

Final Report

Calgary Regional Partnership

10 Year Regional Economic Development Strategy

May 2009

Contents

1	Introduction.....	4
1.1	Objectives of this Project.....	5
1.2	Approach and Methodology.....	6
2	Situational Analysis	7
2.1	Regional Context	7
2.2	Economic Base Analysis	8
2.2.1	Population Growth.....	8
2.2.2	Population by Age	10
2.2.3	Educational Attainment	12
2.2.4	Household Income	13
2.3	Labour Force Characteristics	14
2.3.1	Labour Force by Industry	15
2.3.2	Labour Force by Occupation	20
2.3.3	Commuting Patterns.....	21
2.3.4	Growth in Business Establishments	22
2.4	Calgary Region’s Creative Economy.....	24
2.4.1	The Creative Economy Defined	24
2.4.2	Statistical Definition	25
2.4.3	The Creative Economy Revealed.....	26
2.5	Summary of Findings.....	28
3	Calgary Region SWOT Assessment.....	31
3.1	SWOT Results	32
3.1.1	Strengths	32
3.1.2	Weaknesses.....	33
3.1.3	Opportunities	34
3.1.4	Threats	35
3.1.5	Summary	35
4	Economic Development Capacity in the Calgary Region	36
4.1	Calgary Regional Partnership.....	36
4.1.1	Calgary Regional Partnership Economic Development	38
4.2	Economic Development Capacity of Member Municipalities.....	39
4.2.1	Calgary Economic Development.....	41
4.3	Community Futures Development Corporations (CFDC).....	43
4.4	Summary of Findings.....	44

5 Calgary Regional Partnership Economic Development Strategy 45

Appendices

Appendix I North American Industrial Codes System

Appendix II Calgary Region Creative Economy Establishments

Appendix III Focus Group Results

Appendix IV Interview and Focus Group Participant List

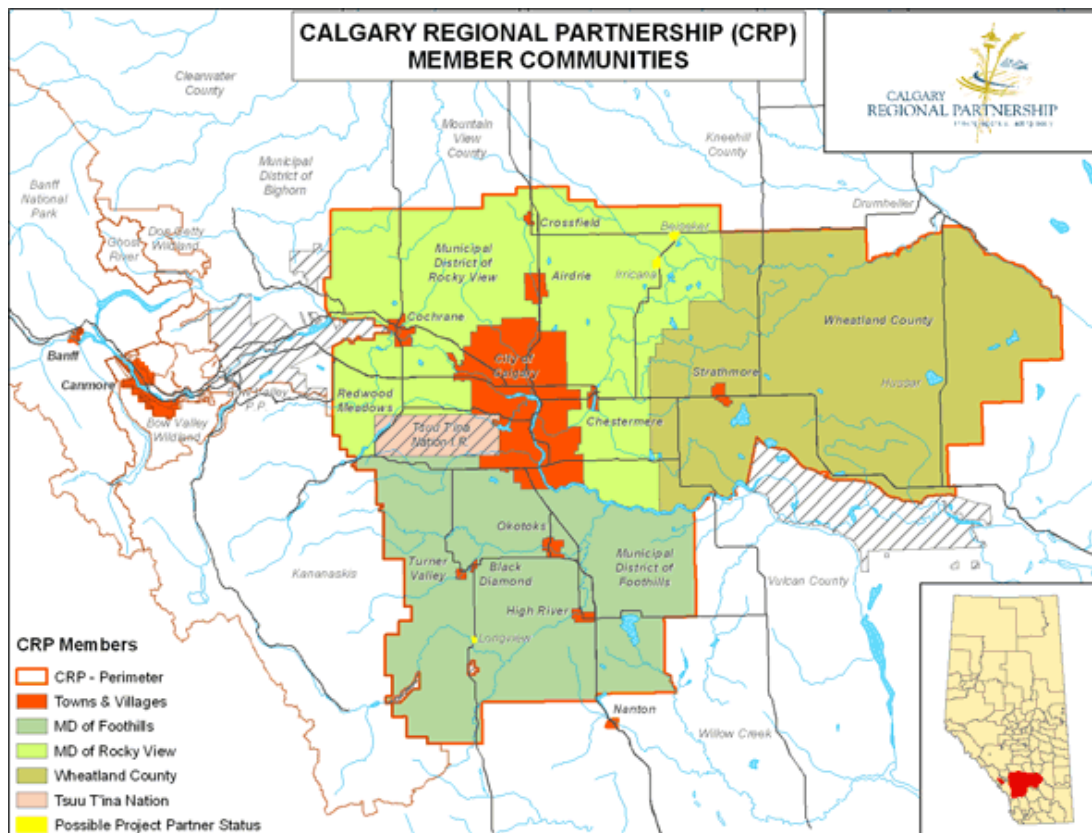
Appendix V CRP Members Economic Development Shared Priorities

1 Introduction

The Calgary Region (“the Region”) as defined by the Calgary Regional Partnership (CRP) boundaries (figure 1) has experienced a rapid period of growth in recent years. The expansion of the provincial and Calgary economies has had major impacts across the Region. The city of Calgary has seen significant growth in head office, financial services, professional engineering and other services that support the energy sector and oil sands development. The city’s transportation and logistics, aerospace and health care sectors are also expanding. This heightened level of economic activity has contributed to the growth of communities within the Calgary Region, which have experienced some of the highest rates of population and employment growth in the country, and the emergence of the Region as an attractive location for business growth and expansion. Despite the recent downturn in the global economy, the Calgary Region is seen as one of the most exciting and dynamic places in the country in which to live and do business.

In light of the impact that this growth is having on local municipalities and by extension the local geography, the Calgary Regional Partnership (CRP) Executive Committee has identified the need for a 10 year Regional Economic Development Strategy that will define and guide the economic development efforts of the organization and build upon the ‘economic prosperity’ component of the CRP’s current vision and mission for the Calgary Region. While economic development activity is ongoing in many communities across the Region including the City of Calgary, the CRP has identified the need for greater regional collaboration and coordination in the delivery of its economic development efforts.

Figure 1 – CRP Member Communities, February 2009



Source: www.calgaryregion.ca

Strategic planning of this nature is one of the most important tools that an economic development organization can use for effective development. It is a means for establishing and maintaining essential services and programs based on economic opportunities, constraints and the needs of a community or region, within the resources available. It also:

- helps to shape a community or region's future;
- provides structure for mutually accepted goals and a common agenda;
- defines the purpose of the region at large and its role in achieving stated goals; and
- balances goals and objectives with available resources.

Millier Dickinson Blais has been contracted by the Calgary Regional Partnership to prepare an action oriented and innovative economic development plan that would guide the economic development activities of the Partnership for the next ten years taking into account the ongoing work of the organization, as well as the individual economic development efforts of the CRP member municipalities. In particular, the city of Calgary has recently adopted an economic development strategy that will have far reaching implications for the region's efforts at business investment attraction and marketing.

To ensure the effective and efficient implementation of a regional economic development strategy, the CRP has also addressed the need for a revised organizational mandate and governance model that clearly articulates the role of the Partnership in the delivery of economic development services in the Calgary Region.

1.1 Objectives of this Project

To date, many of the CRP key priorities have revolved around land and servicing issues. Recently, however, there has been an acknowledgement that economic development should no longer be project based, rather it should be grounded in a long term economic development strategy that delivers year over year results. The strategy is intended to benefit the entire region and as such, must reflect the viewpoints of the many different stakeholder groups affected and contributing to the economic health of the Region.

Broadly speaking, the objectives of the Economic Development Strategy include:

1. Identifying potential opportunities that arise from the City of Calgary's recently completed Economic Development Strategy and identifying opportunities for synergies and partnerships with the CRP.
2. Identifying flagship initiatives that require regional collaboration and provide recommendations that assist in addressing governance, structure, communications and relationships within the stakeholder group.
3. Completing a SWOT analysis of the Calgary Region (with particular emphasis upon the urban and rural areas outlying the city) and provide recommendations as to how best capitalize on both existing and emerging opportunities and mitigate threats to growth and investment.
4. Identifying and consulting with economic development partners that play a role in the implementation of these objectives and identifying opportunities and a methodology for the broader involvement of the private sector in the affairs of the Calgary Region.
5. Enabling the development of an implementation plan that provides a methodology for evaluating and prioritizing possible action items, defines responsibilities and timelines for effective

implementation and includes performance indicators that provide insight and understanding as to the economic health of the region.

6. Providing guidance on how to achieve/create complete communities and identifying strategies the CRP can implement from a labour force retention and attraction perspective.

1.2 Approach and Methodology

The fundamental goal of an economic development strategy is to improve the livability and quality of life of a community or region through sustained economic growth, the result of which is the creation of high quality jobs, as well as wealth and sustained investment.

To achieve this, many economic development organizations are taking on new roles and responsibilities in recognition of the impact of a global economy. Economic development continues to include traditional programs such as business attraction and retention, but also new programs that foster skills development, entrepreneurship, mentorship, risk financing, technology transfer, product commercialization, and immigrant attraction. In addition, the use of information and communications technology for economic development and city-building are also emerging as essential tools for advancing economic development.

The approach employed in developing this strategy has involved the following steps:

1. An environmental scan and literature review of available data, reports, studies, and economic development strategies considered relevant to the completion of this strategy.
2. Community consultation in the form of 5 focus group sessions and 40 stakeholder interviews with key business and community leaders from across the Region, as well as local and provincial officials who are able to provide further insight into the trends and issues related to the Region's socio-economic make-up, historic economic development and service delivery and the competitive positioning of the Region.
3. The development of a current economic profile for the Calgary Region that highlights key patterns of change in relation to a variety of key variables.
4. A SWOT assessment based on the results of an interview program and environmental scan to further refine and finalize the Region's key economic sectors and provide input into the type and form of economic development services best suited to a regional delivery model.
5. A review of economic development delivery models and governance structures across a range of organizations to determine the most effective structure for the delivery of economic development services in the Calgary Region.

The result is an economic development strategy that is both strategic and practical and positions the Calgary Region Partnership to best respond to the economic opportunities that will ensure the growth and sustainability of the region in the future.

2 Situational Analysis

2.1 Regional Context

For nearly a century, Alberta has been Canada's oil and gas capital. In recent years, the strong global demand for energy has resulted in the expansion of the provincial economy, with Alberta having had the highest rate of GDP growth in Canada for the last five years. Alberta's strong growth is attributed mainly to the abundance of natural resources, which inevitably supports the overall success of the province. Alberta's real GDP was equal to \$258.9 billion¹ in 2007 making it one of the greatest wealth generators in the country. Oil and Gas accounted for 27.7% of GDP growth followed by Finance & Real Estate (13.8%) and Construction (9.0%)².

Alberta's increase in investment from 1996 to 2006 far exceeded Canada, with a percentage change value of 172.5 percent as compared to the Nation's percentage change of 91.8 percent.³ The province continues to have an attractive investment climate with total investment in Alberta (capital expenditures) projected to be \$74.8 billion in 2009. Much of this investment will be in the Oil & Gas sector (\$28.4 billion), followed by the Non-Energy sector (\$23.5 billion), the housing sector (\$12.3 billion) and the Institution sector (\$10.6 billion).⁴

In this context, the Calgary-Edmonton Corridor has emerged as one of the strongest economies in North America, if not the world. Fuelled by growth in the province's energy sector it has posted some of the strongest gains in both real GDP and population increases on the North American landscape. What this means for those living in the corridor, generally comprising the Greater Edmonton region in the north and Greater Calgary region in the south, is that they are living in the only large Canadian urban region that has been able to amass a U.S. style level of wealth while maintaining a Canadian-style quality of life.

In recent years, businesses and individuals have flocked to this region of the province to take advantage of the considerable market opportunities that have emerged, while benefiting from low taxes and business costs, the vast wealth of natural resources, low crime rates, a high-quality education system, a clean environment and a wealth of recreational and cultural experiences. Given all of these assets, the Corridor has enormous potential not only to become an economic engine but also one of the most prosperous and best places to live on the continent. This position provides the city of Calgary and the Region with potential to leverage off the region's performance to promote and effectively position the Calgary Region for business investment and growth.

With Calgary's position as the energy capital of Canada firmly entrenched, and the Region's central location at the crossroad of the main north-south and east-west rail and highway transportation corridors, the regional economy is expected to benefit significantly from the recovery of the North American economy. The city and the Region are unrivalled in the concentration of professional and technical service providers to the oil and gas sector as well as other industries and the success of the energy sector has contributed to the emergence of Calgary as a business and finance services centre and a prime head office location for global companies. This in turn has created business and investment opportunities in the communities that comprise the Calgary Region Partnership.

¹ In 2007 current dollars

² Source: Alberta Economic Quick Facts, November 2008

³ Source: Statistics Canada and Alberta Finance and Enterprise

⁴ Source: Highlights of the Alberta Economy, Alberta Finance & Enterprise, 2009 (based on 'Intentions')

The section to follow provides a more detailed understanding of the current strengths of the Calgary Region and uses data related to demographics, labour force and industry composition to demonstrate its growth potential.

2.2 Economic Base Analysis

A cornerstone to developing an economic development strategy regardless of the size of a community or region is an understanding of the jurisdiction in terms of its assets – business base, labour force, quality of life etc. – as well as its potential for economic growth. The discussion that follows provides an understanding of the current and historical economic performance of the Calgary Region (as defined).

For the purposes of this report, the Calgary Regional Partnership's (CRP) member communities and municipal districts are referred to as the Calgary Region. Where possible the city of Calgary has been extracted from the Calgary Region's data calculations to better illustrate the Region's overall performance in terms of key economic indicators. It should be noted that the Tsuu T'ina Nation and the Townsite of Redwood Meadows have not been included in this analysis as their legislative status is substantially different from the rest of the partnership communities, making it inherently difficult to obtain comparable data.

The analysis is comprised of three elements: the first element reviews demographic characteristics of the region and observes population trends, educational attainment levels and household income values as compared to the City of Calgary and in some cases the province of Alberta or Canada. The second element describes current labour force characteristics and key industry performance and target sector opportunities. The third element is a discussion of the emergence of the creative class of worker, a trend that has significant implications for the manner in which many communities are now structuring their economic development and workforce attraction efforts.

In completing this report, Millier Dickinson Blais has made use of available 2006 Census information for each of the member communities and municipal districts, along with 2003 and 2008 business growth information obtained from Canadian Business Patterns Data (Statistics Canada). Where possible the report has included data that was previously obtained and analysed by the consulting firms EcDev Solutions Ltd., and JWP Strategy International Inc. in the completion of a 2007 economic base analysis and subsequent industry sector analyses for the region. It should be noted that there are some inconsistencies in the reporting of data, as some data has included the City of Calgary while other work has excluded the municipality. This is noted, as appropriate.

2.2.1 Population Growth

Population growth is a strong indicator of a community's economic viability. As of the 2006 census, the Calgary Region had a population of 180,922 an increase of 23.6% since 2001 (figure 2). The rate of increase from 1996 to 2006 suggests the population has grown by 28.6% over this 10 year period.

When consideration is given to the rate of growth in the City of Calgary and the province as a whole over the period 2001 to 2006, the data confirms that the Calgary Region (excluding the city of Calgary) is growing at a faster rate (approximately double) than either the city of Calgary or the province, which over the period grew at rates of 12.4% and 10.6% respectively.

This can be attributed to a variety of factors – the availability and cost of housing, perceived quality of life, and employment considerations.

Figure 2 - Population: Calgary Region & Comparison Communities (1996 – 2006)

Total Population	Calgary Region	City of Calgary	Alberta
Population in 2006	180,922	988,193	3,290,350
Population in 2001	146,352	879,003	2,974,807
Population in 1996	113,786	768,082	2,696,826
2001 to 2006 population change (%)	23.6%	12.4%	10.6%
1996 to 2001 population change (%)	28.6%	14.4%	10.3%

Source: Statistics Canada: Census 1996, 2001 & 2006

Figure 3 below illustrates the population growth among the major municipalities⁵ of the Calgary Region. Based on this information these communities have experienced an increase in their population, on average a rate of 33.8% between 2001 and 2006 and a remarkable 93.6% over the longer term (since 1996). These results provide further evidence of the popularity of these communities to residents and newcomers to the Region.

Figure 3 - Population by Major Municipalities (2006)

Name	2006		2001		1996		2001-2006	1996 - 2006	Net Increase
	Population	Population	Population	Population	Population	(5 Years)	(10 Years)		
						% Change	Net Increase	% Change	
M.D. of Rocky View	34,171	29,925	23,326	14.2%	4,246	46.5%	10,845		
Airdrie	28,927	20,407	15,946	41.8%	8,520	81.4%	12,981		
M.D. Of Foothills	19,736	16,602	14,349	18.9%	3,134	37.5%	5,387		
Cochrane	13,760	12,041	7,424	14.3%	1,719	85.3%	6,336		
Okotoks	17,145	11,689	8,510	46.7%	5,456	101.5%	8,635		
Canmore	12,039	10,792	9,015	11.6%	1,247	33.5%	3,024		
Strathmore	10,225	7,621	5,273	34.2%	2,604	93.9%	4,952		
High River	10,716	9,383	7,359	14.2%	1,333	45.6%	3,357		
Banff	6,700	7,135	6,098	-6.1%	-435	9.9%	602		
Chestermere	9,654	3,856	1,911	148.0%	5,708	400.5%	7,653		

Extract from Regional Economic Indicators Calgary Region, Alberta Employment, Immigration and Industry

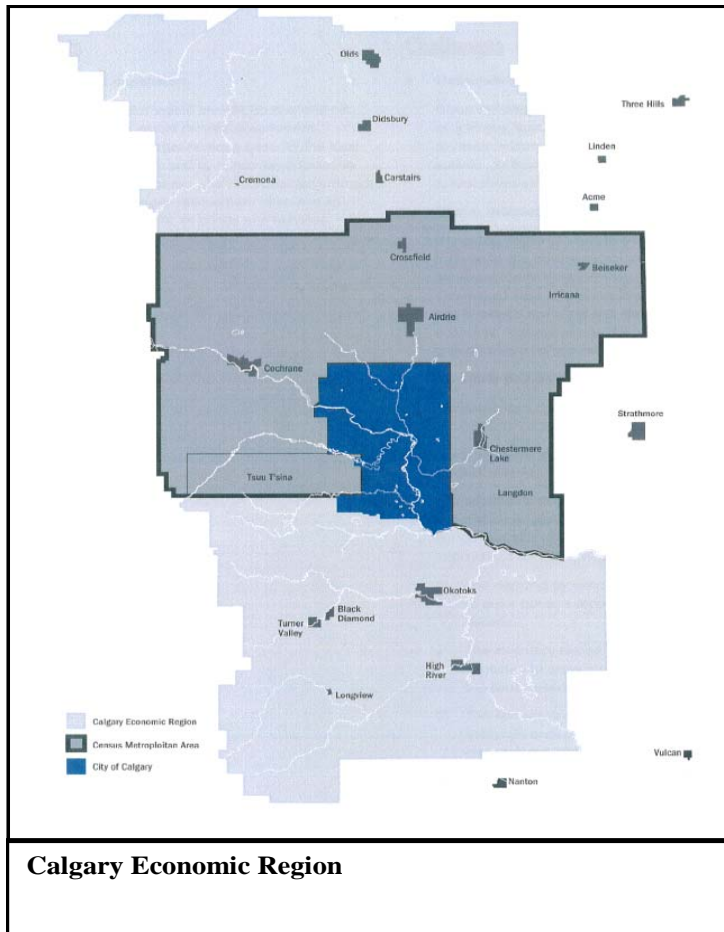
Source : Statistics Canada, Census 1996, 2001, 2006

Not surprisingly, given their proximity to the city of Calgary, the highest population growth has been experienced in Chestermere, Okotoks and Airdrie. On a per annum basis, since 2001 the population in these communities has increased by 29.6%, 9.3% and 8.4% respectively. From 2001 to 2006, the greatest population growth occurred in Chestermere which increased from 3,856 to 9,514 or 148.0%.

