To Grow And Prosper



With the exception of two respondents who disagree, all survey respondents "somewhat" or "strongly agree" that the decision making group identified the right set of actions to take in resolving issues and achieving Economic Development Strategy goals (Figure 4-5). However, the proportion who strongly agree that the right actions are identified is smaller than the proportion who strongly agree that the right issues are addressed. This result might be attributed to Workshop Four time constraints and the pressure then to develop ideas quickly, at the expense of thoroughness. Identification of more refined actions will occur, it should be expected, with continued refinement of the Strategy, and with feedback from an informed public forum.

Community Benefits

The survey recipients were asked to respond to several statements about the planning project's benefits to the community. Responses are convincingly positive. Seventeen of the eighteen survey respondents agree that the planning process fostered a sense of excitement about the future. Fifteen of the eighteen agree that the planning process generated useful new thought and discussion about the community for most or all of the workshop participants. Only three respondents were "unsure" or "didn't know".

However, when the same statement was extended to a community-wide context, responses were somewhat less positive (*Figure 4-6*). While eight agree (seven "somewhat") that useful new thought and discussion was provoked in the community at large, seven disagree (six "somewhat"). Responses to this statement might have been more favourable had an originally-intended public forum been held.

Figure 4-5 - We Identified The Right Set Of Actions To Take

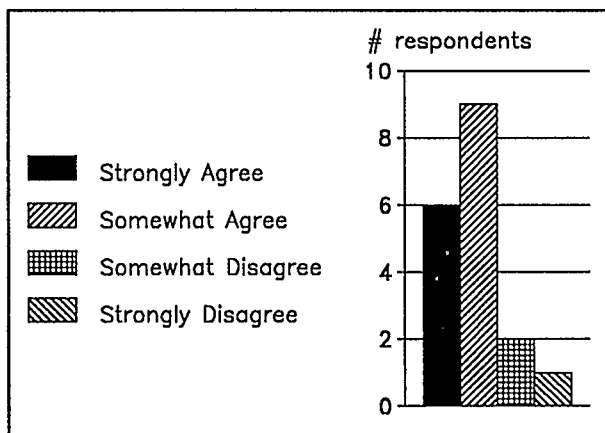
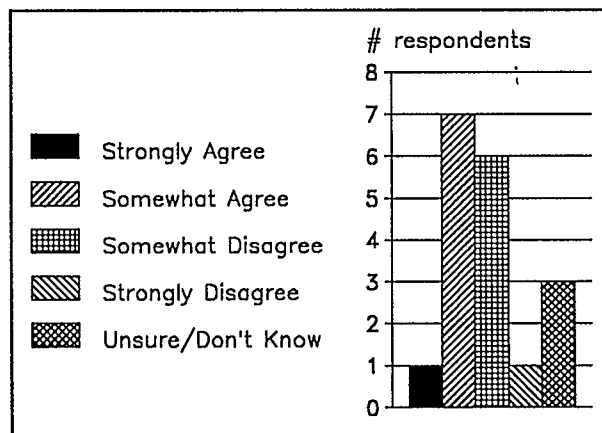


Figure 4-6 - The Planning Process Provoked Useful New Thought And Discussion About The Future Of The Community In The Community At Large



All eighteen respondents agree that the planning process opened many minds to new opportunities; although fourteen of the eighteen only "somewhat" agree. All eighteen respondents also agree that the Economic Development Strategy will foster and strengthen community interest and commitment to community economic development; although again, the majority of agreement is relatively weak. Weak responses might be attributed to the short project implementation period prior to distribution of the survey.

The respondents perceive that the Strategy will bring moderate to significant results to the community in the future (*Figure 4-7*). All those responding to a question which asked how effective the Strategy would be at bringing results to the community felt that it would be "very" or "somewhat" effective; no respondents indicated that "it wouldn't change anything", or "it has made things worse".

The Economic Development Committee and Town Council

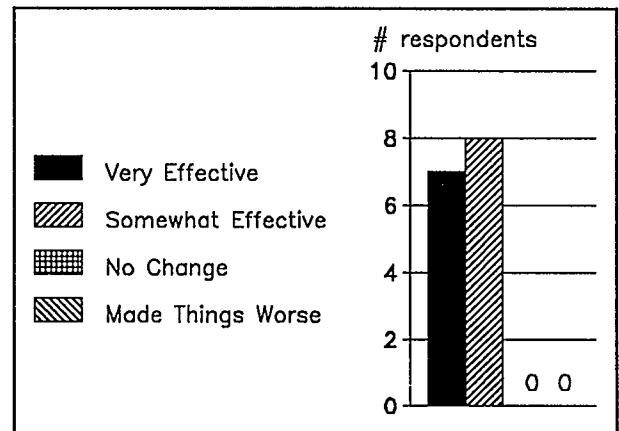
A key factor influencing the effectiveness of strategic planning in Cold Lake and implementation of the Strategy was the degree of buy-in from the EDC and Town Council. Respondents' perceptions, including those of Council and, the EDC, are more or less agreed this occurred. Eleven of seventeen respondents agree that the strategic planning process improved the decision making ability of the EDC; however, only one "strongly agrees", while five are "unsure" or "don't know". Did the project improve the EDC's ability to take a leadership role in the community? Ten of the seventeen respondents agree that it did improve the EDC's leadership capacities. EDC members' opinions accord with those of the others.

Two further questions gauged whether strategic planning and the Strategy itself are having the effect of extending beyond the EDC to exert influence on the larger municipal decision making structure. Fourteen of seventeen

respondents agree that the process and the Strategy have given a new sense of direction to community decision makers. There is no significant distinction in response between the EDC, Council, or other respondents. Seventeen of eighteen respondents agree that the Strategy will produce greater communication and collaboration between Council, town management, and the "public"; seven respondents "strongly agree" on this.

The short period of three months between project completion and distribution of the opinion survey might possibly explain the relatively weak level of agreement in this area of evaluation. One respondent commented that it is yet too soon to adequately judge the Strategy's effectiveness at producing commitment, communication, and leadership in the municipal decision making structure. Informal community feedback obtained by the author following project completion may provide a further explanation of tentative, yet positive opinions. Comments cite continuing conflict in the EDC, the status of a future Economic Development Officer position, and a Council review of the

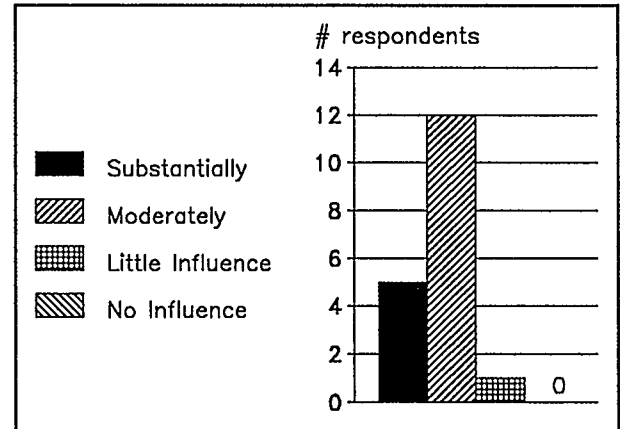
Figure 4-7 - Will The Economic Development Strategy Be Effective In Bringing Results To The Community?



town management structure as unresolved issues. A significant number of respondents did not provide an opinion about many of the statements in this area of evaluation -- for eg. Town Council has accepted SP as a beneficial activity that should be continued, or the Strategy has given a new sense of direction to community decision makers. This result might normally be expected because the majority of the respondents with no opinion do not sit on Town Council or the EDC.

But the survey respondents did have opinions regarding how the thoughts and ideas expressed in the Strategy and the process in general would influence future Council decisions. A majority felt the Economic Development Strategy would have moderate to substantial influence (*Figure 4-8*).

Figure 4-8 - How Will The Thoughts And Ideas Expressed In The Strategy, And Strategic Planning In General, Influence Future Council Decisions?



4.1.3 Suggested Improvements To Either The Process Or The Product

The participants were asked to look back at the workshops and think about what they ended up producing and whether the process and/or the end product could have been better. Results were split: with seven respondents indicated that the process and/or product could have been improved; eight indicated that no improvements could have been made. They offered these suggestions:

-Process

- Larger representation from business
- More time allotted to individual workshops
- Involve a broader cross-section of the community
- Control bias of strong voices heard to the detriment of others'
- Communicate ideas to the community to achieve wider consensus

-Product

- Indicate a clear call to action for Council
- Tap military presence for new business ventures
- Get better buy-in from other town committees/ community groups
- Include new community "players" in the process.
- Expand participation beyond persons already participating heavily in community affairs

4.1.4 Key Indicators of Effectiveness

Strategic planning is a learning process. It continually involves new discovery about the community and the external environment. Increased exposure to strategic principles should result in modifications to the process; modifications will move new discoveries to strategic direction and actions that add to and improve the plan and decision making. It follows that measuring the effectiveness of strategic planning in the Cold Lake context ought not to rely exclusively on "results". Effectiveness ought to be determined as well by the "process" by which results were achieved, and achievements over time recorded by a continued application of the strategic process. The effectiveness of the process can be gauged from two perspectives: -its contribution to the community; and -a personal or psychological impact on the participants. Accordingly, five scenarios were posited by the author, and evaluated based on survey findings.

Scenario One - "Strategic Planning: A Better Method of Planning?"

If, at its best, there was any expressed dissatisfaction with elements of the strategic planning process and the product, but "strategic planning" was felt to be a better form of decision making than that currently being used, then the strategic process could be said to be effective. This would imply that dissatisfactions with the process were not pointing exclusively to its application in concept, but to controllable factors in design and execution of the process. These controllable factors would include, for example, the abilities of the Project Coordinator, the client group's and participants' experience with strategic planning, the quality of information gathering, formatting, and presentation, time-span of project, or first run-through deficiencies attributed to the dominance of a selected few workshop participants.

The survey recipients were asked to compare the strategic planning process with past decision making methods and planning in Cold Lake according to a number of indicators or "measures" (below). With the exception of one respondent who felt strategic planning is more or less the same as past town decision making methods, in all of the indicators all survey respondents feel that strategic planning is at least "somewhat better", if not "much better".

-Respondents indicated strategic planning is "much better" than past methods of town decision making, and therefore particularly strong for:

Visioning the future
Deciding on priorities for action
Developing useful long range goals and actions
Involving the community in the decision making process

-Strategic planning is "somewhat" to "much" better than past methods, for:

Facilitating communication
Achieving results
Anticipating social and economic changes in the community

Scenario Two - "Community Leadership: Acceptance of Strategic Planning As A Beneficial Activity?"

If strategic planning has been accepted by key community decision makers as a beneficial activity for the community to engage in (even with all of its perceived initial awkwardness and growing pains), then both the process and the product could be said to be effective. This measure might conceivably also provide some insights as to whether the strategic process would be made even more effective by reaching beyond the client group to a wider decision making environment.

Thirteen of the eighteen respondents agree (seven "strongly"), that Town Council has accepted strategic planning as a beneficial activity that should be continued (*Figure 4-9*). Only two disagreed. Town Council respondents as a group more strongly agree, with five of the six Council respondents "strongly agreeing". The second set of key decision makers are the project torch-carriers, the Economic Development Committee. EDC responses to all questions in the survey are generally positive, indicating an acceptance of the strategic process and the product as beneficial and effective.

Scenario Three - "The Level of Personal Commitment To Community Economic Development"

If, as a result of their participation, participants in the project were themselves more committed to community economic development, then both the process and product could be said to be effective. A measure such as this provides insight about the ability of the

strategic planning process and the Economic Development Strategy that came out of it to achieve positive results through personal commitments.

Fourteen of the eighteen respondents indicated that as a result of their participation in the project, their commitment to community economic development has increased; almost half of the responses indicate commitment has "increased substantially" (Figure 4-10). Only one respondent indicates that personal commitment "decreased somewhat", while three (one in six respondents) indicate that commitment was unchanged. There is no significant variation in response between Council, EDC, and the other respondents. The increased level of commitment attributed to participation in the project indicates that both the planning process and the product were deemed to be effective.

Figure 4-9 - Town Council Has Accepted Strategic Planning As A Beneficial Activity That Should Be Continued

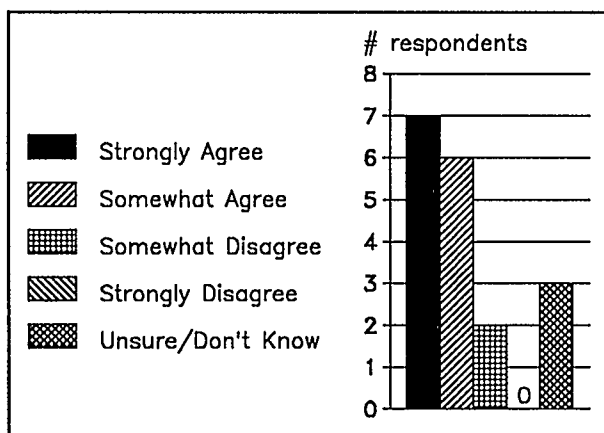
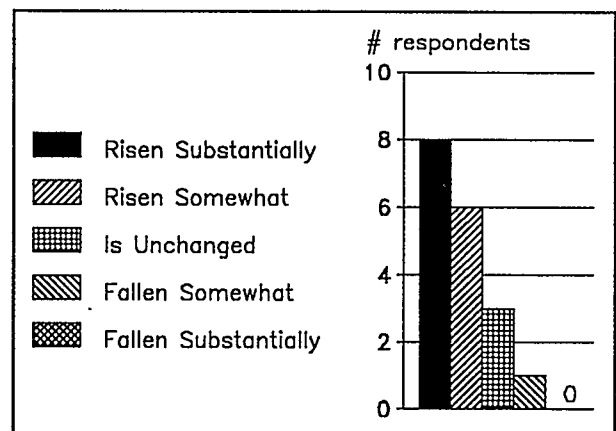


Figure 4-10 - As A Result Of Your Participation In Strategy Process, Your Commitment To Community Economic Development Has...



Scenario Four - "The Strategic Planning Process: It's Influence On The Individual Participant's Personal Decision Making Process"

If participants experienced learning and were moved by the experience to think of applying the strategic process to their personal affairs, then the process might be said to be effective. The degree to which the process touched the workshop participants' personal psyche could conceivably indicate whether strategic planning was believed by them to be a valuable and effective means of decision making.