In August 2008, the Corporate Economics section of the City of Calgary produced its “Calgary and Region Socio-Economic Outlook 2008 – 2013”. This is a regular publication from the City of Calgary that reviews the historic economic changes throughout the city of Calgary and the Calgary Economic Region (CER) and provides an economic outlook for the future. While the CRP represents a larger geographic region than the CER (see figure 4), the implications associated with recent and anticipated economic changes will be felt across the CRP municipalities.

⁵ Major municipalities have been identified in the Calgary Regional Profile released in January 2008 by CRP. Each municipality identified in figure 3 has a geographic description of a town, city or municipal district.

Figure 4 – Calgary Economic Region



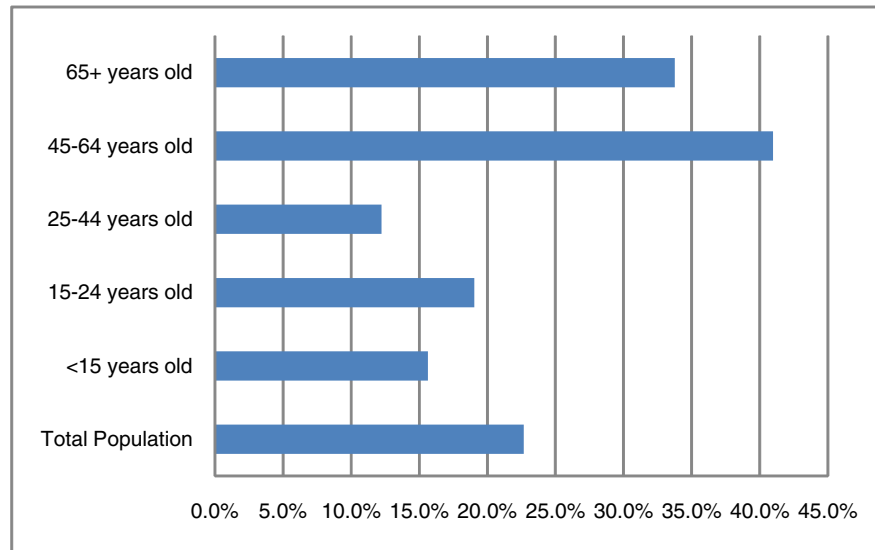
Based on the City of Calgary report, the CER had an estimated population of 1.252 million in 2008 and is expected to increase to 1.395 million by 2013, an increase of 11.6% over the period. Net in-migration is expected to remain the major source of population growth over the forecast period, with natural increase to population expected to decline over the forecast period. Given the significant rate of historic growth in the Calgary Region (exclusive of Calgary), it is reasonable to assume that a significant portion of this projected population growth will occur in those same communities.

This unprecedented level of population growth in the city and the CER however, has heightened demand for municipal services in the form of housing, infrastructure, schooling, and social services, etc. In the future this may also include a greater level of services specific to an immigrant and aging population.

2.2.2 Population by Age

While the population in the Calgary Region remains concentrated in the age cohorts of 25-44 and 45-64 years of age, much of that growth has come from the 45-64 age group with a percentage increase of 41.0% from 2001 to 2006 (figure 5).

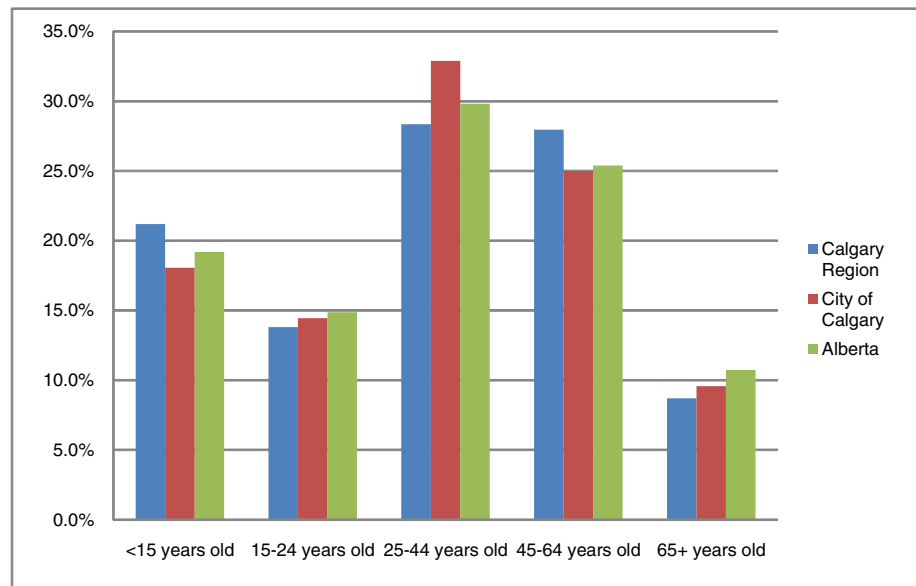
Figure 5 – Percentage Change: Calgary Region, Age Profile (2001 – 2006)



Source: Statistics Canada, Community Profiles: 2001 & 2006

The following figure provides a further understanding of how the Calgary Region is performing comparatively to the city of Calgary and the province. Most notably, the Calgary Region has the highest percentage of its population concentrated in the 25-44 years of age cohort (28.3%) and the 45-64 years (28.0%) age cohort. The concentration of population in the 45-64 year age group coupled with the high percentage of population that is under 15 years of age suggests the popularity of the region for families.

Figure 6 – Age Profile by Percent: Calgary Region, City of Calgary, Alberta (2006)



Source: Statistics Canada, Community Profiles: 2006

A study conducted by the Canadian Policy Research Networks in 2006⁶ suggests that while the City of Calgary currently enjoys a slightly younger population than the country overall, the average age of Calgarians will soon rise. It is projected that over the next 30 years, population growth will be most pronounced among adults over the age of 44 years. Currently, the Calgary Region has the highest percentage of adults aged 45 to 64 years, but it is expected that the city of Calgary's figures will increase from 23% in 2006 to 28% in 2033, an estimated 126,000 additional people in this age cohort. This pattern of proportionately fewer young persons and a greater number of older persons will become characteristic of geographies across Canada and it is important to recognize that similar trends will also impact the Calgary Region. When reviewing the results of the CER analysis, the age structure of the population is also expected to shift to an aging population. Nearly 38,000 people are expected to move into the age cohort of 55-64 years during the forecast period.

The shift in demographics will continue to have implications for the Region's labour force capacity. While the younger age cohorts still show signs of growth, an aging population will result in further reliance on the recruitment of employees from outside the community. This trend has the potential to be offset by an increasing number of births among immigrants and Aboriginal peoples who are, on average, younger than the rest of the population.

2.2.3 Educational Attainment

The educational levels attained by a resident population also have implications for the growth of the local economy and whether its labour force will be seen as attractive to business and industry. In 2006, 45.4% of the population in the Calgary Region had attained some level of post-secondary education as compared to 48.0% in the city of Calgary, 39.5% across Alberta and 39.8% in Canada. The high level of educational attainment in the Region confirms the attractiveness of the area for business investment and entrepreneurial growth.

Figure 7 illustrates the current educational attainment levels for the population 15 years and older in the Calgary Region, the city of Calgary, Alberta and Canada. The largest proportion of the population in the Calgary Region holds a high school certificate or equivalent (25.5%), followed by university certificate, diploma or degree (23.7%) and no certificate; diploma or degree (18.3%). The city of Calgary also has a high rate of its total population with a high school certificate or equivalent (25.6%), which is just below the provincial average of 26.2%.

Figure 7 – Educational Attainment- Population 15 years and older Calgary Region, City of Calgary, Alberta (2006)

	Calgary Region		City of Calgary		Alberta		Canada	
	Population	% of total	Population	% of total	Population	% of total	Population	% of total
Total population 15 years and over	141,855	100.0%	801,265	100.0%	2,625,145	100.0%	25,664,220	100.0%
No certificate; diploma or degree	27,390	18.3%	145,125	18.1%	614,865	23.4%	6,098,325	23.8%
High school certificate or equivalent	38,835	25.5%	205,115	25.6%	688,140	26.2%	6,553,425	25.5%
Apprenticeship or trades certificate or diploma	15,905	8.6%	66,275	8.3%	285,815	10.9%	2,785,420	10.9%
College or other non-university certificate or diploma	28,935	17.9%	141,945	17.7%	472,210	18.0%	4,435,135	17.3%
University certificate or diploma below the bachelor level	5,960	4.8%	40,135	5.0%	105,680	4.0%	1,136,145	4.4%
University certificate; diploma or degree	24,795	23.7%	202,670	25.3%	458,425	17.5%	4,655,770	18.1%

Note: Numbers may not total due to rounding

Source: Statistics Canada 2006 Census

The Calgary Region and the city of Calgary also have a high percentage of residents with a university certificate; diploma or degree (23.7% and 25.3% respectively) when compared to both the provincial and national averages. This observation is supported by a recent Maclean's magazine article, which reviewed

⁶ Source: CPRN – Demographic Trends and Implications for the City of Calgary, April 2006

2006 census numbers and identified Alberta as having greatly benefitted from an increase in mobility of Canada's highly educated population. From 2001 to 2006, Alberta experienced a net increase of 28,000 post-secondary graduates, with the majority coming from the neighbouring province of Saskatchewan. An additional 7,200 came from Ontario and 6,575 from the Atlantic Provinces.⁷

2.2.4 Household Income

Figure 8 demonstrates the change in individual income levels in the Calgary Region from 2000 to 2005. During this time period, the number of households⁸ with less than \$50,000 decreased in number, from 17,925 to 17,850, however as a proportion of the total households in the region this dropped from 36.0% to 28.1%.⁹ A review of city of Calgary's performance suggests that while there was a similar decrease in the number of low income households (down to 137,250 from 140,900), they did not see a large a reduction in percentage terms, with low income household declining from 42.5% of total households in 2000 to 35.7% in 2005.

Figure 8 – Income Characteristics by Household, Calgary Region & City of Calgary (2000 & 2005)

	Calgary Region				City of Calgary			
	2000		2005		2000		2005	
Total Number of Households	49,735	100	63,475	100	332,960	100	384,745	100
Households with Income under \$10,000	1415	2.8%	1490	2.3%	14,030	4.2%	13,055	3.4%
\$10,000 - \$19,999	3,045	6.1%	2,720	4.3%	27,450	8.2%	25,220	6.6%
\$20,000 - \$29,999	4,070	8.2%	3,860	6.1%	30,935	9.3%	28,435	7.4%
\$30,000 - \$39,999	4,525	9.1%	4,810	7.6%	34,315	10.3%	35,670	9.3%
\$40,000 - \$49,999	4,870	9.8%	4,970	7.8%	34,170	10.3%	34,870	9.1%
\$50,000 - \$59,999	4,905	9.9%	4,770	7.5%	31,750	9.5%	33,105	8.6%
\$60,000 - \$69,999	4530	9.1%	5245	8.3%	29,670	8.9%	30,380	7.9%
\$70,000 - \$79,999	4455	9.0%	4880	7.7%	25,295	7.6%	27,420	7.1%
\$80,000 - \$89,999	3660	7.4%	4330	6.8%	21,145	6.4%	24,085	6.3%
\$90,000 - \$99, 999	2660	5.3%	3885	6.1%	16,215	4.9%	20,840	5.4%
\$100,000 and over	11,625	23.4%	22,470	35.4%	67,975	20.4%	111,650	29.0%

Source: Statistics Canada: 2001 & 2006 Census

The Calgary Region has also experienced a significant increase in the number of high income households (\$100,000 and over) in the community. In 2005, the number of private households earning in excess of \$100,000 comprised 35.4% of all households, an increase of 12.0 % from 2000 levels. While these figures appear to be high when compared to other regions of the country, it is important to note Alberta's increasingly high average wage rate. This is also reflected in the average wages. As of 2006, Alberta held the highest average hourly wage rate in Canada, which rose by 6.9% to \$21.12.¹⁰ ¹¹These figures were recorded as the largest year-over-year increase in the province in nearly 30 years. The province's average hourly wage rate rose to \$23.90 by the end of 2007 as compared to Canada's average rate of \$20.41 per hour.¹²

⁷ Source: Alberta or Bust! Macleans.ca, March 4th, 2008 – online edition

⁸ Figures calculated based on Household Income in Constant (2000) and (2005) Dollars. Positive or negative dollar value or nil are recorded as responses

⁹ Households earning less than \$50,000 annually

¹⁰ Alberta's combined average hourly wage for full-time and part-time employees

¹¹ Source: Canada-Alberta Labour Market Agreement 2008/2009 Annual Plan

¹² Source: Statistics Canada, Labour Force Survey, program A020908

This high household income and high average wage rates, however, are in part driven by the high cost of living in the region. The cost of living in Calgary, as measured by the Consumer Price Index (CPI), has increased from 119.10 in 2008 to the highest in Canada at 121.9 in February of 2009¹³.

Figure 9 – Consumer Price Index, by select city (monthly)

	Feb-08	Jan-09	Feb-09	January 2009 to February 2009	February 2008 to February 2009
	2002 = 100			% change	
Montréal (Que.)	111.30	111.70	112.40	0.60	1.00
Toronto (Ont.)	111.30	112.50	113.20	0.60	1.70
Winnipeg (Man.)	111.10	112.30	113.00	0.60	1.70
Regina (Sask.)	112.70	115.60	116.40	0.70	3.30
Saskatoon (Sask.)	115.00	116.90	117.80	0.80	2.40
Edmonton (Alta.)	118.70	120.20	121.50	1.10	2.40
Calgary (Alta.)	119.10	120.70	121.90	1.00	2.40
Vancouver (B.C.)	110.70	112.00	112.50	0.40	1.60
Victoria (B.C.)	109.80	111.00	111.40	0.40	1.50

Source: Statistics Canada, 2006 : Catalogue no. 62-001-X

While the increase in the cost of living may not affect high income earning households as significantly as lower income households, the Region's high cost of living may impact the Calgary Region's ability to attract and retain workers at lower income levels and place greater demands on social service agencies, resulting from increased shelter, transportation and food costs. The 2008 Calgary and Region Economic and Socio-Outlook suggests that between 2008 - 2013, the cost of housing will moderate due to slower population growth during the forecast period, which is expected to have a mitigating effect on the region's cost of living in the short term.

2.3 Labour Force Characteristics

An additional factor for indicating a community or region's economic health is labour force performance. From 2001 to 2006 the size of the resident labour force in the Calgary Region increased by 25.0% to 109,250 persons¹⁴, which suggests a strong regional economy. The Region also recorded an average unemployment rate of 2.7%¹⁵ in 2006, compared to 4.1% in the city of Calgary. It must be noted however, that the low unemployment rate in the Calgary Region is due in part to the employment opportunities provided by the city of Calgary and the degree to which people in the Region commute to work in the city. Both the Region and the city out-performed the province in 2006, which was reported as having an unemployment rate of 4.3 percent. However, with the recent downturn of the global economy the province has experienced an increase in its unemployment rate. The 2008 Calgary and Region Economic and Socio-Outlook reported that the CER's unemployment rate was projected to be 3.2% in 2008 and it was anticipated to remain between 3.0 and 4.0% over the forecast period.¹⁶

¹³ Statistics Canada, Consumer Price Index, by City: CANSIM Table 326-0020 and Catalogue nos. 62-001-X and 62-010-X.

¹⁴ In the labour force calculation includes: both industry- not applicable and all industries labour force 15 years and over by industry as defined by Statistics Canada

¹⁵ In order to calculate the Calgary Region's participation, employment and unemployment rate an average was calculated based on the rates of all member communities

¹⁶ City of Calgary Land Use & Policy Department, Executive Summary of Calgary and region Socio Economic Outlook 2008-2013

As of March 2009 however, the unemployment rate for the province had increased to 5.8%, the highest in almost six years. This compares to 4.9% in the city of Calgary and 5.8% in the Calgary Region. While an increase in the unemployment rate is a concern, this may provide some relief to local employers who have experienced significant labour shortages in recent years.

It should be noted that the majority of job losses since October 2008 have occurred in the construction and manufacturing industries, a trend that is playing out in other regions of the country and in the U.S.¹⁷ The downturn of these sectors is attributed to a softened global demand due in part by rising fuel costs and lower levels of demand for single family dwellings in both Canada and the U.S. More recently the economy has started to see layoffs in the oil and gas industry, as a result of the significant drop in the price of oil.

2.3.1 Labour Force by Industry

In 2006, Calgary Region's labour force was comprised of 108,850¹⁸ people, an increase of 25.0% over 2001. Based on the 2006 census, the regional economy was concentrated in the following sectors: Construction (10.5%), Retail Trade (9.4%), Professional, Scientific and Technical Services (8.4%), Accommodation and Food Services (7.7%) and Health Care & Social Assistance (7.2%). Notwithstanding these results, the following sectors have shown the most marked percentage increase from 2001 to 2006:

- Real Estate and Rental and Leasing (14.4% increase)
- Public Administration (13.1% increase)
- Other Services (except Public Administration) (11.2% increase)
- Finance and Insurance (11.1% increase)
- Educational Services (8.0% increase)

It should be noted that these labour force numbers represent a total labour force picture for the Calgary Region and does necessarily reflect local employment opportunities.

As discussed in section 2.3.3 of the report, there is a significant portion of the Calgary Region's labour force that commutes to the city of Calgary daily for employment. There is also a portion of the city's labour force that travel into communities such as Airdrie, Okotoks and Cochrane for employment.

One of the challenges that the Calgary Region faces in driving sustainable long term employment growth is the fact that the labour force in the region is extremely mobile. This puts pressure on all levels of government to provide for an adequate transportation and transit system that allows the effective and efficient movement of workers.

It is equally important that the CRP together with its member municipalities respond to opportunities that enable employment growth within the Region. This can take the form of providing a steady supply of suitable employment land that responds to the current and merging demands of business and industry, as well as the targeted attraction of select business and industry that builds on the strengths and assets already present in the Calgary Region.

¹⁷ Statistics Canada, *Labour Force Information* Catalogue no. [71-001-XWE](#): 2009

¹⁸ Number excludes category entitled, industry-not applicable, labour force 15 years and over by industry as defined by Statistics Canada

Figure 10 – Labour Force by Industry, Calgary Region (2001 & 2006)

Industry Sector	Labour Force		Labour Force Change (Number)	Proportion (% of total labour force)			Location Quotient	
	2001	2006		2001	2006	Change	2001	2006
All Industries (NAICS) Total Labour Force	86,885	108,850	21,965	100.00%	100.00%	0.00%	-	-
11 Agriculture, forestry, fishing and hunting	5,825	5,950	125	6.70%	5.47%	-22.65%	1.33	1.39
21 Mining and oil and gas extraction	3,725	6,425	2700	4.29%	5.90%	27.37%	0.84	0.85
22 Utilities	690	1,010	320	0.79%	0.93%	14.41%	0.98	0.99
23 Construction	7,765	11,385	3620	8.94%	10.46%	14.55%	1.16	1.19
31-33 Manufacturing	6,725	7,090	365	7.74%	6.51%	-18.83%	0.96	0.91
41 Wholesale trade	3,700	4,535	835	4.26%	4.17%	-2.21%	0.95	0.94
44-45 Retail trade	8,770	10,225	1455	10.09%	9.39%	-7.45%	0.93	0.88
48-49 Transportation and warehousing	5,240	6,015	775	6.03%	5.53%	-9.14%	1.10	1.08
51 Information and cultural industries	1,965	1,880	-85	2.26%	1.73%	-30.94%	0.97	0.93
52 Finance and insurance	2,385	3,215	830	2.75%	2.95%	7.06%	0.86	0.96
53 Real estate and rental and leasing	1,615	2,495	880	1.86%	2.29%	18.91%	1.02	1.17
54 Professional, scientific and technical services	6,805	9,145	2340	7.83%	8.40%	6.78%	1.11	1.11
55 Management of companies and enterprises	190	160	-30	0.22%	0.15%	-48.77%	1.98	1.10
56 Administrative and support, waste management and remediation services	3,245	4,035	790	3.73%	3.71%	-0.75%	0.98	1.00
61 Educational services	4,670	6,090	1420	5.37%	5.59%	3.93%	0.83	0.90
62 Health care and social assistance	5,935	7,865	1930	6.83%	7.23%	5.46%	0.77	0.80
71 Arts, entertainment and recreation	2,490	3,140	650	2.87%	2.88%	0.65%	1.49	1.53
72 Accommodation and food services	8,465	8,400	-65	9.74%	7.72%	-26.25%	1.34	1.17
81 Other services (except public administration)	3,825	5,575	1750	4.40%	5.12%	14.05%	0.90	1.00
91 Public administration	2,830	4,055	1225	3.26%	3.73%	12.57%	0.71	0.80

Source: Statistics Canada 2001 and 2006

*Note: totals may not add up due to rounding by Statistics Canada

In completing an assessment of the Region's business and industrial base, it is appropriate to consider the performance of the sectors noted in figure 10 relative to a larger economic region. This in turn provides a better understanding of the growth and export potential associated with a local or regional economy.

In this regard, the CRP has undertaken a range of studies to ascertain the growth potential of the Calgary Region's economy. In February 2007, EcDev Solutions completed a Sustainable Investment Attraction Strategy for the Calgary Region. The purpose of the project was to identify sectors and subsectors and provided the CRP with a degree of understanding as to their regional investment attraction potential. These sectors/subsectors included:

- **Agri/Food Processing**
- **Advanced Wood Products Manufacturing**
- **Building Products Manufacturing**
- **Professional & Technical Services**
- **Warehousing, Distribution & Logistics**
- **Tourism Investment**

Additional work was also completed by EcDev Solutions Ltd. in association with JWP Strategy International Ltd. and EDP Consulting to identify potential investment attractions opportunities for each of the subsectors listed above. Figure 12 presents the subsectors identified by EcDev Solutions which included an in depth review and analysis of industry sector priorities of Calgary Economic Development (CED) and the then Alberta Economic Development department (AED). Additional information surrounding the "clusters" identified in the C-Prosperity initiative (2001), undertaken in the Calgary Region were also used to inform the recommendations of the sectors. The rationale supporting the competitive position of each sector is provided in the figure 11.

Figure 11 – Identified Sectors by EcDev Solutions: Calgary Regional Partnership Sustainable Investment Attraction Strategy Final Report (August 2007)

Industry	Professional Services	Food Manufacturing
	<ul style="list-style-type: none"> This sector has exhibited the fastest average annual growth rate in the region at 16.2%, far in excess of overall regional growth. 	<ul style="list-style-type: none"> Manufacturing, of which food manufacturing is the second largest subsector, created 1,380 new jobs in the region over the period. This translates to an average annual growth rate of 6.7% - greater than overall growth in the Region of 5.5%.
	<ul style="list-style-type: none"> This sector has created 1,430 new jobs over the 5 years, the second largest number in the region. 	<ul style="list-style-type: none"> The Food manufacturing sub-sector created 450 new jobs, almost 33% of all new manufacturing jobs in the Region. This translates to an average annual growth rate of 5.7% - again greater than the overall Regional growth rate.
	<ul style="list-style-type: none"> At 1.7% this sector has experienced the greatest change in its contribution to overall regional jobs, making it relatively more important. 	<ul style="list-style-type: none"> The region already supports firms with more than 200 employees in the sub-sector.
	<ul style="list-style-type: none"> The largest number of new businesses, by sector, was created in this sector. 	<ul style="list-style-type: none"> The Food manufacturing sub-sector could be strongly supported by the abundant agricultural inputs available in the Region. The Agricultural subsector has a location quotient of 3.51, indicating a strong export orientation. These raw inputs could be further processed in the Region.
	<ul style="list-style-type: none"> The region already supports a number of firms in this sector that have more than 200 employees. 	<ul style="list-style-type: none"> Food manufacturing is a declared priority area for both Calgary and Alberta.
	<ul style="list-style-type: none"> This sector and a number of its sub-sectors are declared priorities of both Calgary and Alberta. 	
Industry	Wood Products	Non-Wood Building Products
	<ul style="list-style-type: none"> Manufacturing, of which Wood Products Manufacturing is a significant sub-sector, created 1,380 new jobs in the region over the period. This translates to an average annual growth rate of 6.7% - greater than overall growth in the Region of 5.5%. 	<ul style="list-style-type: none"> Manufacturing, of which Non-Wood Building Products manufacturing is a sub-sector, created 1,380 new jobs in the region over the period. This translates to an average annual growth rate of 6.7% - greater than overall growth in the Region of 5.5%.
	<ul style="list-style-type: none"> The Wood Manufacturing sub-sector created 150 new jobs over the period, 11% of all new manufacturing jobs. This translates to an average annual growth rate of 7.0% - greater than the overall growth rate in the Region. 	<ul style="list-style-type: none"> The Non-Wood Building Products sub-sector could provide inputs to the very strong Regional Construction industries. Construction industries in the region have grown, on average, by 10.9% per year – far exceeding the 5.5% overall average annual growth rate of the Region.
	<ul style="list-style-type: none"> The Wood Manufacturing sub-sector could provide inputs to the very strong Regional Construction industries. Construction industries in the region have grown, on average, by 10.9% per year – far exceeding the 5.5% overall average annual growth rate of the Region. 	<ul style="list-style-type: none"> The region supports one firm with over 200 employees in this sub-sector, as well as a number of firms in the Construction industries – potential customer firms.
	<ul style="list-style-type: none"> The region already supports firms with more than 200 employees in this sub-sector, along with a number of large firms in the Construction industries – potential customer firms. 	<ul style="list-style-type: none"> Construction and Building Products are both priority industries for Alberta.
	<ul style="list-style-type: none"> Construction and Building Products are both priority industries for Alberta. 	
Industry	Transportation, Warehousing and Logistics	Tourism Investment
	<ul style="list-style-type: none"> The combined Transportation & Storage and Wholesale Trade industries created 730 new jobs over the period, 6.3% of all new jobs created in the Region. 	<ul style="list-style-type: none"> Creating 2,530 new jobs over the period, this sector is by far the largest creator of new jobs in the Region. This sector created 22% of all new jobs in the Region.
	<ul style="list-style-type: none"> The average annual growth rate of this sector was 5.7%, slightly higher than overall Regional growth for the same period. 	<ul style="list-style-type: none"> The average annual growth rate of this sector was 6.3%, slightly higher than the overall Regional growth rate.
	<ul style="list-style-type: none"> This sector witnessed the establishment of 42 new businesses over the period 2001-2005. 	<ul style="list-style-type: none"> This is also the largest single sector in the Region, accounting for almost 20% of all jobs.
	<ul style="list-style-type: none"> The region supports one business with over 200 employees in this sector. 	<ul style="list-style-type: none"> Both sub-sectors, Accommodation & Food Services and Amusement & Recreation Services, have strong location quotients of 2.14 and 1.48 respectively. This is not surprising though as the Tourism experience is often exported outside of the region. The concentration of employment does indicate that the Tourism product in the region is very much in demand.
	<ul style="list-style-type: none"> The Transportation, Warehousing and Logistics sector is a priority industry for Calgary. 	<ul style="list-style-type: none"> The region supports 6 business establishments with more than 200 employees in this sector.
		<ul style="list-style-type: none"> Finally, Tourism is a very significant priority for both Calgary and Alberta.

Source: Calgary Regional Partnership Sustainable Investment Attraction Strategy(August 2007): EcDev SOLUTIONS LTD. In collaboration with: JWP STRATEGY INTERNATIONAL LTD. EDP CONSULTING

Based on the preceding work the following three sectors were identified as having sufficient strength in the Calgary Region to grow and “attract”¹⁹ as a leading industry, they included:

- Professional & Technical Services
 - Engineering firms
 - One-Two Person Consulting, Design and Computer Systems firms
- Warehousing, Distribution & Logistics
 - Consumer products operations
- Tourism Investment
 - In-depth review and assessment of the tourism potential and opportunities in the Region - i.e. Sustainable Tourism Product and Infrastructure Development Study

At that time, EcDev Solutions identified that the remaining sectors under review (i.e. Food Processing, Wood Products Manufacturing, and Non-Wood Building Products Manufacturing) as not having sufficient strength in the Region to justify undertaking a business case for investment attraction.

2.3.1.1 Industry Location Quotients

In order to determine the level and degree of business and industrial specialization and, thus the economic diversity that may be developing in the Calgary Region, current location quotients (“LQ’s”) have been calculated to identify and measure the concentration of industry/business activity by major sector and sub-sector. The purpose of undertaking this analysis is two-fold.

- The 2007 Sustainable Investment Attraction Strategy utilized 2001 Census Data. Since then 2006 Population Census industry data has been released enabling a more relevant analysis of recent labour force and industry trends.
- The location quotients that were presented in the original strategy used Canada as a baseline to demonstrate the ratio of sector employment as a percentage of total regional employment in the Calgary Region. In order to closely tie the performance of Calgary Region to a more regional or overarching economy, the province of Alberta has been used.

Location Quotients are a commonly used tool in local/regional economic analysis.²⁰ They assess the concentration of economic activities within a smaller area relative to the overarching region in which it resides. A location quotient greater than 1.0 for a given sector indicates a local concentration of economic activity as compared to the overarching region, in this analysis the Province of Alberta, which may equate to a competitive advantage. Location Quotients equal to 1.0 for a given sector suggest that the Calgary Region has the same concentration of economic activity as the overarching region. Finally, a location quotient of less than 1.0 indicates a concentration of economic activity that is less than the overarching region and may point to a gap or disadvantage in attracting this form of business or industry.

In theory, industrial or business concentration that is greater than the overarching region average may represent the export base of the participating municipalities. Businesses that make up this export base may have chosen to locate in the area due to certain regional competitive advantages. These competitive

¹⁹ ATTRACT – High Growth / Low-Medium Presence: These industries present opportunities for new employment and investment from outside the region, but further analysis is required to determine how well the area can attract/support them.

²⁰ LQs are calculated by dividing the percentage of total number of local businesses represented by a sector, with the percentage of total provincial businesses in the sector. In theory, industrial or business concentration that is greater than the overarching region average may represent the export base of the participating municipalities.

advantages can be used to attract further investment in the future, in the same or complimentary industries.

Based on the 2006 data the location quotient analysis (figure 12) for the Calgary Region²¹ indicates a high concentration of regional labour force in the following sectors:

- Arts, Entertainment and Recreation (LQ 1.53)
- Agriculture, Forestry, Fishing and Hunting (LQ 1.39)
- Construction (LQ 1.19)
- Real Estate and Rental and Leasing (LQ 1.17)
- Accommodation & Food Services (1.17)
- Professional, Scientific and Technical Services (1.11)
- Management of Companies and Enterprises (LQ 1.10)
- Transportation & Warehousing (LQ 1.08)

Figure 12 demonstrates the LQ performance of sectors of the Calgary Region economy over the period from 2001 – 2006.

While the strong performance of the professional, scientific and technical services and transportation & warehousing sectors coincide with the recommendations by EcDev Solutions (2007), the performance of the manufacturing industry has dropped since 2001. However, it should be noted that the total number of people employed in the Region's manufacturing sector has increased over the same period and still comprises 6.51% of the local labour force. This fact suggests the opportunity to further develop Calgary Region's manufacturing base, especially since the drop in the Region's LQ indicates that there has been greater growth in this sector elsewhere in the province, suggesting a continued demand for manufacturing in the province.

The high performance associated with both arts, entertainment and recreation and accommodation and food services would also suggest that tourism plays a strong role in the regional economy.

Most notably is the performance associated with the agriculture, forestry and hunting sector which has also seen increases in employment and overall performance in the last 5 years.

While the identification and confirmation of target sectors is accomplished using this approach, this analysis and the work previously undertaken by EcDev Solutions to identify investment attraction opportunities does not provide sufficient understanding of emerging industry, consumer or global trends that may impact or shape the direction of these industry sectors. To effectively develop a target industry strategy (whether by business retention and expansion or investment attraction efforts) and establish key priorities within the sectors/sub-sectors a more effective industry analysis is required.

Based on the preceding results, there is a strong argument for the CRP to consider developing target sector strategies for the development and expansion of the following sectors/subsectors:

- Tourism
- Agriculture/Agribusiness, including food industries
- Transportation and Logistics
- Building Products

²¹ Location Quotient figures exclude the City of Calgary

Figure 12 – Location Quotients for 2-Digit NAICS Industries, Calgary Region (2001 – 2006)

Industry (NAICS)	2006	Classification	2001	Classification
71 - Arts, Entertainment and Recreation	1.53	High	1.49	High
11 - Agriculture, Forestry, Fishing and Hunting	1.39	High	1.33	High
23 - Construction	1.19	High	1.16	High
53 - Real Estate and Rental and Leasing	1.17	High	1.02	Medium
72 - Accommodation and Food Services	1.17	High	1.34	High
54 - Professional, Scientific and Technical Services	1.11	High	1.11	High
55 - Management of Companies and Enterprises	1.10	Medium	1.98	High
48-49 - Transportation and Warehousing	1.08	Medium	1.10	Medium
56 - Administrative and Support, Waste Management and Remediation Services	1.00	Medium	0.98	Medium
81 - Other Services (except Public Administration)	1.00	Medium	0.90	Medium
22 - Utilities	0.99	Medium	0.98	Medium
52 - Finance and Insurance	0.96	Medium	0.86	Medium
41 - Wholesale Trade	0.94	Medium	0.95	Medium
51 - Information and Cultural Industries	0.93	Medium	0.97	Medium
31-33 - Manufacturing	0.91	Medium	0.96	Medium
61 - Educational Services	0.90	Medium	0.83	Medium
44-45 - Retail Trade	0.88	Medium	0.93	Medium
21 - Mining and Oil and Gas Extraction	0.85	Medium	0.84	Medium
91 - Public Administration	0.80	Medium	0.71	Low
62 - Health Care and Social Assistance	0.80	Medium	0.77	Medium

Source: Statistics Canada 2001 and 2006

2.3.2 Labour Force by Occupation

Perhaps a more telling approach to understanding the potential associated with the Calgary Region economy is its labour force occupational data. Figure 13 provides a profile of the concentration of the labour force by occupation for the Calgary Region for 2001 and 2006. Areas of high labour force concentration in the Calgary Region in 2006 include:

- Sales and service occupations (22.2%)
- Business, finance and administration occupations (17.4%)
- Trades, transport and equipment operators and related occupations (16.8%)
- Management Occupations (13.2%)

Figure 13 – Labour Force by Occupation, Calgary Region (2001 & 2006)

	2006		2001		Overall Percentage Change (2001 - 2006)
All occupations, labour force 15 years and over by occupation	108,860	100.0%	86,855	100.0%	25.3%
Management occupations	14,390	13.2%	12,690	14.6%	13.4%
Business, finance and administration occupations	18,995	17.4%	14,215	16.4%	33.6%
Natural and applied sciences and related occupations	8,050	7.4%	5,490	6.3%	46.6%
Health occupations	5,120	4.7%	3,650	4.2%	40.3%
Occupations in social science	6,605	6.1%	4,585	5.3%	44.1%
Occupations in art, culture, recreation and sport	2,685	2.5%	2,135	2.5%	25.8%
Sales and service occupations	24,130	22.2%	20,335	23.4%	18.7%
Trades, transport and equipment operators and related occupations	18,310	16.8%	13,860	16.0%	32.1%
Occupations unique to primary industry	7,595	7.0%	7,085	8.2%	7.2%
Occupations unique to processing, manufacturing and utilities	2,915	2.7%	2,820	3.2%	3.4%

Source: Statistics Canada 2001 & 2006 Census

In addition, the occupations that have seen the largest increase in the number of workers in the Calgary Region are:

- Natural and Applied Sciences and related occupations (46.6%)
- Social science, education, government service and religion (44.1%)
- Health occupations (40.3%)
- Business, finance and administration occupations (33.6%)
- Trades, transport and equipment operators and related occupations (32.1%)

While these increases can be attributed in part to the strong performance of the oil and gas sector, the rate of increase in these occupations is also seen as contributing to the diversification of the Calgary Region economy. It should be pointed out though, that while the Region's resident labour force is employed in these types of occupation they may not work in the Region itself. This is discussed further in the next section

2.3.3 Commuting Patterns

Despite the strong performance of the Calgary Region as it relates to the occupational data, it must be seen in the context of commuting patterns in the Region. Based on the results of the place of work data provided by Statistics Canada (figure 14), only 32.9% of Calgary Region's resident workforce actually works in their residing community. Most significantly, 53.6% of the Calgary Region's population commute on a daily basis to the city of Calgary for employment.

This is not an uncommon trend given the proximity of the city to many communities in the Calgary Region and similar findings are also evident in other metropolitan areas of the country.

Figure 14 – Commuter Flow Patterns: Employed Labour Force 15 Years and Over Having a Usual Place of Work (2006)

Commuter Flows	
Place of Residence/Place of Work	Percentage
Total Calgary Region Population/ Calgary	53.6%
Total Calgary Region Population/Commute within Same Community	32.9%
Total Calgary Region Population/Commute within the Region	11.8%
Total Calgary Region Population/Commute outside of the Region	1.8%

Source: Statistics Canada, 2006: Commuter Flow Census Subdivision

However, the commuting patterns of Calgary Region residents demonstrate the increasing interdependence of the broader regional economy as it relates to economic growth, as well as employment and investment opportunities. This supports the need to develop a more regional approach to the physical growth of the region and its underlying infrastructure and servicing needs, as well as the advancement of economic development and investment attraction efforts.