All eighteen respondents agreed (eight "strongly" and ten "somewhat") that as they make future decisions, they will be employing some of what they learned in the course of the strategic planning process conducted in the Cold Lake project. Not only is strategic planning perceived to be effective in achieving community economic development goals, it is also perceived to have benefit or utility to individuals in their own lives.

Scenario Five - "The Strategic Planning Benefit-Cost Curve"

If the participants' perceived value for the money spent in doing strategic planning; and if they perceived that better results could not have been achieved by other means of planning or decision making, then both the strategic process and the Strategy (product) could be said to be effective.

A large majority of survey respondents "strongly agree" that the benefits of doing strategic planning were well worth the funds spent (Figure 4-11). A majority also believe that better results could not have been achieved by other means (Figure 4-12). Responses to the second proposition are weaker than responses to the perceived value for money, possibly attributable to a lack of knowledge or awareness about the alternative means of decision making or planning.

Figure 4-11 - The Benefits Of Doing Strategic Planning Were Well Worth The Budget Spent On The Project

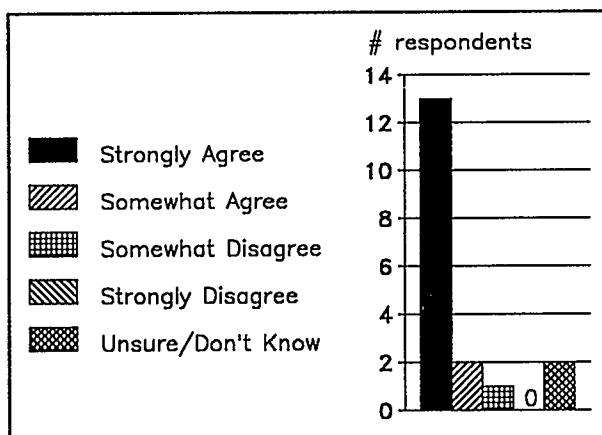
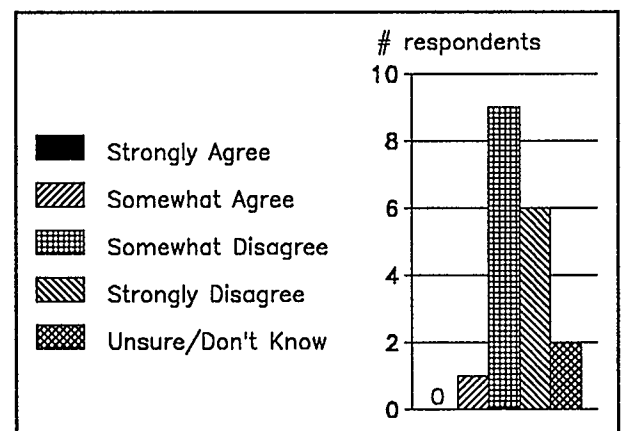


Figure 4-12 - Better Results Could Have Been Achieved By Some Other Means Of Planning Or Decision Making



Satisfactions with these two indicators of effectiveness would tend to suggest that strategic planning and the Economic Development Strategy will likely produce positive impacts on the community.

4.1.5 Chapter Conclusions

In summary, the survey results are clearly indicative of participant-group and stakeholder satisfactions with the strategic planning process for generating an Economic Development Strategy, with the product that was created, and with the likely long-term impact of the process and product. Three indicators of effectiveness were represented in the survey: -Results; -The Process and its contribution to community; and -The Process and its personal psychological impact on participants.

Positive responses to all five scenarios that represented these three key indicators of effectiveness bode well for the continued application of strategic planning to both personal lives and community economic development initiatives, and to long term positive impact on community decision making, the community decision making structure, and perhaps most importantly, the future well-being of the community. Not only have the participants embraced the process by indicating an increased level of personal commitment to community economic development, but town leadership has embraced strategic planning as a beneficial activity. The establishment of links between the political and economic systems, and the psychological commitment to community economic development are two key factors for the future success of the process begun.

Chapter 5 CRITICAL EVALUATION AND REFLECTIONS ON THE COLD LAKE STRATEGY PROCESS

"Make no small plans for they have not the power to stir men's blood"

*Machiavelli
"The Prince", 1514*

This Chapter evaluates the Cold Lake strategy process largely from the perspective of the Project Coordinator. After a brief summary of the strategy process conducted in Cold Lake, we respond to two questions: Will strategic planning applied to community economic development be effective in the future? How can it be made more effective? The Chapter concludes with Cold Lake councillors' comments about the value of the process conducted in Cold Lake.

A six month process was conducted, from June to December, 1992, to provide the client group - the EDC - with a planning programme that could give direction to the committee. The Project Coordinator designed a process which would include a Situational Analysis, and facilitation of four workshops including goal, strategy, and action plan articulation. The Perks/Kawun/Macdonald model (*Perks et al, 1986, 1990*) was adopted as a guide. Three adaptations were made to this model to make a better fit between the planning process and the decision making environment.

A critical evaluation of the Perks/Kawun/Macdonald model revealed an opportunity to establish a better decision making connection between situational awareness (Workshop One and Part 1 of Workshop Two), strategic direction (Workshop Three and Four), and strategic action (Workshop Four) stages of the process. The identification of issues and critical issues was applied to the Cold Lake project; it formed a bridge between the workshops, particularly Workshops Two and Four.

An assessment of Cold Lake's social, economic, and political foundations pointed to a need to emphasize development of capacities (i.e. partnerships, cooperation, participation, integration, effective use of resources, etc.) in the internal environment. Also, the use of Vision Statements rather than Scenarios in Workshop Three, and the creative presentation of one Vision Statement were thought to be an effective means to begin capacities development.

As reported in Chapter 4, the effectiveness of the process was measured by a workshop participant and community stakeholder opinion survey; several measures were incorporated. Survey results indicate that both the process and the product of the strategy planning conducted in Cold Lake were perceived to have a positive benefit and good value for the client group and the community. The Vision Statement was particularly well-received. However, there was a general feeling that there had not been enough discussion about the external environmental forces and their implications. This deficiency would have to be addressed as the project carried on after the departure of the Project Coordinator.

5.1 IMPLEMENTATION

5.1.1 Summary Points About Recommendations in the Final Report

Recommendations in the Final Report were intended to lay out necessary steps for short term operational planning (implementation), all of which were critical to the success of the ongoing planning and the Strategy:

- That the Town hire an Economic Development Officer
- That the Cold Lake Town Council formally adopt the Economic Development Strategy
- That Council and EDC members in particular communicate the substance of the strategy to the public, possibly including a public forum
- That all decision making bodies in contact with the Economic Development Strategy aid in maintaining its visibility and flexibility.
- That a detailed annual workplan be identified by the EDC.

An annual workplan was felt to be key to the success of the Strategy. The workplan would identify selected initiatives in the Strategy and provide more explicit action plan details for day to day EDC operations. An operational plan can be completed each year, or even every two years; they specify a well-defined set of actions to take, and corresponding resources, time, and other commitments required. It may not involve every initiative identified in the Strategy. It instead places an emphasis on a small, manageable number of priority initiatives.

Another key to the success in implementation stages would be continuous Town leadership monitoring. To be effective, and to maintain leadership, the EDC would be required to review the Strategy regularly for its relevance and results.

The Final Report indicated that successful implementation would require leadership and vision, wide scale participation, cooperation, effective communication, unyielding commitment, and patience. Results would not be immediately tangible; and care would have to be taken to maintain interest and complete one or two very small, short term projects. This would have the effect of re-enforcing community opinion that the Economic Development Strategy was a working document rather than a dust-collector.

The Final Report also indicated that to effect change, community "leaders" would be required to go beyond what could be accomplished in the six month time frame of the project. Several components of getting things done successfully (critical success factors) were outlined:

- Committed leadership
- Shared vision of the future
- Effective communication
- Management of implementation
- Use of outside resources when necessary
- Broad-based participation
- Realistic goals and a plan of action
- Creative use of resources
- Recognition of efforts
- Monitoring of change, evaluation of efforts, and revising of plans when required

The Final Report places implementation control in the hands of the EDC, through assignment of action plan responsibilities and timeframes. It further requested that all decision making groups take partial ownership of plan implementation. The EDC was asked to request the regular participation of relevant groups of people, or individuals in the community. The intention was that the Economic Development Strategy be considered a community, rather than a committee responsibility: The Strategy would be treated as a Master Plan of the community's desired future and steps required to achieve that future, rather than a single committee's action agenda.

5.1.2 A Critical Assessment: Suggested Improvements or Modifications

Though survey results indicate general satisfaction with the strategic planning process conducted in Cold Lake, the author identified ten (10) improvements that could be made, as follows:

1) Incorporate Environmental Scanning and Participant Education about the External Environment

Due to their complexity and resource requirements to investigate them adequately, consideration of external environment forces would be more effective in organizational contexts in which the organization has considerable strategic planning experience. In the Cold Lake context, however, the presence of 4 Wing Cold Lake and Imperial Resources provides local residents with an enhanced awareness of the external environment (eg. 4 Wing growth due to base closure in Germany; status of local oil industry based on world oil prices). It was expected that as the process of Workshop 1 and Workshop 2 unfolded, participant contributions would reflect individual assumptions, beliefs, and forecasts about external environment forces relevant to the future of the community. Though this consideration resulted in the Project Coordinator's decision to direct energies to the internal environment, it does not obviate the need for a more formalized approach to external environment planning.

A key to the future success of the Cold Lake Economic Development Strategy will be the incorporation of external environment Opportunities and Threats into the planning process. Though each participant implicitly brings to the workshop table a repository of special knowledge or experience regarding external environment forces, a formalized and more effective approach to the external environment will occur only if a hired employee conducts and facilitates strategic planning activities, and can apply time and resources to it. Future incorporation of external environment considerations will likely aid in contingency identification through an identification of positive, neutral and pessimistic accounts of the future together with the interaction of internal and external decision factors that created these alternative futures. Two stages are envisioned (*United Way, 1985*):

Stage 1

Environmental monitoring

-A detailed assessment of known trends, both current and projected. Assumptions are developed from trends and their implications, which are then used in framing issues in developing strategic direction.

OR

Environmental scanning

-Focusses on unusual or unexpected events or shifts in observed environmental trends. A network of individuals reviews a broad range of written and oral materials and suggest implications. Results may be presented in issue papers that may shift strategic direction.

Stage 2

Scenario development

-Examines important decisions the organization will have to make. The exercise focusses on what the organization knows about societal forces and factors that will significantly affect the organization. Assumptions about the future direction these forces and factors will take are presented in the form of scenarios, which are plausible alternative futures. Scenarios are used to define broad strategic directions.

2) Establish Clear Need for Strategic Planning

The planning process did not make participants or the community aware of what could happen if the community continued down the path established by their social, economic, and political history. In particular situations like Cold Lake, such trend factors might well be developed as a motivational instigator of change.

3) Identification of Contingencies

A single Vision Statement was formulated, and action plans were created largely without benefit of an evaluation of alternative courses of action. The omission was necessitated by project time and budget restrictions. It can be addressed by the creation of annual plans and further strategic planning work in the community. No contingencies were established in the plan; and without a leader knowledgeable in strategic planning, a shift in the planning environment (eg. amalgamation of Cold Lake and Grand Centre EDC's, new EDC members that have not participated in the strategy process, changing Council and Administration attitudes towards strategic planning and community economic development) will threaten the success of the strategy.

4) Reduce Strategy Breadth

Human and financial resources ought to be concentrated on the most significant issues. While a strong majority of the opinion survey respondents agree that the right actions and issues are addressed by the Economic Development Strategy, the action plans are nonetheless broad in scope. They will require resources beyond the capabilities of the client group (EDC) if the Strategy is to be implemented in its entirety by the EDC alone. If the strategy is, however, implemented by Council, committees of Council, and Administration as a Master Plan, it will have a greater chance of success.

The Strategy's comprehensiveness was a product of the participant group, and a response to community issues felt to be the most critical. A trade-off has been created: the Strategy embraces the right set of activities for long-term effectiveness and success, but in the short term the enormous spectrum of activity identified may compromise the abilities of the client group to achieve results. What may work best is the achievement of a balance between general and specific approaches; plans and actions would contain some specificity but would remain general enough to address the many, diverse and cross-impacting issues that must be resolved in a community environment. It is hoped that this balance can be achieved in Cold Lake with the creation of the broad-based Economic Development Strategy in tandem with a more narrowly-defined annual work plan.

5) Departure of Project Coordinator Prior to Implementation of the Strategy

The Project Coordinator's departure prior to the implementation stage of the Strategy, was an unfortunate time to leave the project as it was entering its most critical stage. Without continued, employed leadership, implementation of the Economic Development Strategy becomes threatened -- the Strategy can quickly be seen as a single event, and not a continuous process. The majority of volunteers in today's busy environment do not have the time to give to leadership and motivational roles in community committees. As evidenced by few results achieved in the six months following the Project Coordinator's employment in the community, the Strategy would likely not have been particularly effective had the Project Coordinator not returned to the community to begin implementation of selected initiatives identified in the Strategy. While it was evident that strategic thinking was infiltrating day to day decision making at the Council and Town

administrative levels, there was little evidence that the Economic Development Strategy was being implemented.

To compensate for the contingency that the Project Coordinator might not have returned to the community, the Final Report could likely have achieved better buy-in and commitment if community economic development roles had been specified for various volunteer organizations and Council committees in the municipality; the responsibilities assigned in the Actions Plans might have been identified across a broader spectrum of volunteers and committees.

6) Shorten The Length of the Mission Statement

The fewer the words in a Mission Statement, the greater its marketability. More effort should be spent to refine Cold Lake's. A marketing phrase could be considered to sell the EDC's mission to the public and to raise the visibility of the committee.

7) Narrow the Scope of Critical Issues and Actions

While the Strategy may be an effective document because it addressed the right issues and identified many positive actions, the EDC will encounter difficulty implementing a Strategy of such broad scope. An annual plan would be an effective mechanism by which the EDC selects a manageable set of issues and actions to complete, year to year. If the process was to be conducted again and conditions facilitated the apportionment of greater time to workshops, more time could be spent narrowing the scope of issues and possible directions for action.

8) Improve Communication Between Residents and Community Decision Makers.

The opinion survey results showed weak agreement that the Economic Development Strategy will foster and strengthen community interest and commitment to community economic development. A public forum would have likely have alleviated this. Survey results also indicate a split vote on whether useful new thought and discussion was provoked in the community. Community and youth surveys that had been conducted were intended to facilitate communication in the community; but it is clear that a face to face, public environment such as that offered by a public forum (or several) would have been advisable.

9) Improve Participant Continuity in the Process

While a majority of project participants were satisfied with the number of workshops (three), only a small number of the process participants attended all three workshops. This lack of participant continuity compromised results. An extended project time period that provided more flexible workshop dates would likely have improved the continuity of participant commitments.

10) Incorporate Milestones into Action Plans

Action Plan successes ought to be celebrated by volunteers to encourage continued commitment to the Strategy. The addition of milestones (specific actions or groups of actions that signify when an intended result has been achieved) to individual goal statements and corresponding action plans can serve to acknowledge accomplishments in a public sector, volunteer context where the generation of commitments is a key factor for success.

5.2 RESULTS ACHIEVED TO DATE

With the author's return to Cold Lake after acceptance of a new position in June 1993, there has been opportunity to begin implementing certain portions of the Economic Development Strategy. Several recent activities specific to the Town of Cold Lake indicate that the Strategy is achieving some measures. These are now summarized.

Town Appearance

- An Area Redevelopment Plan process has been completed, focussing on architectural thematic development.
- A large development proposal on Lakeshore Drive was rejected by Council in April, 1993 because Council felt the development did not fit the vision of "marina theme".
- Tree planting and beautification campaigns
- Building demolition -- ten buildings in 1993, and one historical preservation project
- Strengthening of bylaw enforcement of minimum yard maintenance standards and vacant lot cleanup
- New study commissioned on Highway 28 urbanization, aimed at narrowing road widths and incorporation of more landscaping.

Leadership, Vision and Long Range Planning

- Corporate Review completed - January, 1994. The corporate review has altered the Council decision making process (i.e. open question period, committee reporting, better lines of communication between administration and Council)
- Reorganized administrative and Council committee structure to facilitate more effective decision making
- Improved Council/administration responsiveness to public through newly established procedures. Mayor's Roundtable and Town Hall Meetings planned for 1994
- Three Council retreats with Administration to identify priority long term goals
- Chief administrative officer hired
- Director of Municipal Services hired, incorporating planning and development and bylaw functions. The position creates considerable capacity to implement economic development strategy initiatives.
- Chambers of Commerce of Grand Centre and Cold Lake amalgamated to form a joint Chamber - October, 1993.
- Ideas Box created to request public assistance in identifying initiatives.
- Mission-driven budget created for 1994, with five year capital and operational budgets being discussed.
- Certificate program for volunteers developed

Culture and Tourism

- Spring Art Walk (arts and crafts show) on the lakeshore in Cold Lake - 1993.
- Formation of an Allied Arts Council and creation of a local artists directory
- Locating of a craft shop and art gallery in the Tourist Information A-Frame in downtown Cold Lake. A local couple sells wood crafts in exchange for operation of the tourist booth
- Volunteer completion of the newly named "Harbour View Community Centre", which houses multi-purpose community rooms and a library.
- Approval of two thematic, lakeshore commercial developments
- Volunteer project to create a nature trail between Grand Centre and Cold Lake completed in 1993.
- Volunteer organization hosted the 1993 Cold Lake International Airshow - July, 1993
- Canada World Youth Exchange Program (Canada and Indonesia): work placements in the Town Office from September to December, 1993
- The "Shamrock", a (35' X 10') canopied, wood tour boat used on Cold Lake in the 1920's and 1930's has been acquired and is being revitalized for display.
- The oldest cabin in the region at 100 years old, "Honeymoon Harbour", was bought and will be moved to Cold Lake.

Diversifying the Economic Base

- Application made for Business Incubator
- Municipal administration has been in contact with several entrepreneurs regarding mural painting, lake tour boats, hotel, seniors/retirement market condominiums, a four season resort, and a concept plan for rental cottages, restaurant, lounge, and meeting rooms. All contacts that have been made were identified in the strategy process as being priority

initiatives.

Besides those of the author, the EDC, administration, and Council, other endeavours and events are complementing and magnifying the impact of the Economic Development Strategy. Municipal budget cuts, reduced provincial funding to municipalities, and evaluation of the municipal corporation following the termination of the Town Manager in 1992 have instigated many changes. The collective impact of municipal organizational change and the energies directed to implementing the Economic Development Strategy have achieved considerable results in a short period of time. There has been a considerable shift in Council and administrative attitudes; they are now highly receptive to new ideas, diversification efforts, and community economic development initiatives. This may be borne of necessity as the municipality seeks out means to increase organizational efficiency, and to diversify and build the tax base in the community.

5.3 CONCLUSIONS

Several constraints limited the effectiveness of the strategic planning project. The project's awkward timing, short time span, a municipal election, and municipal administration changes all played a role in limiting the scope and quality of both the process and the final product. We would judge that limited implementation resources and relative economic stability that currently pertains in the community will together contribute to reduced energy placed on strategic development and lesser implementation effectiveness. However, it is hoped that participants and decision makers saw enough value in the process and the product to maintain, or revive momentum, in applying strategic planning to their long term policy plans and actions.

The Economic Development Strategy incorporated an array of complementary community economic development activities that diverged from the initial client-group's initial expectations. They are expected, however, to have a long term positive impact greater than if the Strategy had focussed exclusively on the originally-stated goals of business retention and expansion. The results reveal an intimate, participant-group knowledge of the inner workings of their community, and enhanced convictions about the changes required to move the community to a better, pre-determined future. Workshop participants, whether consciously or unconsciously, recognized a long-held tenet of Community Economic Development: development implies more than just finding or subsidizing a new business or a new industry.

The diverse and comprehensive set of goals, strategies, and actions in the Cold Lake Economic Development Strategy reflects a holistic view of economic development. The Strategy recognizes that the health of a community -- physical, social, cultural, and political environments -- and the health of its businesses are intimately woven together and interdependent. Thus, the Cold Lake Strategy addresses many issues often not considered in economic development: town appearance, leadership and long range planning, cultural expression, and an improved quality of life, particularly for youth and seniors. The Strategy reflects the treating of root problems rather than just symptoms.

The outcomes of the planning project are premised on a belief that the community can be proactive and visionary about its development if strategic planning in the context of community economic development is introduced into an environment that has the inherent capacity to embrace change. The Cold Lake decision-making environment possesses this capacity, though it is not yet fully developed.

Further, the Cold Lake strategy process and outcomes are firmly grounded in the views, opinions and vision of a group of residents who came to the table of common cause and set their own agenda for action. Their agenda might be too large, too general, or difficult to achieve considering the constraints of limited resources. But the agenda is theirs to take ownership of, and change as they see fit. Their direction and vision of the future may be quickly dismissed by some as unattainable dreams; but their direction and vision were well-received by decision makers and the community. This bodes well for the future effectiveness of strategic planning in Cold Lake.

One can find in community economic development theory, principles about the "right" way of doing things. But in a public sector-political environment these will not be necessarily practical unless the environment is conducive to re-organizing itself around community economic development and strategic planning; and not unless the community-clients are willing to commit considerable energies over an extended period wherein the significance of the work completed will be seen as tangible in the community. This is the essence of a public sector paradox in planning in the municipal environment: given a municipality's political and divergent interests context, what may be the best form of planning and decision making for the community (community economic development) may not be realistically practical for the very same reasons.

The theoretical propositions of community development are sound, but the concept is often relegated to the realm of academia. This occurs primarily because it is difficult to implement in an environment where the majority does not subscribe to the advantages of collective and cooperative, visionary pursuits. However, in these times of increasing change and prolonged economic difficulty, the philosophical roots of community development must be revisited, and this, through practical application rather than theory discussion. Communities can no longer rely on a higher level of government for direction, advice, and money. Communities can no longer rely on others for their own survival. The community hall will no longer be built by a government but by local hands, local money, and local voluntarism.

In community projects, there can of course, be strong commitment to a unified plan of action; but experience is that the commitment is seldom followed by endless energy being applied to implementing a vision unless there is a catalyst. A steward, an activist, a motivator -- one that can bind the whole and translate community vision into reality -- is required for successful community economic development. If an employed leader is absent, the document that expresses an Economic Development Strategy may easily join a familial profusion of reports and documents that collect dust in a rear room book shelf. The Cold Lake Strategy was headed in that direction! The players and the stakeholders in today's complex and uncertain environment are often too pressed for time to donate considerable energies to action projects. Responsibility must therefore be conferred upon an employed person in the municipal corporation, someone who is knowledgeable of strategic planning and community economic development principles. Any strategic development planning programme ought therefore to become integral to the organization, internally-driven, rather than facilitated by an external consultant. In this, we are confirming a fundamental empirical observation about strategic enterprise: actions must always be coupled with strategic thinking and leadership.

Strategy making is fluid, not static. Strategy making is a continuous process requiring continuous organizational change in order to be successful. Strategic planning is not so much an activity or a process as it is a philosophy of management. Vision is not explicit; it is not inherent in an effective organization -- in attitude, action, and organizational culture. The long-lasting success of strategic planning is most measurable by the degree to which it becomes a management mentality rather than an accounting of direct actions. Though the benefits of strategic planning in this context are not measurable and not directly attributed to an Economic Development Strategy, they are

palpable in the altered mindsets of many people in the community. In our judgement this process is being played out in Cold Lake.

To be effective, strategic planning is not to be approached as a process to be endured but rather, a process to be embraced: we see it as a facilitator of self-discovery and change, and a new way of thinking that can motivate people to rid community blinders. Strategic planning is for participants a continuous voyage of revelation about their community, about change, environment, and themselves. (Idealized) strategic planning in a rural community environment is hopeful and optimistic; it is grounded in a belief that destiny is something to be grasped rather than be tolerated or, conversely, allowed to slip away. Cold Lake now has the basis of words and actions and mindset to proceed with a wide range of initiatives that contribute positively to the social and economic character of the community. Actions in Cold Lake have already illustrated the value and effectiveness of strategic planning application to community economic development in the rural community setting.

Finally: Will strategic planning and the economic development strategy be successful in Cold Lake? A key element of success in any strategic planning conducted in a municipality is linking economic and political systems. Three of the present Councillors provide indications about the community's future:

"When I saw the final presentation my thought was that the Town should have conducted such an exercise many years ago. It would have brought a sense of purpose which could have prevented some of the planning decision which are having a negative impact on our economic development. We should be able to avoid these in future".

"I appreciate the difficult task in trying to develop an Economic Development Strategy in a town that was bordering on disaster. Hopefully, the new Council, new administration, and a new corporate structure will be more effective in promoting economic development. At least we'll try our best".

"I believe that you (the Project Coordinator) and the process that was encouraged have had and will have a significant impact on future Council deliberations. We are in fact, taking preliminary steps to appoint a town employee to be an Economic Development Officer and we have encouraged the Economic Development Committee to provide advice on planning topics. The Economic Development Strategy work completed in Cold Lake will be remembered".

Exigencies of political ideology and/or managerial revolution might well occasion an end to the concept of strategic planning wedded to community economic development that has been presented here. New decision making models and philosophical perspectives on community and economy may well, arise. However, regardless of procedural changes and corresponding, new decision making or philosophical tenets, the need for perceptive, forward looking vision and planning can not be denied; the need for vision has been recognized throughout history. We have grown cultures and elected leaders, and we have invented and grieved with the tool known as vision. The ability to think and plan ahead has never been more necessary than in this time of stupendous change; it will continue to be so for the distant future, as sure as there is life, death, and taxes.

APPENDIX A1

WORKSHOP ONE - STRENGTHS AND WEAKNESSES, OPPORTUNITIES AND THREATS

WORKSHOP 1 - STRENGTHS AND WEAKNESSES, OPPORTUNITIES AND THREATS - ESTABLISHING THE GROUNDWORK

June 25, 1992

Workshop One was designed to familiarize the EDC and other workshop participants with the Strategic Planning Process, and to allow the EDC to be more comfortable with the concepts and sometimes confusing associated acronyms. As the identification of strengths and weaknesses, and opportunities and threats (SWOT) forms the guiding structure of strategic planning, it was felt that the exercise of identifying and ranking perceptions in these areas would be a valuable initiation to the process for workshop participants.

A quick "self study" of the community was conducted with two purposes in mind -- to familiarize the EDC with the process and to make the EDO aware of "local wisdom" and perceptions about the community. This consisted of workshop participants identifying what was perceived to be Cold Lake's Strengths and Weaknesses, as well as perceived Opportunities and Threats to which the community could respond.

This "SWOT" analysis forms the general framework under which a more detailed assessment of strengths and weaknesses, opportunities and threats is to be conducted by the EDO in several areas (seniors, youth, oil and gas, tourism etc.).

Present at the workshop were 5 members of the Economic Development Committee (Hansa Thalesivar, Karen Pinsonneault, Marc Flebotte, Marcel Sanregret, Barry Stevenson), as well as Town Manager Myron Goyan and Town Councillor Ron Olson.

The Workshop was to also include discussion and consensus on "Key Driving Forces" in the world beyond Cold Lake -- issues, trends and other phenomena that are apparent at a scale larger than Cold Lake (regional, provincial, national, or international) . Due to time constraint, this area was not addressed. However, it was agreed that at the next regularly scheduled meeting, the EDO would provide the Committee with what he perceived to be key driving forces, and at this time these would be discussed and agreed upon. Discussion and agreement on Key Driving Forces was reached at the monthly EDC meeting on July 6, 1992.

This briefing is presented in 4 sections:

- I. Community Strengths
- II. Community Weaknesses
- III. Development Opportunities
- IV. Threats to the Community

I. COMMUNITY STRENGTHS

Workshop participants were asked what they felt were Cold Lake's greatest strengths. Participants were not given a definition of what could be classified as a strength, as people have an individual perception of what strengths are to them. Following further questioning by workshop participants, it was suggested by the EDO that participants not restrict themselves to viewing strengths as only tourism-related. They were instead asked to think in the broadest context of the word, encapsulating anything and everything that exists or takes place (social, economic, political, technological) in the community.