2.3.4 Growth in Business Establishments

Notwithstanding the demonstrated need for a regional approach to the development and sustainability of the region, the Calgary Region as defined earlier has demonstrated a strong pattern of growth in small business formation over the 2003-2008 period. Using Statistics Canada's Canadian Business Pattern Data²², which provides a record of the total number of local business establishments by industry and size, figure 15 illustrates the pattern of business growth for the Calgary Region based on the number of employees.

Figure 15 – Business Formation, by size of employment, Calgary Region (2003 – 2008)

Employment Range	2003 (Counts)	2008 (Counts)	Net Change (2003-2008)	Percentage Change (2003 - 2008)
Total	7,381	8,941	1,560	21.1%
1-4 employees	4,595	5,791	1,196	26.0%
5-9 employees	1,223	1,535	312	25.5%
10-19 employees	793	871	78	9.8%
20-49 employees	504	502	-2	-0.4%
50-99 employees	165	137	-28	-17.0%
100-199 employees	72	66	-6	-8.3%
200-499 employees	16	26	10	62.5%
500+ employees	13	13	0	0.0%

Source: Statistics Canada: Canadian Business Patterns Data: June 2008

From 2003 to 2008, the growth in the number of business establishments for all sizes of businesses in the Calgary Region was 21.1% (1,560 establishments).²³ During this same period, the percentage increase in establishments with 1-4 employees for all industries in the Calgary Region was 26.0% (1,196 establishments). The large number of firms with less than 5 employees is suggestive of a high level of entrepreneurship in the Calgary Region and has implications for local economic development efforts and the outcomes of the regional economic strategy. Specifically the Region may be concerned with

²² Sources of information are updates from the Statistics Canada survey program and the Business Number registration source collected from the Canada Revenue Agency (CRA).

²³ While this is a net number, we can calculate the total number of businesses in 2008 by subtracting the total number of businesses in 2003.

supporting small business in the areas of access to capital, attracting and retaining employees, and providing competitive business costs to help them grow.

Based on Canadian Business Pattern data (figure 16), the following sectors comprise the largest proportion of businesses in the Calgary Region (excluding the self employed).

- Construction (17.1% of businesses)
- Professional, Scientific and Technical Services (16.3% of businesses)
- Other Services²⁴ (10.1% of businesses)
- Retail Trade (9.6% of businesses)
- Administrative and Support, Waste Management and Remediation Services (5.5% of businesses)
- Health Care and Social Assistance (5.4% of businesses)

Figure 16 – Business Formation Summary, Calgary Region – 2 Digit NAICs (2008)

	Total	Indeterminate	Subtotal	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500+
	23,201	14,260	8,941	5,791	1,535	871	502	137	66	26	13
11 - Agriculture, Forestry, Fishing and Hunting	2,475	2,021	454	356	57	20	16	4	1	0	0
21 - Mining and Oil and Gas Extraction	706	423	283	210	21	26	17	6	1	2	0
22 - Utilities	36	18	18	6	4	8	0	0	0	0	0
23 - Construction	3,759	2,230	1,529	1,011	317	133	56	8	4	0	0
31-33 - Manufacturing	563	283	280	139	55	27	26	17	11	3	2
41 - Wholesale Trade	723	416	307	189	61	38	16	1	1	1	0
44-45 - Retail Trade	1,469	607	862	331	263	153	74	21	16	4	0
48-49 - Transportation and Warehousing	1,104	687	417	302	60	25	20	7	3	0	0
51 - Information and Cultural Industries	186	108	78	48	9	15	4	1	0	0	1
52 - Finance and Insurance	889	710	179	118	30	19	11	0	0	1	0
53 - Real Estate and Rental and Leasing	1,690	1,372	318	242	35	30	8	3	0	0	0
54 - Professional, Scientific and Technical Services	4,185	2,729	1,456	1,250	119	57	27	2	0	1	0
55 - Management of Companies and Enterprises	663	559	104	77	11	6	7	2	0	0	1
56 - Administrative and Support, Waste Management and Remediation Services	1,118	628	490	299	100	54	31	3	3	0	0
61 - Educational Services	218	123	95	50	20	9	7	2	1	0	6
62 - Health Care and Social Assistance	675	194	481	297	101	51	21	4	4	3	0
71 - Arts, Entertainment and Recreation	387	210	177	76	35	19	23	12	9	3	0
72 - Accommodation and Food Services	706	221	485	116	89	120	113	36	7	2	2
81 - Other Services (except Public Administration)	1,625	719	906	670	146	61	21	6	0	1	1
91 - Public Administration	24	2	22	4	2	-	4	2	5	5	0

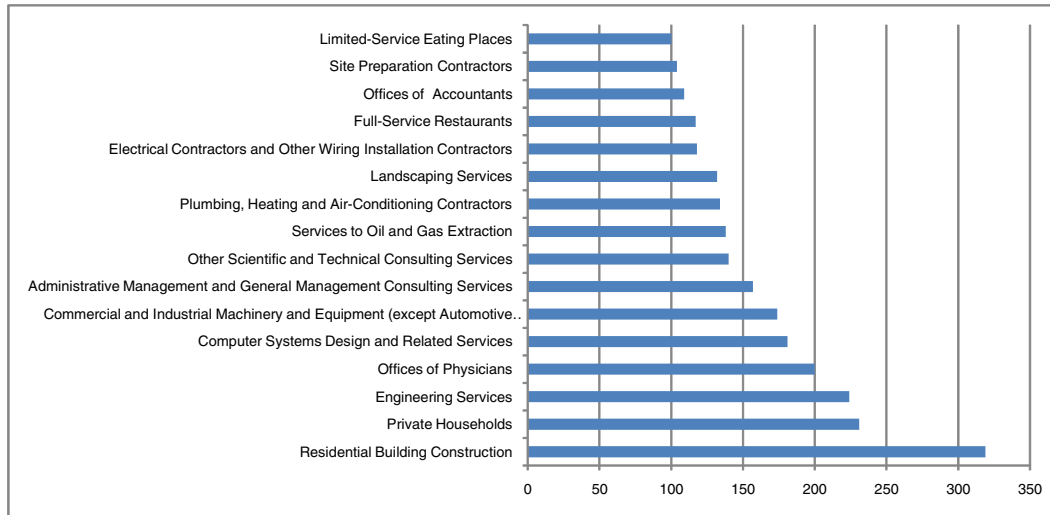
Source: Statistics Canada: Canadian Business Patterns Data: June 2008

Taking into consideration those businesses that are home-based or cottage industries, the Professional, Scientific and Technical Services sector comprise the largest proportion of business establishments in the Region followed by Construction and Agriculture.

Given the predominance of small business in the Calgary Region, figure 17 provides a detailed understanding of the concentration of businesses (>100 firms) with an employee size of less than 20. While many of these operations are service businesses that arise as a result of the growth in population, there are a significant number of businesses that may have located in the Region because of the business cost environment, quality of life experience, cost of living as well as the access to the city of Calgary that the surrounding municipalities provide.

²⁴ Other Services: This sector comprises establishments, not classified to any other sector, primarily engaged in repairing, or performing general or routine maintenance, on motor vehicles, machinery, equipment and other products to ensure that they work efficiently; providing personal care services, funeral services, laundry services and other services to individuals, such as pet care services and photo finishing services etc...

Figure 17 – Firms with an employee size of < 20 employees, by NAICs subsector (6 digit), Calgary Region (2008)



Source: Statistics Canada: Canadian Business Patterns Data: 2003 & 2008

2.4 Calgary Region's Creative Economy

2.4.1 The Creative Economy Defined

An essential component to understanding the level of innovation, or creativity a community or region possesses is to understand the nature of that region's workforce including the degree to which the workforce is specialized or skilled.

In order to ensure its future economic prosperity, the Calgary Region, not unlike other communities and regions across the country must be able to showcase a workforce that has the characteristics of today's knowledge economy. This places a greater emphasis on the role of attracting and retaining talent with a knowledge intensive skill set. Drawing on the recently completed report by Roger Martin, Dean of the Rotman School of Management at the University of Toronto and Richard Florida, Director of the Martin Prosperity Institute at the Rotman School entitled *Ontario in the Creative Age: Toward a New Economic Blueprint*, an understanding that the changes that Ontario, and by extension the rest of the country, is experiencing is even more significant than a deep and serious recession but the rise of a new economic system - the creative economy, becomes evident.

While a major focus of the provincial report was on larger urban areas, it also draws attention to opportunities associated with smaller towns and rural areas, driven by a growing number of small and medium-sized creative businesses responding to new consumer demands for original and local place-based products and services in the fields of food, wine, information technology, graphic design, and hospitality - to name a few.

A further point related to the creative economy is the growing significance of *quality of place* as a major economic driver. Originally, Richard Florida identified the 'Three-T's' to describe the conditions for success in the creative economy; Technology, Talent and Tolerance. Recently he added a fourth T - Territory to reflect the importance of quality of place. A major factor driving creative economies in smaller urban centres and rural areas are the life choices being made by people wishing to make a change and who are drawn to the quality of life offered in these areas, while still benefitting from the proximity to larger

urban centres. The growth in small business establishments that provide business, technical and scientific services in many small and rural towns is testament to the appeal that these communities offer.

Martin & Florida suggest that local economies are comprised of four classes of workers, defined by the type of work people engage in. These classes include:

- 1) Creative Class - A growing group of workers who utilise brain power to complete tasks at work. (i.e. scientists and technologists, artists and entertainers and managers and analysts)
- 2) Service Class – Work involves occupations with little autonomy and is focused on the delivery of services (i.e. retailing, food-service workers, janitors and clerks)
- 3) Working Class – Consists of people that use physical skills and engage in repetitive tasks (i.e. tradespersons, mechanics, crane operators and assembly line workers)
- 4) Agricultural Class – Those occupations involved in farming, forestry and fishing

Defining the economy by the work people do is different than the conventional way of defining it by the industry they work in. For example, somebody may be working in a traditional industry - such as automotive manufacturing – but engaged in engineering or research rather than the assembly line and so would be considered part of the creative economy.

2.4.2 Statistical Definition

In his highly acclaimed book *The Rise of the Creative Class* (2004)²⁵, Florida demonstrates this breakthrough idea, in which an alternative view is suggested to explain the forces that redefine economies, companies and communities during both an upswing and downturn in an economy. Florida's theory is a detailed account of both the societal and economic impact that the emergence of the creative class worker has had on both the local and international economies. Broadly speaking, the creative class constitutes people who deal in ideas – in the arts, design, new businesses, new social concepts, etc. A key characteristic of this creative class is that it is mobile – and thus communities that can attract or retain them through the quality of life and quality of place factors; are more likely to benefit from the new ideas and new investment potential that they bring with them. The following is a list of classifications of this 'creative class' as defined by Florida:

- Science and engineering;
- Architecture and design;
- Education; and
- Arts, music and entertainment.

On a broader level, he has also included the following creative professionals:

- Business and finance;
- Law; and
- Health care and related fields.

While this concept was originally used to describe the activity of the creative class in large urban areas, this theory can also be applied to smaller economies including those in the Calgary Region economy. In

²⁵ And continued in his more recent works, *The Flight of the Creative Class* (2005) and *Who's Your City* (2008)

assessing and analyzing the impact of the creative economy in the Region, there are four important attributes that would typically form the framework:

- Calculations based on the number of businesses rather than the labour force, to shed light on the dynamics of local enterprises;
- An examination of both cultural and innovation centered enterprises, which comprise a mix of arts and culture to engineering businesses;
- Enterprises directly involved in the creative activities; and
- A focus on the type of work that is being completed by an employee rather than a review of the industry in which they work in.

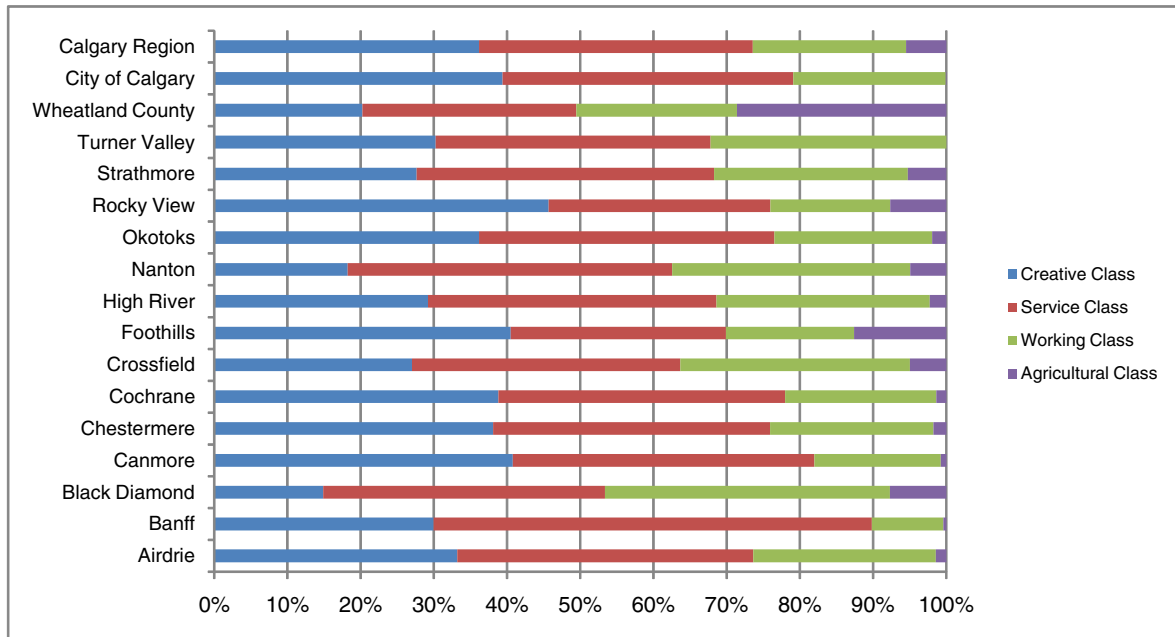
It is important to note the above mentioned approach differs from the traditional method of assessing the impact of the local economy, in that it does not exclusively give consideration to labour force activity or concentration by industry sector or subsector. Instead, in order to effectively assess the scale of the creative economy in the Calgary Region consideration will be given to both business establishment and occupation data. Detailed industry categories (as defined by the North American Industrial Classification System) have been developed that identify the range of business and industries included in the creative economy (Appendix II).

Based on this approach, a comprehensive listing of creative enterprises using Statistics Canada's Canadian Business Patterns data has been compiled for the Calgary Region. Similar to the analysis provided in Section 2.3.4, this information provides a record of the total number of local business establishments by industry and size.

2.4.3 The Creative Economy Revealed

Based on the definition provided earlier, creative class occupations account for 36.2% of all occupations in the Calgary Region with the municipalities of Rocky View, Canmore and Foothills comprising the largest proportion of creative professionals in the Region. Within each of these communities, the creative class comprises 45.6%, 40.8% and 40.5% of all occupations, respectively (figure 18). The figure below also demonstrates the magnitude of the City of Calgary's creative class with a significant number of residents (40.4%) working in Richard Florida's define creative economy occupations such as business and finance (20.3%) and to a lesser extent professional occupations in natural and applied sciences (7.1%).

Figure 18 – Martin & Florida’s Labour Force by Occupational Class, Calgary Region & City of Calgary (2006)



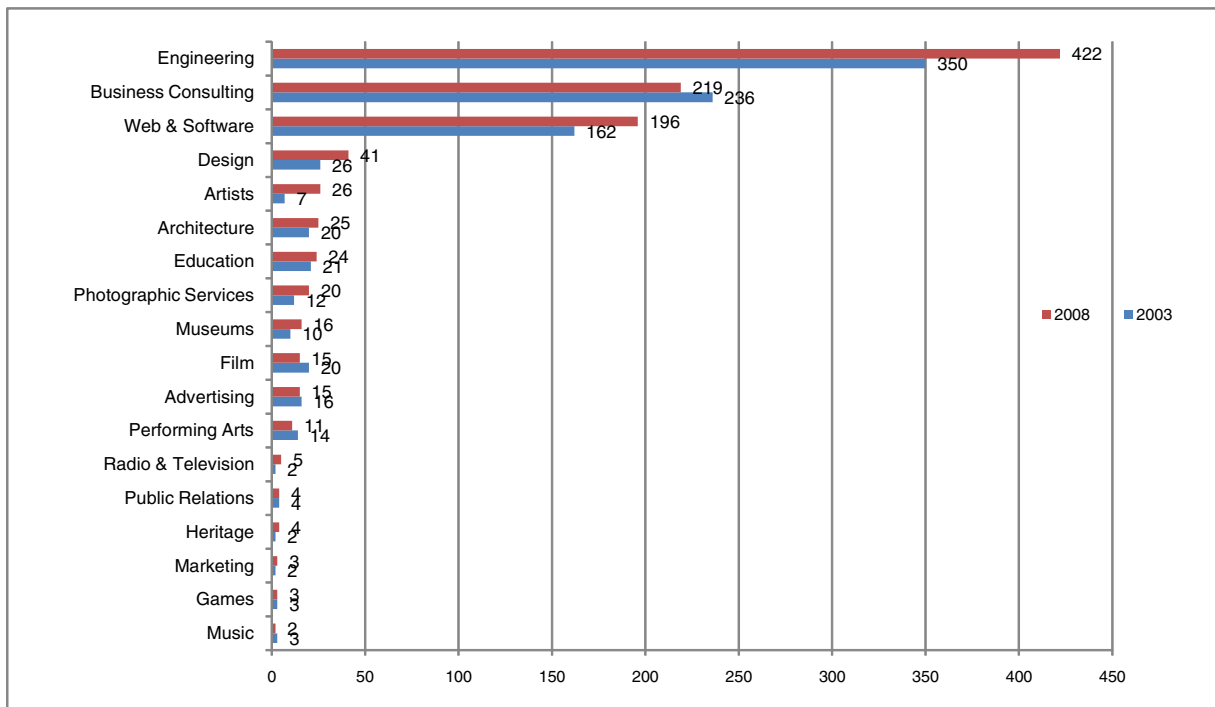
Source: Statistics Canada, 2006

Figure 19 provides an understanding of the growth that is occurring in the Region’s creative economy. While Engineering, Business Consulting and Web and Software firms dominate, the results suggest that there has been a 15.5% increase in the number of creative businesses operating in Calgary Region from 2003 to 2008. Engineering, Web & Software and Artists operations have seen the most significant growth 72, 34 and 19 businesses respectively, while Business Consulting, Film and Performing Arts sectors have recorded a decline in the number of businesses, of -17, -5 and -3 businesses respectively.

On a more detailed level, the following businesses have experienced a remarkable percentage increase in the number of creative businesses in Calgary Region.