Following a fairly exhaustive listing and discussion, workshop participants were asked to individually rank the list of strengths produced from 1 to N, with one being what they felt to be Cold Lake's greatest strength, and N the least beneficial strength.

Responses were varied, but tended to focus primarily on the physical environment, human resources, and tourism-related strengths. Of the top 7 ranked strengths, 6 focus on the physical/natural environment, and only one -- high quality of life -- addresses the social component of the community. Lower ranked strengths primarily address economic and social, and infrastructure issues. Do we need to place greater priority or emphasis on our cultural and social assets?

The following is an aggregated summary of the ranking:

	RANK	
	1	Tourism and recreation opportunities
HIGH	2	Marina
	3	Not polluted - clean water
	4	Many lakes in area
	5	Cold Lake is one of the largest accessible lakes in Alberta
MODERATE	6	Diversity of scenery
	7	High quality of life - one of the best in northeast Alberta

LOW	8	Diverse population with a diverse education base
	9	Esso/CFB Cold lake provide a stable economic base
	10	Close to camping
	11	Tourist population - young, more urban thinking, more demanding
	12	Good road and air transportation links
	13	Large and diverse number of artists
	14	Potential to locate more people and activity here and still not be overcrowded
VERY LOW	15	Not overcrowded - rural setting
	16	Next to Grand Centre - creates a large population base with much potential
	17	Close to large native population
	18	Technical expertise created by presence of CFB Cold Lake
	19	Laid back attitude and lifestyle
	20	Strong community groups
	21	Large industrial area

II. COMMUNITY WEAKNESSES

Workshop participants were asked what they felt were Cold Lake's greatest weaknesses. Again, workshop participants were asked to interpret their own perception of what constitutes a weakness -- but keeping in mind that weaknesses can span anything within the social, economic, political, or technological spheres of the community.

Following a fairly exhaustive listing and discussion, workshop participants were asked to individually rank the list of weaknesses produced from 1 to N, with one being what they felt to be Cold Lake's greatest weakness, and N the least critical weakness.

Responses very clearly address a perceived deficiency in the community (its residents, leaders and decision makers) in terms of the community's ability to create an environment that fosters change, or allows the community the ability to attract "outsiders" (tourists) to visit or businesses to establish themselves here. A "lack of leadership", was far and away identified as the most critical weakness. The highest ranked weaknesses will have to be effectively addressed if the community is to chart a course for the future.

What changes does the community have to make to effectively address the highest ranked weaknesses in setting a course for the community's future?

The following is an aggregated summary of the ranking:

HIGH	1	Lack of local leadership - a lack of a unified approach. There is also a perception that leadership has adopted a "no business" and "can't do" attitude
	2	People (potential tourists) in other communities are not educated about their proximity to Cold Lake and the things that one can do while here. There is a lack of marketing and the marketing that does take place is poor
MODERATE	3	Many people in the Cold Lake have adopted a "bedroom community attitude"
	4	Lack of cooperation or unity between communities

MODERATE	5	Weak commercial core in Cold Lake. No competitiveness in Grand Centre and a lack of good price, and adequate selection
	6	No theme to the community - marketing or physical appearance
	7	Cold Lake is not perceived as a major destination
	8	Lack of drive to force change
	9	No enticement or incentive for business to locate here
LOW	10	Residents are unaware of businesses here
	11	Lack of activities or "things to do"
	12	Volunteer burnout in the community
	13	Long distances to major centres
	14	Economy is too dependent on two industries
	15	Lack of attractions at a large scale
	16	Transient population
	17	There are long winters here - there is also little focus on this travel and tourism segment of the market
	18	Poor physical layout of the Town and poor development control (zoning/bylaws)
VERY LOW	19	The name "Cold Lake" turns off potential tourists
	20	Short summer tourist season
	21	Lack of promotion of volunteer organizations and meetings

	22	Youth's needs are ignored in the community
	23	There is a shortage of safe harbours
VERY LOW	24	The physical proximity or relationship between the commercial and industrial area to the rest of the community.
	25	High business license costs and taxes in Cold Lake.

III. DEVELOPMENT OPPORTUNITIES

Workshop participants were individually asked to provide a list of perceived opportunities for development in Cold Lake. Most responses - similar to responses to "what are the strengths of Cold Lake" focus on the tourism industry.

Are there other non-tourism related opportunities in Cold Lake?

The following is an aggregated list of responses:

Tourism-Related

Natural Environment/Attractions

- Potential for winter-based activities (2 responses)
- Potential for water-based tourism
- Develop a Regional Museum
- Destination Resorts
 - golf
 - winter playgrounds
 - "gateway to Saskatchewan"
- Ski-doo trails (winter resource)
- Provincial Park expansion
- Nature trail around lake
- Mapped and marked ski-doo trails

Tourism Related

Marketing and Promotion

- Build on Kinosoo legend
- Market the entire region instead of just the Town
- Build on Cold Lake's uniqueness
- Quality controlled souvenirs
- Create a product which everyone talks about
- Copyright logo
- Share promotion funding with businesses
- Package rooms, tours, restaurants etc
- "EDO" marketing

Business Development

- Excellent opportunity for tourist-related small business
- Potential for summer condos on lake front
- Involve corporate players as partners in tourism
- 4 season resort on Cold Lake next to ski hill
- Get provincial government to allow private enterprise on crown lands

Business\Industry-Related

- Abundant community population to attract business (2 responses)
- Potential for diverse industry - for example technology-related industry
- Develop an art gallery featuring local artists
- Craft shop
- Technical businesses for support of CFB or Esso
- Potential to attract manufacturing/cottage industries
- Potential to be service centre for 70 mile area
- Specialty shops (unique)
- Use business licenses to develop business incentives

Other

- Seniors need to be a major aspect of future growth
- Potential to capitalize on possible Commonwealth Games in Edmonton
- Attract Sea Cadets
- Facilities for Scouts/Guides
- Cold Lake First Nations
- Festivals

IV. THREATS TO THE COMMUNITY

Workshop participants were individually asked to provide a list of perceived threats that currently, or might in the future, impede the community's aspirations for development. **It is apparent that workshop respondents feel that local attitudes and lack of involvement (and as a result lack of input in setting a future direction or having a vision) in the community are the greatest barriers facing Cold Lake if change is to be embraced.**

The following is an aggregated list of responses:

Social

- attitude of older locals (2)
- transient nature of the community and its associated attitude (2)
- political support for change in the community
- negative attitude of businesspersons, seniors
- lack of community involvement (volunteer etc.) in community affairs
- lack of organization to entice people to volunteer
- other events held the same days as Cold Lake's

Retail/Business

- shopping/commercial dominance of Grand Centre
- multi-national chains
- perception of lack of selection and competitive price - resulting in a large proportion of consumer dollars being spent outside the community.

Weather-Related

- drought (3)
- short summer

Other

- high taxes
- commercial lot prices high on the lakeshore
- "do it first class or don't do it at all"

Following this discussion, the workshop was drawn to a close.

APPENDIX A2 WORKSHOP TWO BRIEFING NOTES

A set of seven Briefing Notes that reported on internal and external environment research findings was prepared by the Project Coordinator for Workshop Two on October 8, 1992:

Internal Environment

- | | | |
|-----------------------------|-------------------|----------|
| -Local Labour Force* | -The Oil Industry | -Seniors |
| -Town Appearance* | -Tourism | -Youth |
| -The Municipal Corporation* | | |

External Environment

- | | |
|--|---------------------------|
| -The Oil Industry | -Demography and Lifestyle |
| -World Political Stability - Implications to Canadian Forces Bases | |

* These Briefing Notes have been included in Appendix A2.

The subject matter of the Briefing Notes was determined by the participant group at an EDC meeting on July 6, 1992; the topics selected were felt to be the most critical to the community's future. Surveys, key informant interviews, and review of documented research was conducted to complete the Briefing Notes.

The Briefing Notes assessed issues, concerns, and opinions within the community, and identified opportunities and trends resulting from the operation of specified external trends and forces perceived to influence Cold Lake's well-being. The base level of information generated for discussion in Part 1 of Workshop Two -- the Situational Analysis -- gave shape to the participant group's identification of community issues in Part 2 of the Workshop Two. The SWOT analysis completed and documented in the form of Briefing Notes was the core of the strategy process conducted in Cold Lake. Workshop participant discussions, perceptions, identification of issues and critical issues, writing of vision statements, and identification of actions plans would all be influenced by this core set of Briefing Notes.

The scheduling of the workshops emphasized the importance of the Briefing Notes to the remainder of the strategy process:

Workshop One -- June 30, 1992
Situational Analysis (SWOT) Research -- July - September, 1992
Workshop Two -- October 8, 1992
Workshop Three -- October 24, 1992
Workshop Four -- November 8, 1992

LABOUR FORCE - SUMMARY

Strengths

- Oil industry and CFB Cold Lake are large employers, accounting for the direct employment of 50% of Cold Lake's labour force.
- Very high proportion of working Town people are wage earners (96%).
- Very low unemployment rate (4%) – has been falling over the last decade
- "Cosmopolitan" labour force – opportunity for new and innovative business arising from continual influx of new employees (and new ideas) from all across Canada
- Average length of residence for Cold Lake residents is gradually rising over the years
- Potential for career training/re-training through Lakeland College or Lee Communications (also some University transfer courses)
- Potential HATS, BSP programs would complement efforts to develop tourism and encourage the establishment of businesses locally

Weaknesses

- Only 1/4 of the labour force that resides in Cold Lake, works in Cold Lake. This proportion has been decreasing over the last few years (was 30% in 1984).
- Most occupations in the area are highly dependent on the health and vitality of only 2 major employment sectors
- Proportion of total Cold Lake labour force employed in oil industry has been in recent decline; Cold Lake is becoming even more dependent on one industry (the Base).
- Proportionately low labour force segment age 15-24 (Affects supply of retail/service related staff)
- 60% Cold Lake population has lived here less than 5 years
- Range of occupations is not diversifying. As a proportion of the total labour force employed in specific economic sectors, almost all employment sectors have experienced decline, with the exception government (CFB Cold Lake).
- Youth (high school age) not aware of local education opportunities
- No local apprenticeship programs that could more effectively integrate Cold Lake and area youth into business and employment
- Limited courses/education designed specifically for high school graduates
- It is likely that the local labour force will remain primarily "2-pronged" for the immediate future. However, as a result of this dependence on two industries, one of which is not open to employment for most people (CFB Cold Lake), there are few quality job opportunities.

The Future

A) A number of labour force-related factors are working in favour of the future growth of the area

- 1) Labour force is diverse and educated due to the presence of CFB Cold Lake and Imperial. For a small community, there is a very cosmopolitan mixture of culture, education, knowledge, experience, and technical expertise – and perhaps most importantly, new ideas.
- 2) Labour force is young
- 3) Postings increasing in length, – spouses will be looking for good quality employment opportunities or business establishment

- 4) Length of residence in the area is on the rise
- 5) Unemployment is low
- 6) Residents feel there is entrepreneurial spirit
- 7) Population has risen dramatically
- 8) Presence of adult education and career training opportunities through Lakeland College and Lee Communications

B) Several factors threaten the future employment situation in Cold Lake:

- 1) Employment dominated by two industries. People feel we are too dependent on them.
- 2) Might be a future concern with underemployment or employment that does not utilize the training and education of the local labour force
- 3) Youth leaving in alarming numbers, don't think they will return.
- 4) Few post-secondary opportunities addressed specifically for the needs of youth
- 5) Lack of **prime** commercial land, or vacant commercial space in already constructed buildings. This may hinder future economic development and thus local job opportunities and diversification of the local economy.

Potential Directions

Western economies are experiencing fundamental shifts from an industrial to a service and informational economy. It is also estimated that nearly 3/4 of new job growth between 1985 and 1995 will come from the small business sector. These two trends can be expected to alter the future composition of the Cold Lake labour force.

With mixed responses to Community Survey questions about the future of both CFB Cold Lake and the oil industry, and given that these two economic sectors provide direct employment for 50% of the Cold Lake labour force, there appears to be an expressed need to encourage new and diverse activities to locate in the area – activities that do not rely on either the oil or CFB Cold Lake industries.

Given the unique characteristics of the local labour force, strategies could address several areas:

- 1) With increased length of postings, encourage potential entrepreneurs on the Base to invest in, or establish businesses in Cold Lake.
- 2) The job market will have to become more flexible and diversified if youth are to remain in the community after high school. If the number of youth leaving the community after high school is determined to be a high priority "critical issue", efforts will have to be made to try to keep youth in the community after high school through educational and training opportunities, business apprenticeship programs etc.
- 3) Identify potential business opportunities that can capitalize on the skills of oil workers should they choose to leave Imperial, or further cutbacks made.

- 4) The local economy is highly dependent on industries that are subject to change given decisions or changes in policy that are made external to the community. Every effort should be made to diversify the economy, and these new businesses and industries should be pursued with the aim of **creating an employment base which stands alone and is driven by decisions made within the community**. In other words, Cold Lake must have enough flexibility in a future local economy so that destiny can be determined, rather than fate decided for us.

Questions?

- The proportionate number of full time employees living in Cold Lake has risen since 1981, and the proportionate number of homemakers and retired people has decreased. Is this a strength or a weakness?
- What specific skills do employees in our two largest industries possess? Given these skills, what types of businesses or industries could be feasible to locate in Cold Lake?
- What types of activities should we be looking at diversifying into?
- Should Cold Lake consider attempting to become a regional educational opportunity base (eg. foreign students, post-secondary, university, adult education)?
- Decisions have been made to increase the duration of residence in one location within the Armed Forces — and these persons will now have a greater likelihood of participating in all facets of community life. How do we encourage potential entrepreneurs living or working on the Base to consider establishing a business in Cold Lake?
- What should be given priority in this area? Retaining youth? Education opportunities? Encouraging Base entrepreneurs?

WHAT DOES THE COMMUNITY SAY?