- Software Publishers (400.0% or an increase of 4 companies)
- Environmental Consulting Services (86.4% or an increase of 19 companies)
- Art Dealers (71.4% or an increase of 5 companies)

Figure 19 – Creative Economy Establishments Growth by Number of Businesses, Calgary Region (2003 & 2008)



Source: Statistics Canada, Canadian Business Patterns Data: June 2003, 2008

An increase in the number of creative economy businesses (15.5% increase over 5 years) supports the idea of a growing creative economy in the Calgary Region. While less than the rate of growth attributed to economy overall, this presents an opportunity for the CRP to better engage and support this aspect of its economy and look beyond the traditional efforts of investment attraction, in its efforts to promote and market the region in the future.

While the rate of growth by type of establishments is an important consideration, the range and variety of creative class establishments is of greater importance, particularly in light of the increase across almost every category. These findings make for a compelling argument as to the type of investment attraction efforts (both marketing and messaging) that the CRP and its member municipalities should engage in and provide greater opportunity for diversification within both the local and regional economy.

2.5 Summary of Findings

The Calgary Region has experienced tremendous population growth in recent years which has translated into strong employment growth across a broad range of industry sectors and a significant rise in the number of small business start-ups. While the regional and local economies remain fairly dependent on the success and expansion of the province's energy sector, other opportunities for diversification and business investment have emerged.

Based on the foregoing high level review of the Calgary Region economy including its recent labour force performance, the following findings are considered relevant to the development of a Calgary Regional Partnership's Regional Economic Development Strategy.

- The current population of the Calgary Region has increased 23.6% since 2001 with the highest rate of growth occurring in the communities of Airdrie, Chestermere and Okotoks which are in close proximity to the city of Calgary.
- The rate of growth in the Region is expected to continue with the population of the Calgary Economic Region reaching 1.395 million by 2013, according to the city of Calgary's Corporate Economics section.
- The strong rate of growth relative to the city of Calgary and the Province as a whole can be attributed to a variety of factors – the availability and cost of housing, perceived quality of life indicators, and employment considerations.
- The commuting patterns of Calgary Region residents demonstrate the increasing interdependence of the broader regional economy as it relates to economic growth as well as employment and investment opportunities
- This unprecedented level of population growth in the city and the CER however, has heightened demand for municipal services in the form of demand for housing, schools, social services as well as improvements to infrastructure and transportation.
- The Calgary Region has a high percentage of its population concentrated in the 25 - 44 years of age cohort (28.3%) and the 45 – 64 years (28.0%) age cohort. The concentration of population in the 45-64 year age group coupled with the high percentage of population that is under 15 years of age suggests the popularity of the region for families.
- While the Calgary Region has a significant number of high income earners relative to both the city and the Province, the city and by extension the Calgary Region has one of the highest cost of living rates in the country which has impacted the competitive positioning of the Region and contributed to labour force retention issues.
- Much of the Region's recent employment growth has been fuelled by the growth in demand for services attributed to the substantial increases in population both in the Calgary Region and the city of Calgary e.g. construction, health care, real estate services, and education. However, growth in the province's energy sector has contributed to a high proportion of employment in the professional services and finance and insurance sectors while the province's strong economic performance and location relative to both the U.S. border and the Asia-Pacific Gateway has fuelled a well developed and integrated transportation and logistics sector.
- Work undertaken by EcDev Solutions suggests that there is business investment opportunity associated with 6 key sectors. These include:
 - Agri-Food and Food Processing;
 - Advanced Wood Products Manufacturing
 - Building Products Manufacturing;
 - Professional & Technical Services;
 - Warehousing, Distribution & Logistics; and
 - Tourism

Based on the current performance of the Calgary Region together with the priorities set by both the city of Calgary (CED) and the Province of Alberta, these sectors/subsectors should form the basis for its business investment attraction and expansion efforts in the future. In order to

effectively move forward on the promotion and attraction of related business investment, the CRP must develop a more thorough understanding of the regional, provincial and global trends that are affecting or driving business investment in these sectors.

- Business growth is also a strong indicator of economic potential within a local or provincial economy. In the case of Calgary Region, there was a 17.4% increase in the number of businesses in the Region with the majority of these having less than 5 employees. While this suggests a high level of entrepreneurship in the Calgary Region it has implications for local and regional economic development efforts with regards to support for small business to help them grow into 10 and 25 employee companies. Support may include access to capital, attracting and retaining employees and maintaining competitive business costs among others.
- Taking into consideration those businesses with a regular payroll and those that are self employed, the greatest proportion of businesses are concentrated in Professional, Scientific and Technical services, followed by Construction and Agriculture.
- A further consideration to understanding the Calgary Region economy is the extent to which creative class occupations are represented. Currently, creative class occupations, as defined by Dr. Richard Florida account for 36.2% of all occupations in the Calgary Region with the municipalities of Rocky View, Canmore and Foothills comprising the largest proportion of creative professionals in the Region at 45.6%, 40.8% and 40.5% of all occupations, respectively.

Given the heightened importance of these types of occupations (and they affect all industry sectors) these findings make for a compelling argument as to the type of investment attraction efforts (both marketing and messaging) that should engage both the CRP and its member municipalities and provides greater opportunity for diversification with both the local and regional economy.

3 Calgary Region SWOT Assessment

It is important to consider as a vital component of an economic development strategy the opinions and thoughts of those business and community leaders that are present in a jurisdiction. These individuals can provide an excellent source of up-to-date information or perceptions, as it relates to an area's strengths and weaknesses as well as the opportunities and threats that may be confronting industry groups or a region as a whole in its efforts to attract and retain business investment.

A SWOT assessment is a simple strategic planning tool used to evaluate the strengths, weaknesses, opportunities, and threats which identifies the internal and external factors which will help and hinder achieving the Region's economic development goals. The four component elements are:

- Strengths – it is essential that an economic development strategy builds and capitalizes on the unique elements and strengths of a local community in a way that will lead to economic growth and critical mass of business and investment activity in the future.
- Weaknesses – understanding the strengths on which to base economic growth is important, but it does not necessarily ensure that a community is ready or able to capitalise on them. Weaknesses are those attributes which will keep the community from taking advantage of its strengths and achieving its economic development goals.
- Opportunities – often external factors can play a significant role in determining the possibilities for an economic development strategy. This can include for example, structural changes in the broader economy, shifts in demographics or technological changes.
- Threats – capitalizing on opportunities can drive economic prosperity, but equally important, is how a community addresses or manages the external threats that may keep it from achieving their vision of a vibrant and healthy community.



In this context, an assessment of the Calgary Region's Strengths, Weaknesses, Opportunities and Threats, was undertaken to understand the Region's capacity to drive growth and investment to the area and deliver on economic development activities and programming that would contribute to the economic sustainability of the Region over the longer term.

The assessment was accomplished based on an extensive review of available background reports and studies provided by the CRP and its member municipalities and interviews with 40 business and community stakeholders from across the Region.

In addition, 3 focus groups were held in the communities of Cochrane, Okotoks and Airdrie with a further 47 individuals. A focus group was also conducted with the 12 representatives of the CRP's Economic Development Forum, as well as the CRP's Executive Committee. The focus groups were designed to elicit a broad range of input on the challenges and opportunities facing the Calgary Region and its member municipalities as they advance their economic development interests and discern the range of opportunities and strategies that could comprise the CRP's Economic Development Strategy. The Economic Development Forum and the Executive Committee were also asked for their input on the role of the CRP in the delivery of economic development programming.

3.1 SWOT Results

The discussion that follows summarizes those issues which are considered critical to the delivery of economic development across the whole of the region and the development of this economic development strategy.

3.1.1 Strengths

Availability and Affordability of Industrial Land – The availability and affordability of prime commercial and industrial land in many communities across the Region is seen as a strong competitive advantage to the attraction and retention of business to the Region. This is particularly important as it relates to lands in proximity to major highways, the international airport, Springbank Airport and the city of Calgary.

Engaged Communities – Residents and business owners in the Calgary Region are actively engaged in the success and sustainability of their communities. This is demonstrated in the success of the local Chambers of Commerce, the high level of volunteerism across the Region and the level of collaboration and support that has emerged to tackle regional issues impacting the Region's growth and development.

Entrepreneurial Attitude – The Region's reputation as a 'can do' place for business has resulted in a strong rate of entrepreneurial and employment growth across the region and a significant rise in the number of small businesses across the Region. This has contributed to a broadening of the regional economy and a growing number of competitive business and industry sectors.

Growing Regional Market Capacity – The substantial rate of population and employment growth in the Calgary Region has contributed to the diversification of local economies across the region. This in turn has enabled the attraction of a greater range of business and consumer opportunities.

Major Transportation Node – The city of Calgary and the Calgary Region share in the benefit of a well developed regional transportation network and logistics infrastructure attributed in part to its geographic location in Western Canada. This includes an expanding international air cargo and passenger hub operation at Calgary International Airport, rail and intermodal auto and trainload facilities from both Canadian Pacific Railway and Canadian National that link the Region to Canada's Western Seaboard as

well as major cities across Canada and the U.S., access to both the TransCanada Highway and the Canamex “smart corridor”, as well as proximity to the Coutts/Sweetgrass international border crossing.

Quality of Life – The Region has great natural beauty and offers a wide range of passive and active recreational pursuits that offer year round entertainment to area residents. This combined with a ‘small town’ feel in many of the communities across the Region, the ability of residents to engage with their community and know their neighbours, and ready access to the arts and cultural attributes offered by the city of Calgary contributes to a high standard of living for area residents.

Proximity to the city of Calgary – The Calgary economy is a strong economic driver for the Province and provides the Calgary Region with opportunities to grow and diversify the local economies; it also acts as a magnet for new businesses, residents and workers to the region. Calgary’s proximity to many of the communities in the Calgary Region, also enables people to live in these communities while travelling the short distance to Calgary for employment, entertainment and shopping.

Strength of Energy Sector - The growth of the province’s energy sector has positioned the city of Calgary as one of the fastest growing metropolitan economies in Canada and resulted in a significant concentration of professional and technical service providers to the oil and gas sector. With its emergence as a global energy centre, the city and by extension the Region has an opportunity to become a world leader in all things related to the energy sector.

Broad Range of Tourism Experiences – With its location as the gateway to the Rockies and its proximity to world class natural areas, the Calgary Region and the city of Calgary are strong drawing cards for visitors and residents alike. The result is a diverse and growing tourism industry that includes recreation, heritage and convention activity.

3.1.2 Weaknesses

Lack of Intra-regional Transportation System – As the city of Calgary and the communities surrounding the city grow, the lack of an effective and efficient intra-regional public transportation system is seen as a limiting factor to the movement of commuters around the Region and may affect the long term attractiveness of the region for workers and the sustainability of the regional economy.

Inadequate Transportation Infrastructure: Calgary and Alberta’s transportation network are seen as inadequate and overly stressed given recent levels of growth and development. The condition of east/west transportation networks is impacting trucking and rail transportation and contributing to a growing inefficiency of the Region’s transportation network. The lack of a regional transportation plan and a sustained funding model for infrastructure improvements has exacerbated the problem.

Water Infrastructure – With the rapid growth of the city of Calgary and the surrounding Calgary Region, water supplies and supporting infrastructure are under strain. While consideration is being given to how best to improve or deal with future growth, the availability of future water supplies is seen as a significantly limiting factor to growth in the region requiring a rethink of the region’s approach to land development.

Tight Labour Market – Though the recent economic downturn has relieved this situation somewhat, many anticipate that the region will again experience a labour supply shortage, resulting in higher wages, and high turnover for companies across the region and challenges with respect to the recruiting of workers to the Region.

Lack of Post Secondary Educational Opportunities – While the region benefits from the presence of a number of high quality, world-class post secondary educational institutions they are all concentrated in the city of Calgary. The lack of post secondary educational and training opportunities in the Calgary Region is seen as limiting local efforts to diversify their economies and provide enhanced support to business and requires students and professionals to travel into Calgary for their education and training.

Affordable Housing – The economy of the Calgary Region has grown rapidly in recent years and though there has been a substantial increase in the housing stock, supply has not kept pace with demand. In particular there is a need for affordable housing options in most communities across the region, as well as alternatives to single family, low density housing.

3.1.3 Opportunities

Satellite Campuses – The lack of educational facilities outside of Calgary presents an opportunity to improve training and development through the creation of satellite campuses in one or more of the communities in the Calgary Region. This discussion should be pursued at both the college and university level and involve opportunities to have programming better reflect the needs of business and emerging industries.

Emergence of Alternative Energy Technology - Alberta is in the global crosshairs of the environmental movement to address greenhouse gases. In this context, Calgary energy companies are well positioned to focus on opportunities associated with greenhouse gas reduction strategies, technologies and innovations, and alternative energy and environmental technologies. This in turn provides further opportunities to develop and diversify both the local and regional economies. The CRP can play a leadership role in advancing the discussion on the feasibility of developing alternative forms of energy in the Calgary Region (e.g. wind, solar, and biodiesel).

Global Tourism Moving towards Niche Markets – Tourism is already a significant contributor to the regional economy and will continue to be so, there are however opportunities to diversify this sector into niche areas of tourism such as health and wellness (spas), eco-tourism, culinary tourism, agri-tourism, adventure outfitting etc. and in doing so, better equip the industry to respond to shifting demands of the global tourist.

Agriculture / Agribusiness – The expanding population in the Calgary Region represents an opportunity to develop the Region's agriculture base by developing additional local food options, value added niche food processing, greenhouses and agri-tourism as well as contributing to the Region's alternative energy opportunities.

The Creative Classes – The growth of Calgary as a centre for financial, technological and health professions has seen the increasing importance of the creative classes across the whole of the region, an aspect of the economy that will play an important part in the future economic success of the region.

Start-up businesses/incubation – Though the Region already has business support services, there is an opportunity to provide greater support to entrepreneurs and new businesses owners through the development of incubation facilities, mentoring programs, improved access to financing, and educational and training opportunities etc.

New Ways of Working – Increasingly companies are looking at ways of improving productivity and employee retention levels by implementing new ways of working, such as Teleworking or flexible working. The CRP in partnership with the City of Calgary has an opportunity to promote this approach as a way of

reducing congestion and the region's ecological footprint, while improving efficiencies for employers and quality of life for employees.

3.1.4 Threats

Risk of Becoming Bedroom Communities – The expansion of the city of Calgary's economy combined with the cost of housing in the city has contributed to an increase in residential development and subsequent growth of communities within easy commuting distance of Calgary. The high rate of commuting into the city suggests that without strategies to attract and retain business investment to employment and business areas in these communities, they risk becoming bedroom communities. This in turn contributes to the lack of sustainability of these communities over time.

Slowing Global, National and Provincial economy – The current global financial crisis and economic downturn will have a significant impact on Alberta's and Canada's economy. The OECD (Nov 2008) predicts that many of the OECD economies are on the verge of protracted recession of a magnitude not experienced since the early 1980s. The U.S. economy was expected to grow by only 1.4% in 2008 and to shrink by 0.9% in 2009, with a recovery in 2010. Similarly, the Canadian economy was expected to grow marginally in 2008 (0.5%) and further contract by 0.5% in 2009, recovering to grow by 2.1% in 2010.

Environmental Degradation and Damage: The rapid rate of growth in the Province has put considerable pressure on the region's water supply. Recent reports suggest that the water levels in the rivers of Alberta have declined 20 to 84 percent over the last 100 years and waterways in central and southern Alberta have seen the biggest decline. The declining river flows and growing water usage, especially as it relates to the processing of the vast oil sands, extensive irrigation, manufacturing and population growth is contributing to what some have called an unprecedented water crisis. The oil sands development has also contributed to an increased level of greenhouse gas emissions and reduced the overall air quality in the region.

Reliance on the Oil & Gas Industry – The dominance and reliance on the oil and gas sector industry has overshadowed the growth and development of other sectors by attracting the best labour through higher wages (which may also be suppressing innovation through entrepreneurs) and pushing other business costs higher.

3.1.5 Summary

While the Calgary Region is presented with a range of opportunities to drive economic growth, an overarching theme emerges from the SWOT assessment – the need to focus on the essential elements of a building and maintaining a sustainable region and economy. This includes fostering and maintaining the region's entrepreneurial business climate, targeting strategic growth opportunities and by enhancing the Region's quality of life through improved access to education and training and improvements to the region's transportation infrastructure.

4 Economic Development Capacity in the Calgary Region

A primary consideration in the development of an economic development strategy for the Calgary Regional Partnership is the effective and efficient implementation of that strategy. For this reason, the project team has undertaken a review of the current capacity for economic development services and programming across the broader region and the degree of alignment that may foster collaboration and coordination of regional economic development efforts in the future.

The results of this review will have a direct bearing on the required governance model and implementation planning that is required for a CRP economic development strategy. It should be noted that member municipalities have not been consulted directly on the proposed direction and implementation of an economic development strategy. Rather, we have relied on the information provided to us by the member municipalities, as well as a review of available on-line publications. To be effective going forward will require ongoing dialogue with the communities as to their strategic planning efforts and community based economic development activities.

Currently, there are a number of agencies and corporations actively involved in providing economic development support and programming across the broader Calgary Region. This ranges from the federally supported Community Futures Development Corporations, to the Calgary Regional Partnership itself, as well as a number of municipal economic development offices including Calgary Economic Development. As noted previously, each of these stakeholder groups is making important contributions to the economic development landscape in the region and will have a continuing role to play in the development and implementation of an economic development strategy for the Calgary Regional Partnership.

The following discussion summarises the current delivery model for economic development within the CRP as well as the economic capacity within each of the CRP member and stakeholder groups.

4.1 Calgary Regional Partnership

The Calgary Regional Partnership is a not for profit corporation consisting of the 18 member municipalities including one first nations community. The Partnership has a mission to work together to shape and champion a vision for the region that is based on four pillars: Enriched Communities, Prosperous Economy, Healthy Environment, and Sustainable Infrastructure. The Partnership has also adopted a universally accepted definition of sustainable development and endorsed the application of a “Triple Bottom Line” analysis in decision making based on social, environmental and economic impact.

The Partnership’s most recently produced 2006-07 Business Plan focused on seven strategic initiatives, specifically:

1. Regional Growth and Sustainability Framework – to guide the Region’s growth and protect, preserve and enhance the environment, economy and communities that make up the partnership.
2. Regional Water and Waste Water Servicing – to develop a cost effective regional water / wastewater servicing master plan for the region that addresses the economic, environmental and community enrichment goals of the Region.
3. Regional Economic Development – to establish sustained economic prosperity for the region whilst protecting the Region and its communities’ environment and quality of life.
4. Regional Geographic Information System – to develop and implement a governance model and business plan for a regional GIS program.
5. Organic Waste Reduction – Regional Composting – to develop a regional composting program that will significantly reduce organic products going into landfills.

6. Specialized Transportation – to develop and implement a sustainable demonstration project that helps fill gaps in the current mix of specialized transportation services and enhance the efforts of local providers of transport services to the aging and disabled.
7. Building Relationships and Communicating – to maintain the good relationships and shared goals of the various partners and members of the Partnership.

The Partnership has an annual operating budget of approximately \$2,450,186²⁶ comprised of funding received from Alberta Municipal Affairs, Alberta Economic Development, its member municipalities and project specific support such as Alberta Infrastructure and Transport's funding of the Regional water and waste water servicing program and Alberta Municipal Affairs funding of the Regional Geographic Information Systems project. Member contributions account for \$257,704 per year, with almost 75% of this coming from the City of Calgary. Expenditures within the organisation are spread across all of the priority areas. The two year budget (from 2004 to 2006) shows the majority of these funds have been spent on the Regional Sustainability Strategy, accounting for almost 50% of all expenditures. The current breakdown of municipal member contributions is illustrated in figure 20.

Figure 20

CRP Municipal Contributions (2007)

Municipality	2006 Population	2007 Contribution	Per Capita Contribution	% Total Contribution
Airdrie	27,069	\$ 10,828.00	\$ 0.40	4.2%
Banff	8,352	\$ 3,341.00	\$ 0.40	1.3%
Bighorn No. 8, MD of	1,298	\$ 519.00	\$ 0.40	0.2%
Black Diamond	1,866	\$ 746.00	\$ 0.40	0.3%
Calgary	956,078	\$ 191,216.00	\$ 0.20	74.2%
Canmore	11,442	\$ 4,577.00	\$ 0.40	1.8%
Chestermere	7,904	\$ 3,162.00	\$ 0.40	1.2%
Cochrane	12,688	\$ 5,075.00	\$ 0.40	2.0%
Crossfield	2,603	\$ 1,041.00	\$ 0.40	0.4%
Foothills No. 31, MD of	17,682	\$ 7,073.00	\$ 0.40	2.7%
High River	9,522	\$ 3,809.00	\$ 0.40	1.5%
Nanton	1,841	\$ 736.00	\$ 0.40	0.3%
Okotoks	11,664	\$ 4,666.00	\$ 0.40	1.8%
Redwood Meadows	1,150	\$ 500.00	\$ 0.43	0.2%
Rocky View No. 44, MD of	30,418	\$ 12,167.00	\$ 0.40	4.7%
Strathmore	9,653	\$ 3,861.00	\$ 0.40	1.5%
Tsuu T'ina Nation	1,292	\$ 517.00	\$ 0.40	0.2%
Turner Valley	1,786	\$ 714.00	\$ 0.40	0.3%
Wheatland County	7,889	\$ 3,156.00	\$ 0.40	1.2%
	1,122,197	\$ 257,704.00	\$ 0.23	

Source: CRP Economic Development Forum, Annual Operations Plan 2008-2009

The Partnership is governed through the Calgary Regional Partnership General Assembly, which is made up of 3 representatives from each of the member municipalities. The general assembly meets semi-

²⁶Based on 'receipts' from the 2006-2007 Business Plan, including membership fees.

annually and approves annual budgets and business plans for the partnership. The management of the Partnership is guided by the Calgary Regional Partnership's Executive Committee which meets monthly and guides the projects undertaken by the Partnership. Under the Executive Committee sit a number of operational committees and forums which coordinate and implement the approved business plans. One such forum is the Economic Development Forum.

4.1.1 Calgary Regional Partnership Economic Development

The Partnership pursues its economic development activities through the Economic Development Forum (EDF), which reports to the Executive Committee of the Partnership. The EDF is an ad hoc group of stakeholders, intended to support the members' municipal economic development and to realise the significant benefits associated with integrating local strategies within a regional context and by taking a more strategic and regional approach to the implementation of economic development programming. It is intended to provide an advantage over regions that have yet to pursue a collaborative or cooperative approach to economic development. Stakeholders include economic development professionals in the Region, not for profit organisations such as Community Futures, and various government officials with some form of economic development mandate. The EDF is currently chaired by Joann Churchill, Deputy Mayor of Cochrane and supported by two part time contractors. The department of Alberta Finance and Enterprise contribute core funding, guidance, and administrative support. Calgary Economic Development provides assistance and resources including complimentary space for the EDF's part time economic development project manager.

During the two year time period 2004-2006, economic development expenditures accounted for approximately 16% or \$311,997 of the CRP's total base line costs (excludes external project funding). Based on the current population of the Calgary Region, this represents a per capita expenditure of .86 cents. Accounting for the fact that many municipalities are also funding economic development departments, this still suggests that the CRP is under-resourcing its economic development efforts.

This becomes even more problematic given the considerable consensus that emerged from the stakeholder consultation that the role of CRP with respect to economic development programming and project based work should be focused on more effective marketing and communication efforts, target sector investment attraction and development initiatives, enhanced research and analysis as it relates to investment opportunities and best practices, and additional project support around key economic development priorities.

The EDF receives annual approval from the CRP Executive Committee for its work plan and budget. At year end, the EDF provides an annual report on the accomplishments of the group as outlined in the work plan. The Economic Development Forum's Annual Operational Plan 2008-2009 identified five key goals for the forthcoming year:

1. Employ a collaborative approach to regional economic development, emphasizing the benefits associated with integrating local strategies within a regional context.
2. Supporting business retention and expansion activities.
3. Develop a market targeted economic identity.
4. Provide a vehicle for local governments to partner with economic development stakeholders.
5. Provide a venue where best practice and economic development knowledge can be shared.

The forecast budget for economic development in 2008-2009 is \$293,000. The detailed breakdown of funding by activity is illustrated in figure 21. It is clear from this budget that the priority lies with business retention and expansion efforts.

Figure 21 – CRP Economic Development Budget 2008-2009

Initiatives	2008-2009			
	CRP Budget	AFE Budget	Other Budget	Total Budget
1. Business Retention & Expansion				
Investment Attraction - sector development	\$ 40,000		\$ 130,000	\$ 170,000
Labour Force Strategy	\$ 10,000	\$ 4,000		\$ 14,000
Business Visitation Program		\$ 5,500	\$ 5,500	\$ 11,000
Total Estimated Core 1	\$ 41,000	\$ 9,500	\$ 135,500	\$ 186,000
2. Marketing				\$ -
Marketing and Corporate Identity		\$ 7,500	\$ 7,500	\$ 15,000
Updates to CRP Website		\$ 5,000		\$ 5,000
Regional Movie Map	\$ 1,000	\$ 4,000		\$ 5,000
Total Estimated Core 2	\$ 1,000	\$ 16,500	\$ 7,500	\$ 25,000
3. Collaboration & Partnerships				\$ -
Regional Economic Development Strategy	\$ 5,000	\$ 65,000		\$ 70,000
Enhance Networking & Info Exchange	\$ 2,000	\$ 8,000		\$ 10,000
Economic Development Conferences	\$ 1,000	\$ 1,000		\$ 2,000
Total Estimated Core 3	\$ 8,000	\$ 74,000	\$ -	\$ 82,000
TOTAL BUDGET	\$ 50,000	\$ 100,000	\$ 143,000	\$ 293,000

Source: CRP Economic Development Forum, Annual Operations Plan 2008-2009

Note: \$43,000 has already been secured through Community Investment Support Program funding.

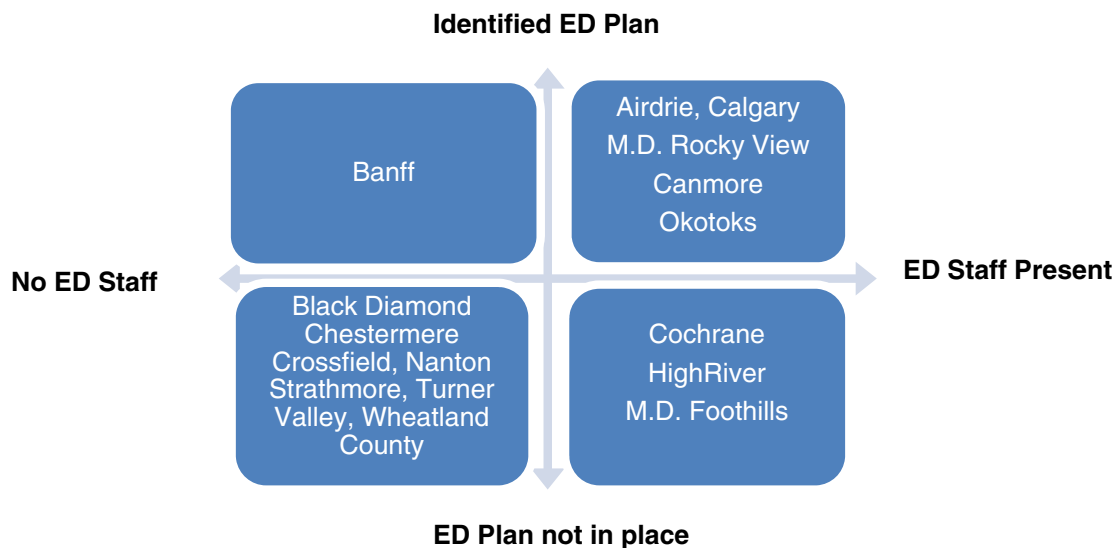
An additional \$100,000 application is being made for Rural Development Initiative funding.

4.2 Economic Development Capacity of Member Municipalities

As stakeholders in the EDF and contributors to the CRP, the members' ability to contribute from a human resource and strategy perspective will impact the EDF's effectiveness. It also has implications for the effective and efficient implementation of a regional economic development strategy.

To gain a greater understanding of the human resource capability and capacity of the CRP members with respect to current programming and economic development efforts, a review of members' websites and municipal development plans and strategic plans was conducted. The purpose of this review was to provide an understanding of the extent of dedicated economic development staffing in the Calgary Region as well as the current priorities and focus of local economic development efforts. Figure 22 is a simplified illustration of the status of the 16 members (excluding Tsuu T'ina Nation and Redwood Meadows) with respect to presence of economic development staff and identification of economic development strategic plans as distinct from municipal development plans.

Figure 22 – Member Municipality ED Staff and Strategic Planning



It is important to note that some municipalities may have identified economic development priorities within their municipal development plans but have not yet created an economic development strategic plan. When the development and progress on economic development priorities of the individual municipalities are included in the assessment, four tiers of capacity to contribute to the CRP EDF function become evident:

- Tier One communities are characterized as high capacity with engaged economic development staff and comprehensive ED strategic plans distinct from municipal operating plans. This group includes the municipalities of Airdrie, Canmore, Okotoks, and MD Rocky View.
- Tier Two communities are characterized as medium capacity with economic development committees and defined ED priorities as part of the municipal operating plans. This group includes the municipalities of High River, Cochrane, and MD Foothills.
- Tier Three communities are characterized by economic development committees but no clearly defined priorities. This group includes the communities of Strathmore, Turner Valley, Nanton, Chestermere, and, to some extent, Banff.
- Tier Four communities are characterized as having no economic development priorities identified and includes the municipalities of Black Diamond, Crossfield, and Wheatland County.

In reviewing municipal economic development strategies and priorities several commonalities emerge that may present opportunities for CRP to collaborate around target sector investment attraction and business growth, as well as project and best practices support that may be required by the member municipalities. The gaps identified in several communities, also present a starting point for discussion about how best to integrate these communities in the economic priorities of the region. This is summarized in Appendix V.

This review suggests that the tier one and tier two municipalities have clearly articulated priorities or themes for their economic development activities and program delivery, as well as a strong understanding on the whole of the target sector opportunities for growth and investment in their communities. Common economic development priorities include: business retention and expansion, business and entrepreneurial

support and sustainable growth while sector priorities include: Tourism, Transportation and Logistics Operations, Film Industries, Environmental Industries, Creative Industries, Value Added Agriculture, Manufacturing and Alternative Energy.

Other considerations range from downtown revitalization to support for home based businesses, and business park development.

This review should not be viewed as an exhaustive effort to identify economic development priorities for the Calgary Region. That should be achieved in dialogue with the member municipalities themselves. However, this assessment does provide considerable insight into the needs of the member municipalities as it relates to the direction and development of a regional economic development strategy.

4.2.1 Calgary Economic Development

The City of Calgary established Calgary Economic Development in October 2002 to “provide new leadership and a new direction for the Calgary Region's economic development activities. Working with stakeholders from business, the community, and government, our job is to capitalize on Calgary's abundant energy and entrepreneurial spirit to facilitate sustainable economic growth.” In 2007 Calgary Economic Development had revenues (and other income) of \$4,697,956; over 80% of which came directly from the City of Calgary. The agency is very well staffed with 32 employees working across 6 divisions as seen in figure 24.

Figure 23 – Calgary Economic Development Staffing

Division	Staff
Office of the President and CEO	2
Investment & Trade Development	8
Research, Workforce, & Strategy	7
Corporate & Community Engagement	5
Marketing & Communications	5
Finance & Administration	5
Total	32

Source: Calgary Economic Development Website

Calgary Economic Development provides an array of services to businesses and individuals within Calgary and across the globe including:

- Supporting Calgary business – through expediting permits and approvals, resolving conflicts and issues and connecting businesses.
- Developing Calgary's workforce – by working with public and/private partnerships to develop and attract a premier workforce for Calgary businesses through forecasting Calgary's current and projected labour requirements and promoting the benefits of a skilled and diverse workforce.
- Assisting Calgary companies to expand internationally – through facilitating strategic relationships at home and abroad; providing training and market evaluation services to identify export/import opportunities and supporting key trade missions; and marketing Calgary's business friendly environment globally.

- Growing small business in Calgary – working through The Business Link, to provide information on starting a business; export development; accessing public and private financing; small business mentoring; and access to government programs.
- Delivering site selection services – through a customized site selection process providing site due diligence for industrial and commercial land development; and addressing community-related factors critical to business investment decisions.
- Film production services – to liaise with local unions and guilds and to develop strong relationships with government, communities, and local companies in the film industry and to provide location assistance such as conducting regional familiarization tours, script review and scouting and to provide permits and application for filming in Calgary.
- Providing regional economic data – providing up-to-date information on Calgary's key sectors and other issues critical to Calgary's economic development through compiling key statistics and economic indicators and identifying trends. They also identify target opportunities for business development and delivering a Business Directory with an online search tool for Calgary companies, as well as providing community and lifestyle information.

In 2006, the Calgary Economic Development Strategy was developed through an assessment of Calgary's economic development strengths, weaknesses, opportunities, and threats. Building from imagineCalgary outputs, it identifies strategic sectors to focus Calgary's resources to be globally competitive. This ten-year strategy containing objectives and actions to ensure long-term prosperity was designed to be used as a guide in making long-term planning decisions, and to provide direction into the development of economic development agency work plans and budgets. Calgary Economic Development, Tourism Calgary, Calgary Technologies Inc., and Calgary TELUS Convention Centre are all expected to be aligned to the strategy.

The strategy allows Calgary to build on its strengths in the energy sector to grow and diversify the local economy into new areas of opportunity. In targeting their growth, the City of Calgary will focus on the following sectors for future economic prosperity: energy (including alternative energy, power distribution, and emissions reductions technology), financial services, health and wellness, transportation and logistics, environmental technologies, value added manufacturing, niche information and communication technology, creative industries, and tourism and conventions. In this respect there is considerable overlap with the other CRP members in the areas of energy and alternative energy, environmental technologies, creative industries, and tourism.

As a member of the Calgary Regional Partnership, Calgary Economic Development is also committed to working across the region to achieve wider economic development. To this end Calgary Economic Development has developed a number of initiatives which are being developed and delivered across a wider region. These include:

- **Teleworking Initiative** – Regional partners are working on a teleworking initiative to promote and develop greater teleworking which will benefit employees through an improved quality of life; employers through improved human resources, productivity, and operating costs; and municipalities through reduced strain on infrastructure and refocusing on community development.
- **Global Business Centre** – serving all of southern Alberta this centre will provide services to minimize the risk often associated with international trade activities. The centre will connect businesses and business forums, government agencies, and industry associations to develop, and coordinate international business initiatives. International business associations and foreign trade

offices will act as independent trade advisors to clients of the Global Business Centre. The centre will also act as the focal point for delegations looking for opportunities in Alberta.

- **Calgary Film Commissioner** – this role provides a variety of services for the entire region including location assistance and scouting; liaison with local unions and guilds; representation to government, councils, companies and individuals to assist the film production process; one-stop permit applications for shooting in the Calgary Region; and information and relationships with local accommodation, transport and logistics firms.

4.3 Community Futures Development Corporations (CFDC)

Community Futures Development Corporations are a federally initiated not for profit program, with a mission to develop and implement community-based economic development and diversification strategies to assist with growth in rural communities. There are 27 local Community Futures offices across the Province of Alberta, all are non-profit organizations run by a volunteer boards of directors and staffed with business professionals. The core services offered by Community Futures are: small business loans, community economic development, self employment program, entrepreneurs with disabilities program, and rural diversification initiative. As mentioned Community Futures are stakeholders to the EDF.

Though the boundaries do not completely match to those of the Calgary Regional Partnership there are three Community Future Development Corporations (CFDCs) active in the region; Highwood, Wild Rose and Centre West. Each of these Community Futures organisations has considerable potential to partner with and contribute to the economic development initiatives of the Calgary Regional Partnership. The three organisations employ a total of 25 people and have a combined annual budget of over \$1,600,000 (2008-2009), which comes primarily from Western Economic Diversification and provincial funding sources.

Figure 24 – CFDC Resourcing

CFDC	Staffing	Budget
Highwood	10 posts - 6 funded through Alberta Employment & Immig	\$ 414,579
Centre West	5 posts (1 part time) - 1 funded by Alberta Employment & Immigration	\$ 498,810
Wild Rose	10 posts (4 part time) - 5.5 funded by Alberta Employment & Immigration	\$ 720,000
Total	25 posts (5 part time) - 12.5 funded by Alberta Employment & Immigration	\$ 1,633,389

Source: Taken from individual CFDC Operational Plans period 2007-2008

As with all Community Futures organisations, the three in the Calgary Region undertake a wider range of activities to support community-based economic development in rural areas. The services they provide assist entrepreneurs and individuals in developing and growing their businesses to support the wider community's growth. The Region's community futures organisations have already been involved in a wide range of local and regional initiatives such as: Rosebud Infrastructure program (Wheatland County); strategic planning initiatives for High River and the M.D. of Foothills; and the development of a tourism strategy in Wheatland County.

Each of the Region's Community Futures organisations is also undertaking specific projects in community economic development, for example in 2008-2009 they have proposed the following projects in the Calgary Region:

- **Regional Business Investment Attraction Strategy** – Community Futures Highwood will work with all ten of its municipal stakeholders to provide each member with updated economic development marketing tools to promote their community on their own and as a regional alliance.
- **Western Watershed Climate Research Collaborative** – Community Futures Centre West is working with a range of public and private sector partners to establish a world class centre of excellence in climate change research in Canmore. This centre will investigate what climate change impact might occur, identify how they will impact on communities and the economy, and then propose best practice, technologies and policies to mitigate against them.

As the CFDC's provide a broad range of community and business support throughout the region their ability to develop strategic partnerships, attract investment, facilitate strategic planning, assist in rural revitalization, and provide loans to area businesses will be important to the Calgary Regional Partnership and the Economic Development Forum.