- 3 In 4 respondents agrees that at present, the economy is too dependent on CFB Cold Lake. While 55% agree that employment will likely improve in the near future, only 10% strongly agree and 40% disagree.
- 7 In 10 respondents agrees that if opportunities arise and conditions are right, there are several entrepreneurs on the Base who will establish or invest in enterprises
- 1 In 2 respondents agrees that Cold Lake is too dependent on the oil industry. However, only 1 In 5 agree that the present state of oil activity is likely to improve in the near future and 2 In 3 say that changes taking place in the industry are not good for Cold Lake.
- 1 In 2 respondents agree that there are local entrepreneurs who will invest in or establish new businesses. However, 1 In 3 are unsure

TOWN APPEARANCE - SUMMARY

*** This Briefing Note will be supplemented by a short slide presentation at Workshop 2.**

A. APPROACH AND ENTRY

Entrance to Grand Centre is scenic — looking down from the height of land

The Cold Lake sign is attractive, but no "welcome", or no "thank-you for visiting" on the way out of town

Some "rag-tag" looking development on the edge of Town - some unkept property and abandoned, rusting old cars project a poor image

Cold Lake has a pretty setting with the lake serving as a backdrop, but there is little to see in front of this backdrop - no visible unique landmarks, little to stir a sense of curiosity or excitement. Current "landmarks" are Macs, Lakeland College, Hlewkas Trailers. Is this ideal?

First impression — "Industrial Area" - not a place that necessarily inspires the imagination. The setting is pretty, but the town entrance lacks trees, the street and two side lanes are extremely wide, and there is a lot of vacant space. Downward sloping change in elevation magnifies the effect.

The general lack of trees from the town entrance right down to the lake is not an image one would have of a "Lakeland" — a wilderness-type area

There is little sense of where the "centre" of town is.

B. ARRIVAL

The marina and the marina grounds are attractive

Streetscaping along Lakeshore Drive is pleasant

No sign or central area Location Map (kiosk) that can tell you what there is to do, where to go to do it, where recreation and entertainment facilities can be found, etc. Not all visitors arrive between 10:30 and 4:30 pm between the months of May and August (current Tourist Booth hours).

Churches in town are attractive — church situated up the hill by the tourist information centre is a notable focal landmark in the "downtown" area

Cold Lake seems like a town with two faces, at odds with each other. Harbour House, Clarks Store, the Bowling Alley are examples of the "modern" Cold Lake. But vacant lots, some scrubby lakefront properties, and some "weary looking" old houses and buildings convey a "tired" image and creates an impression that the community does not care about what it looks like.

Many nicely landscaped, flowered and treed, well-groomed residential yards. However, a number of yards are unweeded, uncut, un-pruned, and some even have parked buses or other vehicles on the properties. These two divergent images again reflect the two faces of Cold Lake.

Bellevue Hotel is an interesting old building, but only one of very few interesting historic buildings

Few or no pedestrians or shoppers in the downtown. Combined with vacant space, the area feels cold and un-welcoming

Presence of Roundel Hotel, the Liquor Store, and assorted people "hanging out" in the area, does little to inspire tourists to take a walk or stay in the area

No activity in the evening

Central portion of town is underdeveloped – lack of defined purpose. What do we want it to be? A business centre? A social gathering place? A place that draws the community together? A place for convenience shopping? A place we want to use at all times of year and at all times of the day? A lack of defined purpose or vision over the last 40 years has resulted in inaction and a resulting general lack of attractiveness.

Most major buildings in town are generally uninteresting, with exception of Harbour House, the Bellevue and Clark's Store.

Many of the negative "images" that can be found in Cold Lake pertain solely to lack of development or underdevelopment.

Newer and latest residential developments are a complement to well executed, standardized housing practices and markets (i.e. a house in Calgary looks the same as a house in Cold Lake). There is nothing visually unique about them.

There is little artistic or otherwise unique expression of what the community is all about (usually expressed in murals, artwork, symbols, activities, signage).

Potential Directions

Cold Lake's economic development future, and its future as a tourist destination, is linked in important ways to two major marketing factors:

1. How the place is seen as we approach and enter it
2. The sense of place we have once we have arrived

There is also a third marketing factor vitally important to tourism in the Cold Lake context:

3. Attracting Edmonton residents and other potential tourists to come and see us – **and visit us again**

These factors apply most strongly to prospective residents and homebuyers. But they can also figure in the equation for business and industry owners and operators scouting Cold Lake as a place to locate. While certain portions of the community are certainly beautiful, the two most important appearance elements - the entrance to Town and the lack of sense of place created in the central portion of Town are unfortunately two of the Town's most unremarkable features.

Image

First impressions are vital to the image that is formed in a visitor's mind. Unfortunately, the first impression one gets of Cold Lake is not representative of the rather positive image the rest of the Town conveys — Kinosoo Beach, Kinosoo Trail, lakefront houses, the waterfront etc. The town entrance and central core area are the least attractive parts of town

Tourists and visitors to communities also notice the small things that contribute to impressions of town appearance — flowers in yards, freshly painted houses and fences, cut grass. All of these minute details of town appearance reflect on the community's pride and spirit, and leave the visitor with either a lasting positive impression, or no impression at all.

Image is not restricted to buildings, streets and trees. Public art in the form of murals or sculptures, or even the friendliness and courtesy extended by local residents can go a long way in conveying a positive image to visitors.

Vacant Space and the "Downtown"

One of the advantages Cold Lake has as a result of the large quantity of vacant space in the Town's central area is a greater ability to create a vision, direction and architectural theme for potential developments. Cold Lake is not one of those places with few redeeming features and the lack of ability to change appearance. **Cold Lake is a place of unrealized potential.**

The vacant space in the central "business" area represents a potentially "unique" opportunity to expand and diversify Cold Lake's commercial base. The downtown can and should become the focal point for the community, with a diverse range of uses and experiences consisting of retail activities, business services, offices, entertainment facilities, cultural activities, recreation, and government.

The greater the variety of social, business and other services provided in downtown, the more likely people will be attracted to downtown and the more adept downtown will become at functioning as the focus of community life - in both social and economic terms.

To undertake any type of development or redevelopment, an expressed need is not enough. Two other key elements are commitment and leadership. Local initiative and commitment, combined with strong municipal support, is the common element in all successful revitalization projects examined (Foreword, Revitalizing Downtown Alberta)

Strategies

With the aim of improving upon Town Appearance, Economic Development Committee strategies could address several key areas:

- 1) Improve Appearance of Town Entrance.**

The material for planter boxes along Highway 28 was cut 10 years ago. They were never constructed due to Alberta Transportation's plan to upgrade the road to "urban standard". Ten years later, the road has yet to be upgraded, but plans are still in the making. Strategies could pursue resolution of this issue to the benefit of the Town, the planting of trees, construction of a unique identifying feature at the entrance to Town, etc.

2) Identify a Visual Theme and Purpose for the Central Area

A unique downtown theme could further stimulate potential tourism opportunities, as well as create an amenable environment, and a gathering place, for local people. Theme can also apply to directional signage in the community (i.e. blue or a particular print style).

Harbour House, with its pitched roof, viewing tower, and porch, provides an example of three elements that could be applied to an architectural theme for the town. This theme would have to be regulated and enforced through an amendment to land use bylaws and the General Municipal Plan. The marina also sets precedent for application of complementary architectural themes. The use of blue, uniform light standards, garbage cans, banners, etc. can provide a rallying point for theme development - and all future development can incorporate these same elements.

3) Beautification and Community Pride - trees, landscaping, trimming

Town appearance improvement projects don't always imply large capital expenditures. Thirty trees were recently planted by volunteers in Nelson Heights park for the very reasonable sum of \$130 dollars. Landscaping and tree planting could be done on an annual volunteer basis – perhaps a "Community Pride Week", murals could be painted by local artists for a small fee on buildings such as the water intake plant, or yearly yard beautification awards could be established. The list of possibilities is virtually endless

4) Policies and Attitudes that Encourage Small Business Retention and Expansion

After a theme has been established, buildings and businesses are needed in two distinct areas:

a) a basic level of business services that address both resident and tourist needs

b) unique businesses that serve a particular market niche in the community (high end retail, arts and craft shops, working chocolate or woodworking businesses, unique old time theatre, water-based themed restaurant, etc) and encourage visitors to spend some time and money in the community

A Town's identity is most often associated with the "downtown". To reduce dependence on basic services provided by businesses beyond Town boundaries and to reduce taxes, the Town must develop a strategy to attract new commercial activities into the community, with the result being the creation of a vital downtown area. Grand Centre is the retail service centre for the area, and Cold Lake can not feasibly compete with this long established fact of life by attempting to duplicate these services. Cold Lake possess a lot of potential to establish a basic level of retail and service activity for both residents and tourists (restaurants, boutiques, water and convenience-related services, high end retail, etc.) in a manner that is complementary to business in Grand Centre (in being unique, "high end"). **If this potential is realized, and this development occurs in relation to a unifying architectural theme, Town appearance and community image will be greatly enhanced.**

Questions

-How do we make changes to Town Appearance without spending a lot of money?

-How do we encourage the establishment of businesses in Cold Lake in buildings that are unique and themed and yet provide for reasonable building costs or rents?

-What specific projects or policies should we be assuming as high priority initiatives? Lower priority, longer-term initiatives?

-Should we be establishing an architectural theme by creating architectural controls? What are the advantages and costs of this?

-What types of basic need businesses do we need? Unique businesses?

-Should we get tough with landowners who own land but don't maintain it or raze dilapidated buildings (grass cutting, weed control, requirement to upgrade, raising of taxes on vacant land to avoid long term vacancy due to speculation etc.)?

SOME POSSIBLE ARCHITECTURAL THEMES AND VISUAL CHANGES

a) Architectural Themes

- similar wood or brick construction material
- pitched roofs - similar colours
- porches
- environmental type colours - browns, greens, reds
- awnings
- towers incorporated into building design

b) Visual Changes

- public art - murals, statues
- trees
- landscaping/flowers
- 2 storey verandas
- landmarks at key points (art work or sensitive building design)
- central park beside Town Office linked to marina by pathway - a central public space that could be used for town activities, a weekly farmers market, outdoor entertainment, etc.
- infill development on vacant land
- small building setbacks from street
- improved town entrance
- yard maintenance and upgrading

WHAT DOES THE COMMUNITY SAY?

-Asked what the EDC's priorities should be, 40% of survey respondents ranked "Improve Town Appearance" as # 1, 2 or 3 in terms of priority (20% gave this a #1 ranking).

This was the second most ranked option, second only to the development and promotion of Cold Lake as a tourist destination

-Asked to list the 1, 2 or 3 most significant negative features of Cold Lake, several made mention of "degenerate" town centre not used by anyone, and with many "shacks" and vacant property.

WHAT DO TOURISTS SAY?

-1 in 2 survey respondents are satisfied or very satisfied with Town Appearance. However, 1 in 4 are dissatisfied or very dissatisfied

-4 in 5 are satisfied with town cleanliness

-while 60% are satisfied with road signage, 30% are dissatisfied

-Visitors are particularly appreciative of the natural scenery, the lakefront, Provincial Park, Harbour House, Kinosoo Beach and town cleanliness

-Rated as unsatisfactory are dilapidated Lakeshore Dr. housing, downtown, and "ugly" town entrance.

-provided with 10 options pertaining to what we should concentrate on improving, Town Appearance was ranked #1 by 20% of respondents.

THE MUNICIPAL CORPORATION - SUMMARY

STRENGTHS

- Economic Development Committee established
- Many planning documents in place, including General Municipal Plan, Land Use Bylaw, and CTAP
- Economic Development Strategy being created

WEAKNESSES

- Land Use development standards pertain to zoning requirements, but requirements concerning physical appearance are vague and subjective
- No explicit policy to "revitalize", or protect the viability of downtown - or at least identify a function for it
- Various municipal decision making organizations appear hesitant to support or pursue initiatives to attract business to establish in the community
- Lack of technical, staff, and capital resources to pursue redevelopment. Redevelopment and development of Cold Lake's central core will have to rely on private entrepreneurs.
- No serviced industrial land or vacant industrial buildings
- Shortage of reasonably priced commercial land and vacant commercial space
- Lack of commercial and industrial activity, which increases the tax burden on local homeowners.
- Homeowner's tax burden is rising (property tax increases average roughly 17% over last two years)
- Unresolved amalgamation issues could hamper or delay Economic Development Strategy initiatives
- Element of dissatisfaction with current community leadership
- Municipal debt load is high - might possibly deter future capital spending
- 1/3 of all Community Survey respondents did not respond to questions about the strengths and weaknesses of Town leadership, even though they completed all other parts of the survey in entirety. Does this imply a lack of knowledge or awareness, or a sense of apathy/lack of caring?

Potential Directions

Survey and numerical data point to a need for strategies that address three areas:

1) Balance the assessment base and reduce debt

The equalized Cold Lake assessment per household is relatively comparable to Provincial and regional averages, indicating at first glance that taxes are not all that high. But, taxes are in fact higher than many other places in Alberta, including Grand Centre, for several reasons:

- There is a small business community in Cold Lake. As businesses usually pay a proportionately higher rate of tax than do homeowners, a lack of business means that Cold Lake homeowners must pay a much higher portion of the total municipal tax revenue.
- High local improvement taxes
- Higher than provincial average utility rates

It is apparent that Cold Lake's municipal tax income relies very heavily on the residential assessment base. **A more balanced assessment base would decrease this burden. There are two options for achieving this. Either Cold Lake amalgamates, or Cold Lake aggressively pursues initiatives which expand the local commercial and industrial business base.**

Current municipal debt loads are high - one of the higher debt servicing as a proportion of yearly budget ratios in the province for a town. **Continued debt will hamper the municipal corporations ability to incur additional capital costs or supply capital to possible future economic development efforts.**

2) Encourage strong leaders to come forward, and provide vision and long range planning, inspire change and community spirit, and work proactively to ensure that Cold Lake is one of those communities that determines her own fate. This applies equally to Town Council, and all sub-committees and boards. Encourage leadership to communicate and establish regular dialogue with the community

No Economic Development Strategy will survive without the acceptance, commitment, and full participation of Town Council/Management.