4.4 Summary of Findings

The preceding discussion illustrates there is significant economic development capability and support for economic development and a consistency of priorities that exists across the broader region. It will be critical for the Calgary Regional Partnership to identify where it can add value to this very active economic development environment. Particular attention should be paid to the strengths and strategies of the municipalities of Airdrie, Canmore, Cochrane, High River, Okotoks, MD Rocky View, and MD Foothills in the development of a regional economic development strategy.

Calgary Economic Development has also shown to be a clear leader in several regional initiatives including the marketing and promotion of the region. Finally, Community Futures is an active participant in CRP and contributes a great deal to the partnership functions through their local initiatives and financial support. Yet despite the considerable interest and investment in a regional approach to economic development, the efforts still lack a strong vision to effectively implement a regional economic development agenda.

The following strategy has been developed with the activities and capacities of the member municipalities and other economic development stakeholders in mind, looking for opportunities for the Calgary Regional Partnership to lead and where possible collaborate and support the activities of their members. It has also given consideration to where the members themselves can contribute to the strategies of the CRP.

In moving forward with the implementation of the strategy and in the determination of a more effective delivery model for regional economic development in the Calgary Region, consideration should also be given to capitalizing on the capacity and strengths of the member municipalities, (particularly Calgary Economic Development), as well as CRP's economic development partners (particularly Alberta Finance and Enterprise) to deliver aspects of a regional economic development agenda.

5 Calgary Regional Partnership Economic Development Strategy

Time spent in developing an economic development strategy will pay significant dividends to a community or region because it will:

1. **Outline the steps to follow.** Economic development does not just happen. It requires the community or region to identify a number of intermediate steps to reach its final goals.
2. **Promote efficient use of scarce resources.** A significant amount of money, time, and people will be required for economic development efforts and these limited resources must not be wasted. The plan will provide rationale for resource allocation.
3. **Improve coordination and collaboration.** Many programs, activities, groups, and stakeholders will be involved in the development effort and it is important that they not overlap or conflict. The plan will serve as a vehicle for communicating development activities.
4. **Build consensus.** The public and the private sector must agree on the major issues involved. This will lead to support in implementing the plan.
5. **Increase public awareness.** Without public support, economic development cannot happen. It is important that the public know how development occurs and how it affects a community or region.
6. **Strengthen the community or region's competitive position.** A community with a strategy will not only be inherently more likely to succeed, it will appear more attractive to potential business or industry than a community without a plan.
7. **Encourage forward-thinking.** A strategy will encourage community leaders to think about the future and to not overlook opportunities for development as they arise.

In preparing the Calgary Regional Partnership Economic Development Strategy we have built upon the original **VISION** established for the organization, taking into account the desire to have a connected and diverse economy that is both sustainable and forward-looking, while providing for new business and investment opportunities across the Calgary Region.

A key consideration in this regard was the need to establish the role of the Calgary Regional Partnership in matters of economic development. The resulting **MANDATE** for the CRP is built around 5 key themes that reflect the views of the CRP's Economic Development Forum and Executive Committee, as well as the input received from other economic development stakeholders, the general public and business community in the form of interviews, community surveys and focus group discussions.

The **STRATEGY** and **ACTIONS** that follow are built around two priority areas – the need to further develop the Region's target sector opportunities to capitalize on the economic potential of the Calgary Region, as well as the need for the Calgary Regional Partnership to play a stronger role in the development and implementation of sustainable economic development practices.

The Vision

We are **working together** to live in **balance** with a **healthy environment**, in **enriched communities**, with **sustainable infrastructure** and a **prosperous economy**.

Working Together

The citizens and leaders of the Calgary Region will feel connected and work proactively together to realize a common vision

Balance

The citizens and leaders of the Region will support each other to achieve community, environmental and economic balance.

Healthy Environment

We will protect natural areas that support biodiversity and rural/urban landscape forms to sustain clean air, water, healthy soil and habitat. The beauty of the Region will be preserved through a culture of conservation and a network of local and regional parks.

Enriched Communities

We will live in diverse communities that have access to services and opportunities. We will be healthy, engaged and educated. Residents will have access to diverse housing options in a safe environment that is inclusive, supportive and connected.

Sustainable Infrastructure

We will have regional development, infrastructure, transportation and waste management systems that are cost effective, efficient and minimize environmental impact. Services will be diverse, accessible and will regionally and municipally seek to achieve net zero waste and reduce consumption. Development patterns will reflect responsible and well coordinated land use planning.

Prosperous Economy

We will have connected diversified urban and rural economies with a workforce that is globally competitive. Our vibrant economy provides sustainable livelihood opportunities. Development patterns are environmentally, socially and financially sustainable.

The Mandate

In order for the Calgary Region to consolidate its position as a vibrant and successful regional economy, it is essential to manage the VISION for sustainable economic growth by pursuing strategies that help both our local and regional infrastructure cope with continued success and protect the social and environment well-being of the Region's residents.

Therefore, the **Key Themes** for the Calgary Regional Partnership **Economic Development Strategy** are:

Leadership and Advocacy

While many issues impacting our regional and local economies are beyond the influence of the CRP, the Partnership has an important role to play in representing the interests of the region; providing leadership, ensuring that there is a voice for the region and advocating for change. This may involve representation to member municipalities, to other public agencies, the provincial and federal levels of government.

Marketing and Promotion

One of the key advantages of regional co-operation and coordination is through the delivery of a strong message on the benefits of the wider region. CRP should have a role marketing and promoting the region to both external and internal audiences, demonstrating the strength of the region as a place to do business and assistance available. This activity is not intended to replace marketing and promotional efforts at a local level, but rather to augment and support these by illustrating the strength of the region as a whole.

Monitoring, Scanning and Intelligence

Critical in economic development is maintaining an understanding of the environment in which the economy is operating, as well as detailed information that can assist in delivering economic development activity. CRP will ensure that it has a strong research and analysis function to provide evidence and support for economic development activities, to identify new opportunities and to support future strategy development.

Capacity Building

Economic development capacity and capability varies significantly across the region. In order to deliver balanced growth across the region the Partnership should be assisting the member municipalities in developing and delivering economic development. This will include the sharing of best practices, ideas, and experiences among the member municipalities.

Project Support

CRP will remain involved and from time to time in project specific support in order to resolve issues constraining regional economic development and/or to provide evidence of the need or demand for select economic development activity through the development of pilot projects.

Strategy and Actions

The success of this **Strategy** will be judged by whether the Calgary Region has an economy that generates the **prosperity** needed to support a high **quality of life** for all of the Region's people and communities and makes the most efficient possible use of the resources available to it.

Target Sector Priorities

Objective: The Strategy will build on the core competencies that will attract and sustain business investment in the Calgary Region enabling more people to live and work locally. Collectively, we will create strategies that will achieve the goal of net job growth in the Calgary Region and respond to new industries and investment opportunities as they arise.

1) Building Products

Goal: To lead the province in the attraction of manufacturing investment in the emerging green building products sector and in the integration and use of green building products and technologies.

Actions:

1. Working in conjunction with economic development partners, maintain an up to date building products cluster profile and business investment case with which to attract business interest to the Calgary Region.
2. Implement a multi-year marketing campaign that consistently reaches the target sector audience.
 - i. Undertake a lead generation effort in partnership with economic development partners to identify and pre-qualify investment attraction opportunities in the Building Products sector.
 - ii. Publish a printed piece that outlines the business case for the Calgary Region and also ensure it is published on the CRP website.
 - iii. Develop a testimonial based promotional campaign that highlights regional success stories.
3. Demonstrate leadership in the development and attraction of green building products and materials manufacturers for residential, commercial and industrial use.
4. Promote the use of green building products and materials by hosting an international symposium geared to educating business and industries in the Calgary Region on the emerging global demand and opportunities for green products and the impact of the green economy.
5. Build on international best practices by supporting pilot projects that integrate a green approach to development, as a way to influence the greening of the province's building code.

6. Develop a communications plan to promote initiatives, celebrate developments and influence opinion on building product manufacturing in the Calgary Region.

2) Transportation and Logistics

Goal: To enhance Calgary Region's position as a key North American transportation and logistics centre.

Actions:

1. Support the positioning of Calgary International Airport and the surrounding industrial and commercial lands as a global logistics centre for high-value, time sensitive goods, incorporating opportunities with multi-modal, including road, rail and air.
2. Working in conjunction with economic development partners, maintain an up to date transportation and logistics cluster profile and business investment case with which to attract business interest and to support activities for transportation and logistics operations in the Calgary Region, including:
 - i. Labour force and business costs
 - ii. Map land availability size and location
 - iii. Utility costs and availability
 - iv. Regional skills base
 - v. Total cost implications, etc.
3. In partnership with CED and MD of Rockyview, pursue opportunities to develop the creation of an international aerospace hub at Springbank airport including a personal aircraft manufacturing facility, and the expansion of Calgary's unmanned vehicle systems (UVS) sector.
4. Implement a multi-year promotional campaign that consistently reaches the target sector audience that reflects the growing consumer market in the Calgary Region and the region's location on the Canamex highway and the Asia Pacific gateway corridor.
 - i. Undertake a lead generation effort in partnership with economic development partners to identify and pre-qualify investment attraction opportunities in the Transportation and Logistics sector.
 - ii. Develop and publish a printed piece that outlines the business case for the Calgary Region and also ensure it is published on the CRP website.
 - iii. Develop a testimonial based promotional campaign that highlights regional success stories.
5. Develop a communications plan to promote initiatives, celebrate developments and influence opinion on the investment potential associated with the transportation and logistics sector.

3) Agri-Business and Food Industries

Goal: To ensure that our agriculture and food industries are globally competitive, profitable, and sustainable.

Actions:

- 1) Undertake an integrated food strategy for the Calgary Region giving consideration to local food options, slow food, small processors, food manufacturing, eat fresh, buy local opportunities and greenhouse development. Discuss opportunities to develop the initiative as a pilot project for other regions of the province.
 - i. Define the unique strengths of Calgary Region agriculture and based on these, identify the priority research and development, business management, technological and marketing requirements to enable this sector to increase in profit and contribution to the Calgary Region economy.
 - ii. Work with economic development stakeholders to develop a Calgary Region population profile that identifies emerging consumer groups and opportunities to cater to changing cultural diversity and population in the Calgary Region.
- 2) Undertake a lead generation effort in partnership with economic development partners to identify and pre-qualify investment attraction opportunities in the food processing/food manufacturing sector.
 - i. Build value by targeting higher-margin/-value consumer products and more effective participation in global value chains. This is achieved by fostering/developing and promoting innovation and technology convergence, whether in processing or services.
- 3) Implement a multi-year promotional campaign that consistently reaches the target audience.
 - i. Publish a printed piece that outlines the business case for the Calgary Region and also ensure it is published on the CRP website.
 - ii. Develop a testimonial based promotional campaign that highlights regional success stories.
- 4) Maintain a regional sector profile that provides an understanding of the regional business climate and business support activities for agriculture and food processing/manufacturing that includes:
 - i. A Calgary Region Agricultural profile
 - ii. Labour force and business costs
 - iii. Land availability size and location
 - iv. Utility costs and availability
 - v. Regional skills base
 - vi. Total cost implications

- vii. Develop profiles of successful entrepreneurs in this sector as part of a comprehensive cluster profile.
- 5) Take the lead on the development of alternative forms of energy in the Calgary Region by promoting the generation of green energy among agri-food stakeholders and ensuring that green energy knowledge (e.g. information about bio-digestion) is accessible to stakeholders.
- 6) Develop a communications plan to promote initiatives, celebrate developments and influence opinion on export involvement.

4) Tourism

Goal: To have the Calgary Region recognized for its vibrant tourism industry, with its communities offering a unique, diverse range of rural, natural and cultural tourism experiences.

Actions:

1. Work with economic development stakeholders to monitor and report on emerging tourism trends. Promote sharing of knowledge and best practice between tourism operators and organizations.
2. Undertake a cultural asset mapping process that identifies the range of assets within the Calgary Region (e.g. heritage, natural environment, arts and culture). Use the opportunity to share an appreciation for the value of these assets with regional tourism operators as well as the general public and gain an understanding what supports and threatens their sustainability.
3. Support the development of a Regional Tourism Strategy that builds on Calgary Region's assets in order to sustain and enhance them for future generations. Include a comprehensive marketing plan for reaching residents and visitors to the Calgary Region.
4. Partner with Tourism Calgary, as well as other tourism organizations to improve the marketing of Calgary Region's tourism assets and further develop its capacity to host special events, both cultural and sporting, leveraging off existing and proposed facilities.
5. Enhance the community content information on the Calgary Regional Partnership website by including a regional tourism directory page with web links to other agencies and municipalities as well as a comprehensive and visible regional tourism/arts and cultural calendar and visual map of the Region's galleries, artist's studios, cultural attractions etc.
6. Work with economic development stakeholders to increase the appeal of less visited parts of Calgary Region.

Strategic Economic Development Priorities

Objective: The Calgary Regional Partnership will be a strong advocate of sustainable economic development practices and the primary source for regional economic development information and strategic intelligence on the Calgary Region for both our members and other economic development stakeholders.

1) Building a Sustainable Region

Goal: To deliver healthy, sustainable, and high quality communities by supporting investment in infrastructure and our urban environments, collaborating around economic development and uniting behind a common vision for the Calgary Region.

Actions:

1. Strongly advocate for the implementation of regional strategies, including the Calgary Regional Plan. This includes the provision of adequate funding, coordination and capacity planning of transport (public and private), storm water management, wastewater, energy and telecommunications to help ensure an efficient and clean region.
2. Support the provision of an adequate supply of commercial and industrial land within the Region's planned compact urban nodes and commercial/industrial corridors to ensure the region is meeting the needs of the overall economy, including its critical industry clusters.
 - a. Take a leadership role in the development of transit oriented development plans to ensure that economic development is given a prominent consideration in their implementation.
 - b. Work in conjunction with member communities to undertake a regional commercial/industrial land needs assessment.
3. Prepare a brochure that describes the relationships of economic development, environmental protection, and social responsibility in the Calgary Region, for use by municipalities, businesses and other enterprises that operate in—or plan to relocate to the Region. The brochure should contain key sustainability concepts drawn from the Regional Plan as well as other plans, and should be seen as a statement of what residents and jurisdictions expect of enterprises operating here and the future of their communities.
4. Support the attraction and development of green collar jobs to the Calgary Region by investing in green public infrastructure, encouraging the province to invest in training to build new skills for a new 'green' economy and provide incentives to make businesses, homes and buildings more energy and waste efficient.
5. Conduct more definitive economic analysis that identifies business and industry relationships within the Calgary regional economy and the higher-value business and industry clusters and cluster segments opportunities. (e.g. green economy, creative economy).

6. Work with economic development stakeholders to identify and support specific initiatives in industries that are primed for growth, as determined by market demand, economic opportunities, breakthrough research and critical mass of talent.
7. Assist with community campaigns and other special issues that benefit economic development and the Calgary Region's business climate.

2) Supporting Entrepreneurial Growth

Objective: To create strong partnerships through cooperation and collaboration with other economic development stakeholders to ensure a healthy and vibrant business community and support for the growth of our entrepreneurs.

Actions:

1. Support the development of strong local and regional networks (inter-company, inter-industry and inter-institutional) through:
 - i. The provision of regular forums for the discussion of regional economic development issues and opportunities for collaboration between the Region's economic development stakeholders.
 - ii. Identifying opportunities for inter-sector and intercommunity networking.
 - iii. Develop an ongoing knowledge of existing and potential economic development activities associated with Calgary First Nations communities.
 - iv. Strengthen business networks with Calgary Region's First Nation communities.
2. Maximize opportunity for economic growth and job creation in the Calgary Region by developing a standardized Business and Retention + Expansion Tool Kit (survey, database, implementation manual, training workshops etc.) for use by municipalities in the Calgary Region.
 - i. Collect and analyze the data from the community surveys to gain a better understanding of the barriers and opportunities confronting business and industry in the Calgary Region as a whole.
 - ii. Identify infrastructure and service issues and requirements that support Calgary Region's key industries.
 - iii. Provide regular reporting on the findings to the CRP communities, as well as other economic development stakeholders.
 - iv. In partnership with stakeholders, work to develop strategies that respond to issues facing business enterprises in the Calgary Region.
 - v. Promote wider community awareness of entrepreneurship by supporting programmes which identify and reward leading entrepreneurs from a wide variety of enterprise and cultures (including promoting role models, mentoring, and establishing regional business enterprise awards).

3. Promote the presence of Calgary's Global Business Centre and work with CED to host regional forums for business, government agencies and industry associations to discuss, develop and coordinate international business initiatives in the Calgary Region.
4. Develop a regional business angels or venture capital network, to assist entrepreneurs and small businesses to access capital for starting up and expanding businesses.
5. Identify best practices aimed at nurturing community based enterprises and partnerships.
 - i. Support the development of community or regional based leadership programs that are directed at building a new generation of leaders and innovators in the Calgary Region.
6. Develop a list of the "50 People We'll Need to Know in 10 Years" – and then work to meet and interact with them today, in order to lay a strong foundation for future economic development efforts.

3) A Commitment to Workforce Development

Objective: To provide the Calgary Region with a high quality and skilled workforce in support of a growing regional economy, by supporting efforts to increase the region's competitiveness.

Actions:

1. Develop a coordinated regional labour force strategy in partnership with CED that examines current and future labour force requirements and develops tangible actions in order to advance Calgary Region's competitive position in the global economy.
2. Identify emerging industry sectors and specialized growth niches within existing sectors and identify business and industry needs and support their growth and development.
3. Support CED's efforts to implement its teleworking initiative and the development of satellite distributed work centres in region, as a way to support workforce attraction and retention efforts in the Calgary Region.
 - i. Continue to educate regional businesses and industries on how they can use telework opportunities and how it can benefit their business.
 - ii. Give consideration to the development of a business incubator in conjunction with the development of a distributed work centre in the Calgary Region.
4. Make a strong commitment to ensuring the long term competitiveness of Calgary Region's workforce by compiling, analyzing and communicating meaningful labour information that can direct skills training and workforce attraction efforts regionally and locally.
5. Work with economic development stakeholders to create, implement and manage activities to assure that Calgary Region will have the highest quality educated and skilled workforce possible.
6. Secure a post secondary presence to the Calgary Region in the form of a satellite campus or distance learning facility.

- i. Give consideration to the range of programming associated with the emergence of environmental and green industries that would enable Calgary Region to capitalize on this growing demand as well as its local agricultural/rural economy.

4) Developing a Regional Economic Identity

Objective: To develop an identifiable, dynamic and consistent marketing message that promotes Calgary Region business and industrial strengths, the quality of its workforce and its exceptional liveability factors.