Many Community Survey respondents feel a sense of dissatisfaction with current community leadership. To sum up perceptions in analogy form, many feel that it is time for Cold Lake to act like a ship with a rudder and direction, rather than a ship floundering rudderless in a turbulent storm. To acquire this "rudder", several respondents would like to see a Council that is more of a proactive, policy-making body, with Town Management handling much more of the reactionary, day to day issues.

Asked in the Community Survey what respondents perceived to be Town Leadership's strengths, the most significant numerical response was "none". Strengths identified included:

MUNICIPAL LEADERSHIP STRENGTHS

- Interested in well-being of the community
- Beautifying the area
- Have developed various projects
- Volunteer nature of council indicates caring attitude
- Gradual improvement upon priorities
- Becoming more "public"
- Initiation of amalgamation
- Not too much bureaucracy

Asked what they perceived to be Town leadership's weaknesses, responses included:

MUNICIPAL LEADERSHIP WEAKNESSES

- Lack of rapport with citizens
- Performance
- Too many have strong Grand Centre interests
- Lack of long term planning/vision
- Personal concern comes before that of whole community
- Lack of leadership
- Lack of enthusiasm for bringing in new business
- Unwillingness to head off in an entirely new direction, exploring new ideas
- Poor action response on issues of community importance

Asked what characteristics ideal future leadership and Town Council might possess, responses focussed in on several themes:

IDEAL MUNICIPAL LEADERSHIP?

- Need long range vision instead of current short-term planning
- More accountable and responsible
- Open public forums on important issues
- Amalgamated Council
- Stronger leadership
- Councillors with no business interests in Grand Centre
- Council with greater emphasis on policy -- not completely consumed with the mechanical aspects of the Town (water, sewer, roads). Leave administration of Town affairs to management
- Leaders who want the best for Cold Lake by keeping taxes down and actively encouraging the establishment of new businesses

3) Through vision and direction, ensure that there is an adequate and economical supply of land and buildings for commercial and industrial activities.

The direct benefit of achieving this goal is a more balanced tax base, but to achieve this goal, great reliance must be placed on the leadership, commitment, direction and vision displayed by Town leadership, including the Economic Development Committee.

Questions

Commercial space is much cheaper to rent in Grand Centre than it is in Cold Lake. How do we get a commitment for a business to locate here if the rent is more expensive, and the only other alternative is to invest heavily in owning and building their own building?

APPENDIX B
COMMUNITY, TOURISM, YOUTH, AND WORKSHOP PARTICIPANT OPINION SURVEYS

COMMUNITY SURVEY

This survey is being conducted by the Economic Development Officer for the Town of Cold Lake Economic Development Committee. The purpose of this survey is to understand the views of people in the community about the present situation, future trends, and prospects for the Town.

I can not over-emphasize the importance of completing the survey - and the positive contribution you will make to identifying a future direction for the Town of Cold Lake.

This survey represents one of several opportunities for the community to have direct participation in the project. It is my belief that the ultimate success of the project, and its continuation as an effective driving force for community change, is a function of the level of community involvement in the process -- and the degree to which the community has expressed their views, opinions, and concerns. The community must feel that they have "ownership" of the plan if economic development initiatives are to be successful.

The results of this survey will directly contribute to the success of the process now underway to identify an **Economic Development Strategy** for the Town of Cold Lake. The project, now in its critical research phase, began two months ago and continues on to the end of December. This survey and other research material will be presented over a series of three community workshops to be held in October and November.

The results of these workshops will be a more complete understanding of forces at work in the community, the generation of a "vision" of what the community might become in the future, and the identification of development projects to be pursued.

Please take 10 minutes to lend your voice to the project. I can promise that your efforts will be heard and addressed.

If you are interested in any way in what the project is all about, or if you want to talk about economic development and the future of your community, please feel free to give me a call or drop in at the Town Office in Cold Lake (639-3351).

The survey is being issued through the mail. **Please be honest and direct about your views and opinions, as all surveys are completely anonymous.**

To return the survey, please drop this off at the Town Office (after-hour drop-offs can be put in the slot to the right of the Town Office doors).

THANK-YOU FOR YOUR COOPERATION!!

COLD LAKE

For most of the questions that follow you should pick a number from the scale below to show how much you agree or disagree with each statement. Please place your response in the space provided to the right of each statement. For the remaining questions, you are asked to fill in blanks or circle a particular response

Scale

- 1= Strongly agree
2= Somewhat agree
3= Somewhat disagree
4= Strongly disagree
5= Unsure/Don't Know

Quality of Community Life

- 1.1 At present, the economy of Cold Lake is satisfactory _____
- 1.2 What the community needs is more economic development _____
- 1.3 At present, the quality of life here is high _____
- 1.4 Economic growth and development in our community would improve our quality of life _____
- 1.5 Generally speaking, relations between the Town of Grand Centre and the Town of Cold Lake are good _____

Youth in the Community

- 2.1 Too many of our youth are leaving the community after high school and not returning to live and work here _____
- 2.2 Youth are leaving the community and not returning because they see no opportunities for business or employment _____
- 2.3 Our youth care strongly about the community and would rather stay than leave _____
- 2.4 Our schools do a good job in giving our children a good appreciation of, and enthusiasm for the community _____
- 2.5 When youth in the community have concerns, these concerns get heard and often have an influence on decisions made in the community. _____

CFB Cold Lake

- 3.1 The changes taking place on the Base these days are good for the Town of Cold Lake _____
- 3.1.1 Please explain the answer you gave above. _____

- 3.2 At present, the economic life of our community is too highly dependent on CFB Cold Lake _____

- 3.3 If opportunities arise and conditions are right, there are several entrepreneurs on the base (technicians, other base personnel, those soon to retire from the forces) who will establish or invest in enterprises (retail, service, manufacturing, trades) in Cold Lake. _____
- 3.4 The present state of CFB Cold Lake activities (employment) is likely to improve in the near future _____

Oil and Gas

- 4.1 At present, the economic life of our community is too highly dependent on the oil and gas sector in the Cold Lake area. _____
- 4.2 Changes taking place within the oil and gas sector these days are good for Cold Lake _____
- 4.2.2 Please explain the answer you gave above. _____

- 4.3 The present state of oil and gas activities in the Cold Lake area is likely to improve in the near future _____

Seniors/The Retired

- 5.1 It would be good for the community if we could attract more retired people and seniors to live here _____
- 5.2 We have all the facilities needed for retired/ senior's entertainment and recreational needs _____
- 5.3 We have all the facilities needed to provide accommodation (housing) for the retired/seniors _____

Retail and Service Trade

- 6.1 Of the businesses that exist in Cold Lake, residents of Cold Lake give strong loyalty and support _____
- 6.2 Most people would prefer shopping in Cold Lake to shopping in Grand Centre if that opportunity were available. _____
- 6.3 Cold Lake possesses a high potential for retail, service, or manufacturing business expansion _____
- 6.3.1 What businesses do you think could locate in Cold Lake, and that you would be willing to support? _____

- 6.3.2 What businesses do you think could locate in Cold Lake, that would be supported by the tourist industry? _____

Tourism

- 7.1 It would be good for the community if we could attract more visitors and tourists _____

- 7.2 There are plenty of attractions and things to do for tourists who visit the Cold lake area _____
- 7.2.2 If you disagree, what would you say is missing? _____
- 7.3 We have all the facilities needed to accommodate and entertain visitors _____
- 7.4 Visitors to Cold Lake use facilities such as hotels and motels, restaurants, retail stores and other services. Generally speaking, the variety and quality of services in these businesses is quite good _____
- 7.4.2 If you disagree, please explain why. _____
- 7.5 The Town of Cold Lake adequately markets and promotes itself at present _____
- 7.6 Our community attitude, the attractions and events we have to offer and the general physical appearance of the town all project a favourable "image" to tourists _____
- 7.6.2 If you disagree, what would you say is lacking? _____
- 7.7 Are you aware of the Tourism Action Plan that was prepared for Cold Lake?
- Yes _____ No _____
- 7.7.2 In a few words, could you describe your impressions (positive or negative) of the Plan, and of the impact it is having on the community? _____

Economic Development and the Future

- 8.1 Generally speaking, there is a strong sense of optimism in our community about the future of Cold Lake. _____
- 8.2 In the future, we see the role of tourism in our local economy as:
(please circle one choice only)
- | | |
|-----------------------------|-----------------------|
| A. declining in importance | B. remaining the same |
| C. increasing in importance | D. no opinion |
- 8.3 In the future, we see the role of oil and gas in our local economy as:
(please circle one choice only)
- | | |
|-----------------------------|-----------------------|
| A. declining in importance | B. remaining the same |
| C. increasing in importance | D. no opinion |
- 8.4 In the future, we see the role of CFB Cold Lake in our local economy as:
(please circle one choice only)
- | | |
|-----------------------------|-----------------------|
| A. declining in importance | B. remaining the same |
| C. increasing in importance | D. no opinion |

8.5 In the future, we will have to make a strong effort to diversify the local economy more _____

8.5.1 If you agree, what should Cold Lake be looking at diversifying into?

8.6 Our schools do a good job in preparing our youth for going into private enterprise or into business for themselves someday. _____

8.7 If opportunities arise and conditions are right, there are a number of local entrepreneurs who will invest in, or establish businesses in Cold Lake _____

8.8 Complete the following phrase..."in the future I see Cold Lake as primarily ...
(Circle the one or two you feel to be the most likely)

- a) a bedroom community to Grand Centre (i.e. reliant on Grand Centre for most shopping, service, recreation, and entertainment needs)
- b) a tourism town
- c) an industrial community with many new light industries locating here
- d) a retail and service-oriented community
- e) a retirement community
- f) an oil and gas town
- g) a military town
- h) other (please specify) _____

8.9 What do you feel the Cold Lake Economic Development Committee's priorities should be?
(Using the numbers 1, 2 and 3, and selecting only three of the categories listed below, indicate what you feel are the top three needed improvements)

- _____ attract retired people and seniors to live here
- _____ improve town appearance by encouraging development and redevelopment of Cold Lake's central area
- _____ improve variety and quality of cultural events and festivals
- _____ improve local hospitality and quality of service
- _____ improve town cleanliness and town pride
- _____ attract environment-friendly "green" industry to locate in the area
- _____ attract heavy industry (oil, large scale manufacturing) to locate in the area
- _____ attract light industry (small scale manufacturing) to locate in the area
- _____ encourage small business retention and expansion
- _____ encourage greater cooperation and coordination with Grand Centre
- _____ development and promotion of Cold Lake as a tourism destination
- _____ promotion and marketing of what already exists in Cold Lake
- _____ other (please specify) _____

8.10 Complete the following statement - What Cold Lake really needs is

8.11 What are the one or two most critical issues that you feel Cold Lake must address as it looks to the future?

- 1. _____
- 2. _____

The Relationship Between Cold Lake and Grand Centre

9.1 Cold Lake should amalgamate with Grand Centre _____

- 9.2 The economy of Cold Lake is too dependent on what takes place in Grand Centre _____
- 9.3 A joint Grand Centre/Cold Lake Economic Development Committee would better serve the individual communities of Grand Centre and Cold Lake (at present, there are two distinct economic development committees - one in Grand Centre and one in Cold Lake) _____

Municipal Leadership - Cold Lake

- 10.1 What, do you feel some of the **strengths** of Town Council/Management are? What might you perceive as being some positive features in terms of functioning, structure, or priorities? _____
- 10.2 What, if anything, **concerns** you about Town Council/Management? What might you perceive as being shortcomings in functioning, structure, or priorities? _____
- 10.3 If you were to envision an ideal Town Council and management serving the area 5 years from now, how would you describe it and in what way would it be different than the present situation? _____

Some Further Thoughts

- 11.1 Please list the 1, 2 or 3 most important assets or positive features of Cold Lake
1. _____
 2. _____
 3. _____
- 11.2 Please list the 1, 2 or 3 most serious drawbacks or negative features of Cold lake
1. _____
 2. _____
 3. _____
- 11.3 Would you like to tell us more about what you see happening in the community in the future, or express some concerns or satisfying aspects about community life?
- _____
- _____
- _____

Length of residence in Cold Lake? ____ years

Where do you work?
(circle one only)

- | | |
|---------------------------------|-----------------|
| a. in Grand Centre | b. in Cold Lake |
| c. MD. of Bonnyville | d. on the base |
| d. other (please specify) _____ | |

Male: _____ Female: _____

Age: _____

Occupation: _____

Thankyou for taking the time to answer the questions

Please Return This to The Town Office in Grand Centre or Cold Lake

18. Complete the following phrase: "The improvements that I have just noted would result in... (circle one)

1. Return visits several times yearly
2. Future return visits once a year
3. Occasional visits over a number of years
4. No return visits to Cold Lake in future

19. List one or more specific attractions, events, type of promotion, services, activities, or changes to the appearance of Town which would increase your enjoyment of the area.

1. _____
2. _____
3. _____

20. What have you seen in other places you have visited that Cold Lake or area should consider for tourism?

1. _____
2. _____
3. _____

21. We are trying to identify a catchy two or three word phrase that describes what Cold Lake is all about (a theme). If you were to tell someone about Cold Lake in 2 or 3 words, how would you characterize it?

22. How would you compare your experience(s) as a visitor to Cold Lake or the Lakeland region to your experiences as a visitor to other areas in Alberta or Canada? (Check One)

- ☐ Excellent - Far Superior to Other Areas
☐ Above Average - better than many other areas
☐ Average - No better/worse than anywhere else
☐ Below Average - Some or Many Things Missing
☐ Very Poor - Much worse than elsewhere

23. In planning your trip, what was your primary source of information about the Lakeland region? (Please choose the one, two or three primary sources)

- ☐ Travel Agent ☐ Brochures/Advertisements
☐ Word of Mouth ☐ Magazine/Newspaper
☐ Previous Trips ☐ Live in Area
☐ Tourist Info Booth ☐ Friends/Relatives
☐ Discovered on trip elsewhere
☐ Other (please specify) _____
☐ Had no prior information

24. Which of the following activities have you participated in on this trip to the Lakeland region? In the blank provided, indicate how enjoyable you thought it was by rating it from 1 to 5 (1-Excellent, 2-Good, 3-Neutral-Same as Anywhere Else, 4-Poor, 5-Very Poor)

- | | |
|---|---|
| <input type="checkbox"/> Rodeo | <input type="checkbox"/> Native/Metis Events |
| <input type="checkbox"/> Swimming | <input type="checkbox"/> Bird Watching |
| <input type="checkbox"/> Tennis | <input type="checkbox"/> Spectator Sports/Event |
| <input type="checkbox"/> Golf | <input type="checkbox"/> Historic Sites/Museums |
| <input type="checkbox"/> Fishing | <input type="checkbox"/> Local Event/Concert |
| <input type="checkbox"/> Hunting | <input type="checkbox"/> Camping |
| <input type="checkbox"/> Horse Riding | <input type="checkbox"/> Sightseeing |
| <input type="checkbox"/> Boating | <input type="checkbox"/> Photography |
| <input type="checkbox"/> Hiking/Backpacking | <input type="checkbox"/> Cycling |
| <input type="checkbox"/> Other (Please specify) _____ | |

25. What retail or service businesses are required in Cold Lake that would make things more convenient for you or increase your enjoyment of the area?

1. _____
2. _____
3. _____

26. Have you visited the Cold Lake area in the winter?

☐ Yes ☐ No

If yes, what attractions or events do you come to see or participate in?

What types of winter attractions or events would you possibly come to see, or participate in in the winter?

27. Based on your experience to this point, would you again visit.....

Cold Lake? ☐ Yes ☐ No

The Lakeland Region? ☐ Yes ☐ No

Could you please tell us why you feel that way?

28. Please indicate from the choices below roughly how much you'll spend (accommodation, food, shopping, other tourist services) during your stay in:

Cold Lake?	The Lakeland Region (Excluding Cold Lake,
<input type="checkbox"/> Less than \$100	<input type="checkbox"/> Less than \$100
<input type="checkbox"/> \$100-\$249	<input type="checkbox"/> \$100-\$249
<input type="checkbox"/> \$250-\$499	<input type="checkbox"/> \$250-\$499
<input type="checkbox"/> \$500-\$999	<input type="checkbox"/> \$500-\$999
<input type="checkbox"/> \$1000-\$1499	<input type="checkbox"/> \$1000-\$1499
<input type="checkbox"/> More than \$1500	<input type="checkbox"/> More than \$1500

29. Could you please indicate which of the following your total household income fits into (ie. the total gross income you and your spouse earn before taxes)

<input type="checkbox"/> Less than \$15000	<input type="checkbox"/> \$45000-\$60000
<input type="checkbox"/> \$15000-\$29999	<input type="checkbox"/> Over \$60000
<input type="checkbox"/> \$30000-\$44999	

30. Could you please indicate the highest level of education attained by you and/or your spouse.

You	Spouse
<input type="checkbox"/> _____	<input type="checkbox"/> Less than Grade 9
<input type="checkbox"/> _____	<input type="checkbox"/> Grade 9-12
<input type="checkbox"/> _____	<input type="checkbox"/> Community College/Tech School
<input type="checkbox"/> _____	<input type="checkbox"/> University

31. If you have any additional comments about your trip or the Lakeland region not covered by the survey, please feel free to use the space below.

Thankyou for taking the time to complete the survey - your assistance in helping us work towards improved tourism facilities and businesses in the area is much appreciated. If you have any questions regarding this survey, contact Rob Miller, Executive Director of Lakeland Community Futures Committee, Bonnyville, Alberta at (403) 826-3858.

If you are unable to return this to the place you picked it up, please drop the survey off at Harbour House (615 Lakeshore Drive), The Marina Bowling Centre (904-7 Ave.), or the Town Office (718-10 St. 8:30am-4:30pm)

The Lakeland Region Tourism Survey 1992

COLD LAKE



Prepared by:
Lakeland Community Futures Committee

In Cooperation With:
The Town of Cold Lake
The Town of Grand Centre
The Town of Bonnyville
The Village of Glendon
Fishing Lake Metis Settlement

HELP US HELP YOU!!!

This will be used to provide information about tourist activity and to better understand tourist needs. Your cooperation in completing this short survey (5-10 minutes) would be greatly appreciated. Please be assured that your answers will be kept strictly confidential.

Don't be afraid to be critical or negative in some of your responses - constructive criticism will only help us better serve you in future.

1. Where do you live (i.e. permanent residence) ?

2. What is your primary destination on this trip?

3. Are you visiting on a (check one only)

☐ Weekend ☐ Weekday

4. How are you travelling?

☐ Car ☐ RV or Motor Home

☐ Organized Club/Tour

☐ Other (please specify) _____

5. How long do you think you'll be in Cold Lake?

____ (Days)

6. How long do you think you'll be in the Lakeland region? (Please see Map, next page)

____ (Days)

7. Have you or anyone in your group visited....?

-Cold Lake before? ☐ Yes ☐ No

-Lakeland Region before? ☐ Yes ☐ No

If yes, how many times have you been here?

☐ 1-2 ☐ 3-5 ☐ 6-9 ☐ 10+

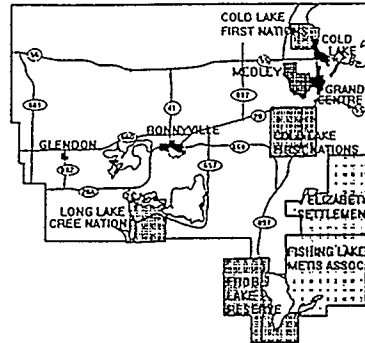
How many years have you been coming to the area?

____ (Years)

What is your primary reason for returning to the area?

8. If you have never been to Cold Lake or the Lakeland region before, what attracted you to visit here?

THE LAKELAND REGION



9. What is your main reason for visiting the area on this trip?

☐ Planned Vacation ☐ Personal Business
☐ Special Events ☐ Shopping
☐ Visiting Friends/Relatives
☐ Other (please specify) _____

10. Where are you staying overnight while here?

☐ Hotel/Motel ☐ With Friends/Relatives
☐ Camping ☐ Other (please specify) _____

☐ Not staying overnight

11. How many people in your travelling party (including yourself) are in each of the following age categories?

☐ Adults 60 and older ☐ Adults 20-29 Years
☐ Adults 45-59 years ☐ Youths 13-19 Years
☐ Adults 30-44 years ☐ Children 12 + under

12. Your honest opinion about Cold Lake would be very helpful to us in determining how to serve you the tourist. (Rate your satisfaction with the following 1c area features as Very Satisfied (VS), Satisfied (S), Neutral - as good as anywhere else (N), Dissatisfied (DS), or Very Dissatisfied (VDS) by circling the appropriate number).

	VS	S	N	DS	VDS
Variety/Quality of Restaurants	1	2	3	4	5
Accommodation	1	2	3	4	5
Variety/Quality of Cultural Events (music, theatre, festivals etc.)	1	2	3	4	5
Variety/Quality of Attractions (lakes, hiking, museums etc.)	1	2	3	4	5
Friendliness-local people	1	2	3	4	5
Variety/Quality of Tourism Services (gas, food, washrooms, supplies etc.)	1	2	3	4	5
Town Cleanliness	1	2	3	4	5
Town Appearance (storefronts, landscaping, attractiveness of streets)	1	2	3	4	5
Quality of Local Information (what to see and do)	1	2	3	4	5
Friendliness of Service	1	2	3	4	5
Tourism related Road Signage (attractiveness, clarity of information etc)	1	2	3	4	5
Personal Safety	1	2	3	4	5
Price of Goods/Services	1	2	3	4	5
Overall experience	1	2	3	4	5

13. As a visitor or tourist, is there anything about Cold Lake that you particularly appreciate or enjoy? (eg. People, Scenery, Service etc.)

 2. _____
 3. _____

14. Is there anything you find particularly unsatisfactory in Cold Lake?

1. _____
 2. _____
 3. _____

15. Is there anything that you have found to be unique about Cold Lake compared to other Towns that you have visited? _____

16. Thinking about the visual appearance of the Town, what do you find particularly?

Appealing? _____
 Unappealing? _____

17. We would now like to know what you feel we should concentrate on improving to provide visitors with an even more enjoyable experience. Using the numbers 1, 2 and 3 and selecting only three of the categories listed below, indicate what you feel are the three needed improvements.

- ☐ Improve Town Appearance
- ☐ Improve Variety/Quality of Cultural Events/Festivals
- ☐ Improve Variety/Quality of Accommodation
- ☐ Improve Local Hospitality
- ☐ Improve Level of Tourist Services
- ☐ Improve Quality of Local Information and Promotion about things to see and do here
- ☐ Improve Number of Things to Do and See
- ☐ Improve Town Cleanliness
- ☐ Improve Promotion at Regional Scale (i.e. Lakeland) including such things as circle driving tours, bird watching guides, hiking tours etc.
- ☐ Other (specify) _____

Tri-Town Youth Survey

Your answers to this questionnaire will help us get some idea of how you feel about the Tri-Town area, and what changes you would like to see. Please take your time and answer as best you can.

I. First, a few words to circle: (circle the appropriate one in each row)

Program:	General Diploma	Matriculation
	Honours Program	

Gender: ☒ Male ☐ Female

Do you live in: Grand Centre Cold Lake Medley

II. Next, a few questions about your view of the Tri-Town area:

1a) Please list one or two things you like most about living here?

1. _____

2. _____

1b) Please list the one or two things you dislike the most about living here?

1. _____

2. _____

2) What is your overall view of the quality of life in the Tri-Town? (circle one)

Excellent	Good	Fair	Poor	Very Poor
1	2	3	4	5

3a) Does the Tri-Town appeal to you as a place to live and work in the future (after you have completed your education)?

Yes No (circle one)

3b) Please explain your response.

III. Now we'd like to know your feelings about Tri-Town's services

1) How satisfied are you with the quality and availability of local services:

	Excellent	Good	Average	Poor	Very Poor
-Recreational facilities	1	2	3	4	5
-Entertainment	1	2	3	4	5
-Shopping	1	2	3	4	5
-Other _____	1	2	3	4	5

2) Are there some entertainment, recreation or shopping services that you feel you need that are not offered in the Tri-Town? **Please list:**

3) With this table, we'd like to find out how often you go to towns/cities other than the Tri-Town, and what you do there. Please check the box which best describes how often you go to each town/city, then list your reasons in the last box.

	1-3 times a year	once a month	every weekend	why?
Bonnyville				
St. Paul				
Lloydminster				
Edmonton				

4a) Are there any post-high school courses offered **locally** that you are interested in?

Yes	No	(circle one)
→ If yes, where/who offers the courses? _____		
→ Which courses interest you? _____		

4b) What other courses would you like to see offered locally that are not currently offered?

IV. Now some questions about your future plans:

1) Do you feel high school is doing a good job of preparing you for the future? Yes No
(briefly explain)

2) Do you plan to attend a post-secondary institution after high school?

Yes

No

If yes, please circle the appropriate institution:

University

Technical School

College (NAIT, SAIT etc.)

Other _____

3a) If you are leaving the Tri-Town to further your education, do you intend to return to live and work here afterwards? Yes No (circle one)

3b) Why or why not?

4a) If you are not leaving to further your education, do you see yourself staying here? Yes No (circle one)

4b) Why or why not?

V. Some questions about how you view employment and enterprise opportunities in the Tri-Town.

1) Are you currently working? Yes No

2) What kind of employment will you look for and where do you think you will look after you graduate?

3) Do you feel that there are job opportunities for youth in the Tri-Town? Yes No

Please Explain: _____

4) Are you considering going into business for yourself in the Tri-Town?

Yes

No

→ If yes, what type of business? _____

→ Is High School preparing you for this? _____

5) Can you think of a new enterprise that would create employment and business opportunities for youth (15-21) in the Tri-Town?

VI. Agree or Disagree with the Following Two Statements

1) After graduation, youth is leaving the community because they see no opportunities for business or employment

Strongly Agree Somewhat Agree Somewhat Disagree Strongly Disagree Don't Know

1

2

3

4

5

2) High School graduates care strongly about the community and would rather stay than leave

Strongly Agree Somewhat Agree Somewhat Disagree Strongly Disagree Don't Know

1

2

3

4

5

VI. Last Section, Almost Done

1a) What proportion of your friends are planning to leave the Tri-Town after high school graduation?

_____ %

1b) Of this proportion that you have just indicated will be leaving the area after high school graduation, what proportion do you think might eventually return someday after they go to university, college, or work in the city for a few years.

_____ %

Thankyou for taking the time to answer the questions.

COLD LAKE ECONOMIC DEVELOPMENT STRATEGY
An Evaluation of the Planning Project - June - December, 1992

It should take you roughly 15 minutes to complete the survey. Please put your completed questionnaire in the postage-paid, return envelope provided and toss it in the mail.

Check off one (or more) of the following:

7 Economic Development Committee (EDC) Member 6 Council Member
5 Other

Which of the following did you attend?

4 Workshop 1 - EDC Meeting, June 30 Note: with EDC, one Council rep. only
10 Workshop 2 - Situational Analysis, October 8
10 Workshop 3 - Visioning, October 24
12 Workshop 4 - Goals, Strategies and Action Plans, November 8
9 Final Presentation to Council, December 8

PART 1 -- THE PROCESS

I would like to evaluate the strategic planning process -- the workshops and activities completed to create the Economic Development Strategy.

Note: This is distinct from evaluation of the project's end results (i.e. Vision, Goals, Strategies, and Actions), which I will be asking you about in Part 2 of the survey.

1.1 I am interested in having your assessment of three of the Workshops. Indicate how effective you think each workshop was in stimulating thought and achieving results by circling the appropriate number.

Respond only for those workshops you attended.

	Very Effective	Somewhat Effective	Not Very Effective	Not at all Effective
WORKSHOP				
Situational Analysis (October 8)	6	5	0	0
Visioning Workshop (October 24)	4	5	1	0
Goals/Strategies/Actions (November 8)	7	3	2	0

- 1.2 Given your role in the Strategic Planning process, what elements of the process do you feel were particularly satisfying or dissatisfying to you in the performance of your role? Indicate your level of satisfaction/dissatisfaction by circling a number from 1 to 4.**

	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied
Number of workshops you had to attend	9	5	0	0
Length of time taken to complete workshops	7	4	3	0
Time span of project (June-December)	8	5	1	0
Time span of your participation in workshops (October/November)	10	3	1	0
Leadership/project management abilities of Project Coordinator	6	7	1	0
Project objectives were usually clear	8	4	2	0
Objectives set for workshops effectively achieved	4	9	1	0
Briefing Notes for Situational Analysis Oct. 8 (yellow-covered)	6	4	2	0
Slide presentation on town appearance	7	3	1	0
Workshops involved right people with good effect	7	5	0	1
Process interesting to participate in – i.e. "not routine"	10	2	2	0
Process allowed you to participate effectively	9	3	2	0

- 1.3 Compared to your recollection of past methods of town decision making and planning, how do you rate the Strategic Planning process you participated in as a method for... :**

	Not as Good	More or less the Same	Much Better	Much Better
Visioning the community's future	0	0	3	11
Anticipating social and economic changes in the community	0	1	7	6
Facilitating communication	0	1	9	4
Involving the community in the decision making process	0	1	5	8
Achieving results	0	1	8	5
Deciding on priorities for action	0	2	2	10
Developing useful long range goals and actions	0	1	2	11

- 1.4 Do you have any positive or negative comments on the process that would be helpful to know?

-See Responses at end of survey

PART 2 -- RESULTS OF THE STRATEGIC PLANNING PROJECT

Thinking of events in the community today, four months after the completion of the project, I would like to know what you think about the Economic Development Strategy, and what you perceive to be its ultimate effectiveness.

For many of the questions that follow, pick a number from the scale below to show how much you agree or disagree with each statement. Please place your response in the space provided to the right of each statement. For the remaining questions, you are asked to fill in blanks or check particular responses.

Scale

- 1 = Strongly Agree**
2 = Somewhat Agree
3 = Somewhat Disagree
4 = Strongly Disagree
5 = Unsure/Don't Know

The Vision Statement -- "Footsteps of the Future"

- | | | |
|-----|---|----------------------------|
| 2.1 | The Vision Statement is a strong motivator for the community to achieve the Economic Development Strategy's goals | 1=7, 2=9, 3=2
4=0, 5=0 |
| 2.2 | There was not enough talk about how we respond to forces and events in the world outside Cold Lake (eg oil prices, population aging, changing defense policy, etc.) | 1=2, 2=12, 3=3
4=1, 5=0 |
| 2.3 | The Vision Statement's creativity and imagination in presentation will help in encouraging community involvement and commitment | 1=8, 2=9, 3=1
4=0, 5=0 |
| 2.4 | The Vision Statement encompassed most of the ideas and opinions expressed by participants in the workshops | 1=11, 2=3, 3=1
4=0, 5=3 |
| 2.5 | The Vision Statement is not realistic enough (i.e. the goals were set too high) | 1=1, 2=6, 3=3
4=8, 5=0 |
| 2.6 | The Visioning exercise was a good way of exploring the future | 1=12, 2=6, 3=0
4=0, 5=0 |
| 2.7 | The Vision Statement will be useful in guiding future decisions made by the Economic Development Committee | 1=13, 2=3, 3=1
4=1, 5=0 |
| 2.8 | The Vision Statement will be useful in guiding future decisions made by Council | 1=9, 2=5, 3=2
4=1, 5=1 |
| 2.9 | Having a Vision Statement serves a useful purpose in the overall planning task that we were engaged in | 1=13, 2=5, 3=0
4=0, 5=0 |

2.9.1 If you answered 3, 4, or 5 to statement 2.9, please explain: _____

- 1.4 Do you have any positive or negative comments on the process that would be helpful to know?

-See Responses at end of survey

PART 2 -- RESULTS OF THE STRATEGIC PLANNING PROJECT

Thinking of events in the community today, four months after the completion of the project, I would like to know what you think about the Economic Development Strategy, and what you perceive to be its ultimate effectiveness.

For many of the questions that follow, pick a number from the scale below to show how much you agree or disagree with each statement. Please place your response in the space provided to the right of each statement. For the remaining questions, you are asked to fill in blanks or check particular responses.

Scale

- 1 = Strongly Agree**
2 = Somewhat Agree
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4 = Strongly Disagree
5 = Unsure/Don't Know

The Vision Statement -- "Footsteps of the Future"

- | | | |
|-----|---|----------------------------|
| 2.1 | The Vision Statement is a strong motivator for the community to achieve the Economic Development Strategy's goals | 1=7, 2=9, 3=2
4=0, 5=0 |
| 2.2 | There was not enough talk about how we respond to forces and events in the world outside Cold Lake (eg oil prices, population aging, changing defense policy, etc.) | 1=2, 2=12, 3=3
4=1, 5=0 |
| 2.3 | The Vision Statement's creativity and imagination in presentation will help in encouraging community involvement and commitment | 1=8, 2=9, 3=1
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| 2.4 | The Vision Statement encompassed most of the ideas and opinions expressed by participants in the workshops | 1=11, 2=3, 3=1
4=0, 5=3 |
| 2.5 | The Vision Statement is not realistic enough (i.e. the goals were set too high) | 1=1, 2=6, 3=3
4=8, 5=0 |
| 2.6 | The Visioning exercise was a good way of exploring the future | 1=12, 2=6, 3=0
4=0, 5=0 |
| 2.7 | The Vision Statement will be useful in guiding future decisions made by the Economic Development Committee | 1=13, 2=3, 3=1
4=1, 5=0 |
| 2.8 | The Vision Statement will be useful in guiding future decisions made by Council | 1=9, 2=5, 3=2
4=1, 5=1 |
| 2.9 | Having a Vision Statement serves a useful purpose in the overall planning task that we were engaged in | 1=13, 2=5, 3=0
4=0, 5=0 |

2.9.1 If you answered 3, 4, or 5 to statement 2.9, please explain: _____

Scale

1 = Strongly Agree
 2 = Somewhat Agree
 3 = Somewhat Disagree
 4 = Strongly Disagree
 5 = Unsure/Don't Know

The Economic Development Committee and Town Council

3.1	The strategic planning process has improved the decision making ability of the Economic Development Committee (EDC)	1=1, 2=10, 3=1 4=0, 5=5
3.2	The project has improved the EDC's ability to take a leadership role in the community	1=4, 2=6, 3=2 4=0, 5=5
3.3	Town Council has accepted strategic planning as a beneficial activity that should be continued	1=7, 2=6, 3=2, 4=0, 5=3
3.4	The planning process we went through between June and December, and the resulting Economic Development Strategy has given a new sense of direction to community decision makers	1=3, 2=11, 3=1 4=0, 5=2
3.5	The Economic Development Strategy will encourage greater communication and collaboration between Council, committees of Council, town management, and the "public"	1=7, 2=10, 3=0 4=0, 5=1

Community Benefits

4.1	The planning process fostered a sense of excitement about the future	1=7, 2=10, 3=1 4=0, 5=0
4.2	The planning process provoked useful new thought and discussion about the future of the community.....	
	...for most or all workshop participants	1=11, 2=4, 3=0, 4=0, 5=3
	...in the community at large	1=1, 2=7, 3=6, 4=1, 5=3
4.3	The planning process has opened many people's minds to new opportunities	1=4, 2=14, 3=0 4=0, 5=0
4.4	The Economic Development Strategy will foster and strengthen community interest and commitment to economic development	1=5, 2=13, 3=0 4=0, 5=0
4.5	The Economic Development Strategy is exactly what we should be doing:	
	-- we correctly identified the issues the community must address to grow and prosper	1=10, 2=6, 3=2 4=0, 5=0
	-- we identified the right set of actions to take	1=6, 2=9, 3=2, 4=1, 5=0
4.6	As I make decisions two or three years from now, I will be employing some of what I have learned in the process (i.e. strategic thinking)	1=8, 2=10, 3=0 4=0, 5=0
4.7	Overall, the benefits of our doing strategic planning were well worth the budget we spent on the project	1=13, 2=2, 3=1 4=0, 5=2
4.8	Better results could have been achieved by some other means of planning or decision making	1=0, 2=1, 3=9 4=6, 5=2

4.9 How do you feel the thoughts and ideas expressed in the Strategy, and strategic planning in general, will influence future Council decisions? (check one only)

<u>5</u>	It will have substantial influence	<u>12</u>	It will have moderate influence
<u>1</u>	It will have little influence	<u>0</u>	It will have no influence

4.10 Looking back on the Workshops that you attended, and thinking about what the participants ended up producing, would you say that the end product (the issues addressed, suggested actions, Vision Statement) could have been better?

7 Yes 8 No

4.10.1 If you answered "yes", please describe a few things that could be changed to improve:

a) the process of creating the Economic Development Strategy

b) the quality and effectiveness of the Economic Development Strategy (i.e. the product)

4.11 Given what you just answered in question 4.10, do you think the Economic Development Strategy will be effective in bringing results to the community? (check one only)

<u>7</u>	It will be very effective	<u>0</u>	It won't change anything
<u>8</u>	It will be only somewhat effective	<u>0</u>	It has made things worse

4.11.1 Please explain your above response: _____

-See Responses at end of survey

4.12 As a result of your participation in the Economic Development Strategy, your commitment to community economic development has... (check one only)

<u>8</u>	Increased substantially	<u>1</u>	Decreased somewhat
<u>6</u>	Increased somewhat	<u>0</u>	Decreased substantially
<u>3</u>	Is unchanged		

Please Check: did you answer all the questions?
If you have any other comments, please feel free to write on the back of this page.
Again, thank-you. Your time is much appreciated.

Question 1.4 -- Positive or Negative Comments on the Process

- The time span to do the project was too short, thus workshops did not allow for ample time to think
- Very thorough and efficient means of identifying some very indefinite and diverse ideas
- Not all participants were able to attend all sessions. Possibly having a detailed schedule (dates) for all sessions and selecting people based on being able to attend all workshops would have been helpful
- It may have been helpful for the Project Coordinator to be allowed to follow through with the recommendations
- Try to avoid municipal election time. A number of people seemed uncertain of the purpose, value, and process of the "Visioning" Workshop. A pre-workshop session with group facilitators would likely improve it. I think a lot of people were surprised at the practical results that arose out of the seeming chaos of community issues.
- Sub-groups given specific tasks to achieve might have been more effective for the process
- Because of a lack of participant experience, more (leaders) within the workshop situation would have made things go smoother and more organized. The Workshop situation was hard for one person to run.

Question 4.10.1 a) and b) -- Suggested Improvements to the Strategic Planning Process and Product

4.10 a) The Process

- The process needs larger representation from the business community and the general public (clients of business)
- There was limited time allotted for each workshop. Workshops could have been lengthened to achieve an even better product
- Strong voices overcame other ideas
- Try to involve a broader cross-section of the community. I have a feeling that this particular process was driven by a very few vocal and determined individuals
- Throw out ideas to the community prior to documentation for a consensus

4.10 b) The Product

- The product was good, but like anything else could have been improved. It was excellent for the time allotted to develop it.

-What was needed was a clear call to action for Council. Looking back we should have said "here's the plan, here's our priorities and plan of action for 1993/94 - please approve"

-It failed to exploit the military presence and the economic spin-off jobs there will be in the future

-Try to get other town committees and community groups to buy-in and push (lobby) for reform

-Many of the players involved are already involved in the decision making of the community through their input on committees and services

4.11.1 -- Explanation of Response to Whether the Economic Development Strategy will be Effective in Bringing Results to the Community

-It won't be effective because goals in many cases are unrealistic

-It will be effective assuming we hire an Economic Development Officer to continue the work begun

-The Strategy provides a good solid starting point from which to build

-With a limited budget in future, Council will be slow to change and more forward on the ideals. They all ran on limiting tax increases

-There is better direction now as a result of the strategy, and on the issues that need to be addressed

-One large development in an unsuitable area has been directed to a more suitable area -- and resulting publicity will apparently bring in an appropriate development to the originally proposed area

-Ultimate effectiveness depends on the profile the EDC is given by Council

-It's hard to say how effective it will be until Council sorts itself out and finds its feet. A seasoned Council would have been a different story

-An effective strategy will only happen by the enthusiasm and commitment of key leaders in the community

-Old habits in the community are hard to get changed. The strategy is good, but it will take time to sink in

-Excellent groundwork plan but overlooks -- are we to be a resort community and the fiscal limitations of statements made tax supported?

Additional Comments

"When I saw your final presentation my thought was that the Town should have conducted such an exercise many years ago. It would have brought a sense of purpose which would have prevented some of the planning decisions which are having a negative impact on our present economic development. We should be able to avoid these problems in future, and I have given you one example (the proposed development moved to a more appropriate location) where this has already happened"

Councillor

"My evaluation is based on the Council presentation only. Based on this, I believe you (the Project Coordinator) and the process you encouraged have had and will have a significant impact on future Council deliberations. We are, in fact, taking preliminary steps to appoint a town employee to be a part-time EDO and we have encouraged the EDC to continue to provide advice on planning topics. Your work in Cold Lake will be remembered"

Councillor

"I appreciate the difficult task you (the Project Coordinator) had trying to develop an Economic Development Strategy in a town that was bordering on disaster. Hopefully the new Council, new administration, and a new corporate structure will be more effective in promoting economic development. At least we will now try our best"

Councillor

"The feedback I heard was all positive"

Councillor

"My commitment to community economic development has increased substantially as a result of my participation because I realize what could be and know now that we require a unified effort and focus"

Councillor

APPENDIX C
THE FINAL REPORT

TABLE OF CONTENTS - FINAL REPORT

- Summary
- Recommendations
- EDC Mission and Mandate
- Vision Statement -- "Vision 2020 -- Footsteps of the Future"
- Action Plan
- Summary of Strategic Planning Process Principles, and Workshop Participants
- Summary of Project Activities Completed
- Identified Issues and Critical Issues

The Final Report summarizes the results of the strategy process conducted in Cold Lake from June 15, 1992 to December 15, 1992. The content of the report reflects the completion of the project by an external consultant; the summaries and recommendations were designed to facilitate the implementation process after the Project Coordinator's departure from the community.

A copy of the report can be obtained from the Town Office, Town of Cold Lake, P.O. Box 8098, Cold Lake, Alberta, T0A 0V0, Ph: (403) 639-3351, Fax (403) 639-2510. Photocopy charges may apply.

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