Actions:

1. Develop a corporate marketing identity for the Calgary Regional Partnership's Economic Development function that compliments regional priorities.
2. Develop and implement a focused marketing strategy based on the strengths of the Region's business and industry sectors, the quality of life appeal to families and visitors and opportunities for growth and investment.
3. Develop consistent messaging and proactive communications initiatives that highlight opportunities and advancements in the Calgary Region's targeted and emerging industry sectors.
 - i. Develop a quarterly newsletter for distribution to partnership communities, economic development stakeholders, as well as the business community that highlights economic development successes throughout the Calgary Region and profiles its business community and entrepreneurs.
 - ii. Prepare regular press releases on the events and activities of the Calgary Region that contribute to an understanding of the range of opportunities for business and investment.
4. Deliver marketing support and market research that responds to the needs of our constituents and our investment opportunities.
 - i. Work in tandem with Calgary Economic Development to assemble and maintain high quality, reliable and comparable data that demonstrate demographic and operating cost comparisons for the Calgary Region and its municipalities.
5. Strongly communicate the 'Quality of Place' aspects that support the workforce of the future to business decision-makers and potential employees.
6. Target lifestyle entrepreneurs as part of the regional marketing campaign, in particular those types of entrepreneurs that have a tendency to freelance, telecommute, or start a business locally. (e.g. professional service firms, web and software developers etc.).
7. Work in partnership with Calgary Economic Development to effectively brand and market the broader economic region as a premier location for people and business.
8. Work with the municipal partners to develop a single web-based business portal that gathers economic, planning, utility, geographic and demographic information into one dynamic resource.

Available commercial and industrial sites from across the Calgary Region are entered and updated on an ongoing basis.

Appendix I

North American Industrial Code System

North American Industrial Classification System (NAICS)

Sector Definitions

Agriculture, Forestry (NAICS 11)

This sector comprises establishments primarily engaged in growing crops, raising animals, harvesting timber, harvesting fish and other animals from their natural habitats and providing related support activities.

Establishments primarily engaged in agricultural research or that supply veterinary services are not included in this sector.

Mining and Oil and Gas Extraction (NAICS 21)

This sector comprises establishments primarily engaged in extracting naturally occurring minerals. These can be solids, such as coal and ores; liquids, such as crude petroleum; and gases, such as natural gas.

The term *mining* is used in the broad sense to include quarrying, well operations, milling (for example, crushing, screening, washing, or flotation) and other preparation customarily done at the mine site, or as a part of mining activity.

Establishments engaged in exploration for minerals, development of mineral properties and mining operations are included in this sector. Establishments performing similar activities, on a contract or fee basis, are also included.

Construction (NAICS 23)

This sector comprises establishments primarily engaged in constructing, repairing and renovating buildings and engineering works, and in subdividing and developing land. These establishments may operate on their own account or under contract to other establishments or property owners.

Manufacturing (NAICS 31-33)

This sector comprises establishments primarily engaged in the physical or chemical transformation of materials or substances into new products. These products may be finished, in the sense that they are ready to be used or consumed, or semi-finished, in the sense of becoming a raw material for an establishment to use in further manufacturing.

Related activities, such as the assembly of the component parts of manufactured goods; the blending of materials; and the finishing of manufactured products by dyeing, heat-treating, plating and similar operations are also treated as manufacturing activities.

Manufacturing establishments are known by a variety of trade designations, such as plants, factories or mills. Manufacturing establishments may own the materials which they transform or they may transform materials owned by other establishments. Manufacturing may take place in factories or in workers' homes, using either machinery or hand tools.

Wholesale Trade (NAICS 41)

This sector comprises establishments primarily engaged in wholesaling merchandise and providing related logistics, marketing and support services. The wholesaling process is generally an intermediate step in the distribution of merchandise; many wholesalers are therefore organized to sell merchandise in large quantities to retailers, and business and institutional clients. However, some wholesalers, in particular those that supply non-consumer capital goods, sell merchandise in single units to final users.

This sector recognizes two main types of wholesalers, that is, wholesale merchants and wholesale agents and brokers.

Retail Trade (NAICS 44-45)

The retail trade sector comprises establishments primarily engaged in retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise.

The retailing process is the final step in the distribution of merchandise; retailers are therefore organized to sell merchandise in small quantities to the general public. This sector comprises two main types of retailers, that is, store and non-store retailers.

Information and Cultural Industries (NAICS 51)

This sector comprises establishments primarily engaged in creating and disseminating (except by wholesale and retail methods) information and cultural products, such as written works, musical works or recorded performances, recorded dramatic performances, software and information databases, or providing the means to disseminate them. Establishments that provide access to equipment and expertise to process information are also included.

The main components of this sector are the publishing industries (except exclusively on Internet), including software publishing, the motion picture and sound recording industries, the broadcasting industries (except exclusively on Internet), the internet publishing and broadcasting industries, the telecommunications industries, the internet service providers, web search portals, data processing industries, and the other information services industries.

Finance and Insurance (NAICS 52)

This sector comprises establishments primarily engaged in financial transactions (that is, transactions involving the creation, liquidation, or change in ownership of financial assets) or in facilitating financial transactions. Included are:

- Establishments that are primarily engaged in financial intermediation. They raise funds by taking deposits and/or issuing securities, and, in the process, incur liabilities, which they use to acquire financial assets by making loans and/or purchasing securities. Putting themselves at risk, they channel funds from lenders to borrowers and transform or repackage the funds with respect to maturity, scale and risk.
- Establishments that are primarily engaged in the pooling of risk by underwriting annuities and insurance. They collect fees (insurance premiums or annuity considerations), build up reserves, invest those reserves and make contractual payments. Fees are based on the expected incidence of the insured risk and the expected return on investment.
- Establishments that are primarily engaged in providing specialized services that facilitate or support financial intermediation, insurance and employee benefit programs.

In addition, establishments charged with monetary control - the monetary authorities - are included in this sector.

Real Estate and Rental Leasing (NAICS 53)

This sector comprises establishments primarily engaged in renting, leasing or otherwise allowing the use of tangible or intangible assets.

Establishments primarily engaged in managing real estate for others; selling, renting and/or buying of real estate for others; and appraising real estate, are also included

Professional, Scientific and Technical Services (NAICS 54)

This sector comprises establishments primarily engaged in activities in which human capital is the major input. These establishments make available the knowledge and skills of their employees, often on an assignment basis.

The main components of this sector are:

- legal services industries;
- accounting and related services industries;
- architectural, engineering and related services industries;
- surveying and mapping services industries;
- design services industries;
- management, scientific and technical consulting services industries;

- scientific research and development services industries;
- advertising services industries.

The distinguishing feature of this sector is the fact that most of the industries grouped in it have production processes that are almost wholly dependent on worker skills. In most of these industries, equipment and materials are not of major importance. Thus, the establishments classified in this sector sell expertise.

Management of Companies and Enterprises (NAICS 55)

This sector comprises establishments primarily engaged in managing companies and enterprises and/or holding the securities or financial assets of companies and enterprises, for the purpose of owning a controlling interest in them and/or influencing their management decisions.

They may undertake the function of management, or they may entrust the function of financial management to portfolio managers

Educational Services (NAICS 61)

This sector comprises establishments primarily engaged in providing instruction and training in a wide variety of subjects. This instruction and training is provided by specialized establishments, such as schools, colleges, universities and training centres.

These establishments may be privately owned and operated, either for profit or not, or they may be publicly owned and operated. They may also offer food and accommodation services to their students.

Health Care and Social Assistance (NAICS 62)

This sector comprises establishments primarily engaged in providing health care by diagnosis and treatment, providing residential care for medical and social reasons, and providing social assistance, such as counselling, welfare, child protection, community housing and food services, vocational rehabilitation and child care, to those requiring such assistance.

Arts, Entertainment and Recreation (NAICS 71)

This sector comprises establishments primarily engaged in operating facilities or providing services to meet the cultural, entertainment and recreational interests of their patrons. These establishments produce, promote or participate in live performances, events or exhibits intended for public viewing; provide the artistic, creative and technical skills necessary for the production of artistic products and live performances; preserve and exhibit objects and sites of historical, cultural or educational interest; and

operate facilities or provide services that enable patrons to participate in sports or recreational activities of pursue amusement, hobbies and leisure-time interests.

Accommodation and Food Services (NAICS 72)

This sector comprises establishments primarily engaged in providing short-term lodging and complementary services to travellers, vacationers and others, in facilities such as hotels, motor hotels, resorts, motels, casino hotels, bed and breakfast accommodation, housekeeping cottages and cabins, recreational vehicle parks and campgrounds, hunting and fishing camps, and various types of recreational and adventure camps.

This sector also comprises establishments primarily engaged in preparing meals, snacks and beverages, to customer order, for immediate consumption on and off the premises

Public Administration (NAICS 91)

This sector comprises establishments primarily engaged in activities of a governmental nature, that is, the enactment and judicial interpretation of laws and their pursuant regulations, and the administration of programs based on them.

Legislative activities, taxation, national defence, public order and safety, immigration services, foreign affairs and international assistance, and the administration of government programs are activities that are purely governmental in nature.

Appendix II

Calgary Region – Creative Economy Establishments

Calgary Region Creative Economy Industry Categories and NAICs Codes

EMP. SIZE RANGE PROV/CSD NAT. INDUSTRIES	CRP: 2003	CRP 2008	Percentage Change
Total	910	1051	15.5%
Advertising	16	15	-6.3%
541810 - Advertising Agencies	10	8	-20.0%
541840 - Media Representatives	1	0	-100.0%
541850 - Display Advertising	2	3	50.0%
541899 - All Other Services Related to Advertising	3	4	33.3%
Architecture	20	25	25.0%
541310 - Architectural Services	12	18	50.0%
541320 - Landscape Architectural Services	8	7	-12.5%
Artists	7	26	271.4%
453920 - Art Dealers	7	12	71.4%
711511 - Independent Artists, Visual Arts	0	1	-
711512 - Independent Actors, Comedians and Performers	0	7	-
711513 - Independent Writers and Authors	0	6	-
Business Consulting	236	219	-7.2%
541611 - Administrative Management and General Management Consulting Services	176	158	-10.2%
541612 - Human Resource and Executive Search Consulting Services	16	12	-25.0%
541619 - Other Management Consulting Services	44	49	11.4%
Design	26	41	57.7%
541410 - Interior Design Services	9	15	66.7%
541420 - Industrial Design Services	6	12	100.0%
541430 - Graphic Design Services	9	11	22.2%
541490 - Other Specialized Design Services	2	3	50.0%
Education	21	24	14.3%
611210 - Community Colleges and C.E.G.E.P.s	3	3	0.0%
611420 - Computer Training	6	5	-16.7%
611430 - Professional and Management Development Training	8	12	50.0%
611610 - Fine Arts Schools	4	4	0.0%

Engineering	350	422	20.6%
541330 - Engineering Services	212	231	9.0%
541620 - Environmental Consulting Services	22	41	86.4%
541690 - Other Scientific and Technical Consulting Services	103	141	36.9%
541710 - Research and Development in the Physical, Engineering and Life Sciences	9	4	-55.6%
541720 - Research and Development in the Social Sciences and Humanities	4	5	25.0%
Film	20	15	-25.0%
512110 - Motion Picture and Video Production	15	10	-33.3%
512130 - Motion Picture and Video Exhibition	3	4	33.3%
512190 - Post-Production and Other Motion Picture and Video Industries	2	1	-50.0%
Games	3	3	0.0%
414460 - Toy and Hobby Goods Wholesaler-Distributors	3	3	0.0%
Heritage	2	4	100.0%
712130 - Zoos and Botanical Gardens	0	1	-
712190 - Other Heritage Institutions	2	3	50.0%
Marketing	2	3	50.0%
541490 - Other Specialized Design Services	2	3	50.0%
Museums	10	16	60.0%
712111 - Non-Commercial Art Museums and Galleries	1	0	-100.0%
712115 - History and Science Museums	0	2	-
712119 - Museums (except Art Museums and Galleries)	3	6	100.0%
813210 - Grant-Making and Giving Services	6	8	33.3%
Music	3	2	-33.3%
512230 - Music Publishers	2	1	-50.0%
512240 - Sound Recording Studios	1	0	-100.0%
512290 - Other Sound Recording Industries	0	1	-

Performing Arts	14	11	-21.4%
711111 - Theatre (except Musical) Companies	2	0	-100.0%
711112 - Musical Theatre and Opera Companies	1	1	0.0%
711130 - Musical Groups and Artists	2	2	0.0%
711311 - Live Theatres and Other Performing Arts Presenters with Facilities	0	1	-
711319 - Sports Stadiums and Other Presenters with Facilities	2	1	-50.0%
711321 - Performing Arts Promoters (Presenters) without Facilities	1	1	0.0%
711322 - Festivals without Facilities	1	1	0.0%
711329 - Sports Presenters and Other Presenters without Facilities	2	2	0.0%
711410 - Agents and Managers for Artists, Athletes, Entertainers and Other Public Figures	3	2	-33.3%
Photographic Services	12	20	66.7%
541920 - Photographic Services	12	20	66.7%
Public Relations	4	4	0.0%
541820 - Public Relations Services	4	4	0.0%
Radio & Television	2	5	150.0%
515110 - Radio Broadcasting	2	4	100.0%
515120 - Television Broadcasting	0	1	-
Web & Software	162	196	21.0%
511210 - Software Publishers	1	5	400.0%
517210 - Wireless Telecommunications Carriers (except Satellite)	1	1	0.0%
518210 - Data Processing, Hosting and Related Services	5	4	-20.0%
519190 - All Other Information Services	1	2	100.0%
541510 - Computer Systems Design and Related Services	154	184	19.5%

Source: Statistics Canada, Canadian Business Patterns Data: June 2003, 2008

Appendix III

Focus Group Results

CALGARY REGIONAL PARTNERSHIP

**ECONOMIC DEVELOPMENT FOCUS GROUP HIGHLIGHTS
FEBRUARY 17-20, 2009
REVISION 0**

Participants:
See participant list
In Association with:
Millier Dickenson Blais
Queen's University Executive Decision Centre
Facilitator: Erik Lockhart
Ph#: 613 533-6681
E-mail: elockhart@business.queensu.ca

Table of Contents

Executive Summary	3
1.0 – Strength and Assets of the region	5
1.1 – Cochrane & area.....	5
1.2 – Okotoks & area.....	6
1.3 – Airdrie & area.....	8
1.4 – EDOs.....	9
2.0 - Tools.....	11
2.1 - Cochrane.....	11
3.0 – Opportunities to stimulate economic development	12
3.1 – Cochrane & area.....	12
3.2 – Okotoks & area.....	14
3.3 – Airdrie & area.....	16
3.4 – EDOs.....	18
3.5 – Executive	20
4.0 – Action plans	22
4.1 – Cochrane & area.....	22
4.2 – Okotoks & area.....	23
4.3 – Airdrie & area.....	25
4.4 – EDOs.....	28
5.0 – Roles of the CRP	31
5.1 - EDOs.....	31
5.2 – Executive	32
Appendices	33
A – Session Overview.....	33
B – Participants (Okotoks)	34
C – Participants (Airdrie).....	34
D – Participants (EDOs)	35
E – Brainstorm action plans by category (Airdrie)	35
F – Brainstorm action plans by category (EDOs)	38
G – Process Overview	41

Executive Summary

Attached are meeting proceedings from the Calgary Regional Partnership economic development focus groups held on February 17-20, 2009 in Cochrane & area, Okotoks & area and Airdrie & area. The purpose of the focus groups was to complement the stakeholder consultations and interviews by asking community representatives about economic development opportunities and challenges in the region. Each group was asked:

1. What unique strengths and assets does the region have to attract/sustain economic growth and investment in the future?
2. What opportunities are there to stimulate new economic growth, investment and interest in the region?
3. Implementation. How do we make this happen? Suggest 1-2 specific actions (e.g. projects, tools etc.) for each opportunity?

In addition, focus groups were held with EDOs and elected officials in the region who were also asked:

- What are the roles of the CRP?

This document contains the raw meeting proceedings. The summary below is a high level summary of the findings across the three areas.

Strengths and Assets	Coch/12	Okot/23	Air/13	EDO/12	Total/60
Location: proximity to transport corridors, mountains, recreation	8	17	10	7	42
Entrepreneurial people: "wildcat", can-do attitude		15	7	7	29
Affordability: Available land and services	2	9	8	6	25
Demographics: young, family-oriented	5	7	8		20
Favourable business environment: lower taxes		6	8	5	19
Eco-friendly: Green, clean living, sustainability principles	5	6	2	6	18

Opportunity areas for Economic Development	Coch/12	Okot/23	Air/13	EDO/12	Total/60
Transportation systems, warehouse logistics	6	11	9	6	35
Green, environmental products & services: alternative energy, wind, solar, promote green living	8	16		7	31
Tourism: attract people to area through events, festivals, facilities, sports, culture, arts etc	2	18	5	4	29
Diversification beyond energy, manufacturing etc.		16	4	4	24
Infrastructure: water, sewer, roads etc	10		9	4	23
Agriculture, food processing	6	6	4	6	22
Marketing & promotion to attract business	7	7	6		20

Editor's Notes:

- a. The notes in this Executive Summary provide a summary of the findings from each session. Given the variety in each focus group, the summary above should be considered directional in nature and is by no means a scientific comparison.
- b. The symbol // indicates that two similar ideas have been merged together.
- c. This document contains the meeting proceedings and is not intended as a "Final Report"

1.0 – Strength and Assets of the region

What unique strengths and assets does the Region have to attract/sustain economic growth and investment in the future?

Note: the group brainstormed ideas, discussed and merged similar items and then prioritized based on the most important

1.1 – Cochrane & area

Voting Results

Multiple Selection (maximum choices = 3) (Allow bypass)

Number of ballot items: 9

Total number of voters (N): 12

Total

- 9 1. Transportation including highway infrastructure, proximity to airport, rail etc.
- 8 2. Proximity to mountains - excellent recreational options in and around Cochrane ...tourism, desirable living location //Topography is attractive to residents living here, along with the resources (wind, geothermal, water, oil/gas, etc) ...Resort locations in close proximity
- 5 3. Green Living - Amount of annual sunshine - could support more local greenhouses/green living - wind generation
- Utilize the wealth of natural resources that we are blessed with in this region including the prevalence of strong Chinook winds, ample sunlight year round, abundance of clean water and geothermal to augment and supplement the fossil fuel energy sources in our Province. Minimize dependence upon and unbalanced dependency on fossil fuels to extend this resource to where it is most needed for a longer period of time. Help reverse the adverse effects on our environment and health of emissions. Choosing clean and green and free source sustainable power sources is good for preserving our environment, air quality and health!
- 4 4. Demographics - age, education, cultural... Residents of Cochrane & area are a resource - higher education, entrepreneurial spirit, etc. are forward thinking in how to develop new ideas and make them into economic reality. Our financial status as a province is an asset to that
- 2 5. Available land for growth/expansion
- 2 6. Opportunity to attract larger businesses/industry
- 2 7. An important aspect of our community is the safety aspect - families feel safe, it is a family friendly community with a relatively low crime rate, especially when comparing with different communities from other parts of the world
- 1 8. Great diversity of local business and employment locally

Note: prior to voting, the group brainstormed ideas and then merged the similar items. Below in non-bold are the merged items. These items are ordered as they were originally brainstormed (i.e. not as they were ranked by the group). Items that did not have any ideas merged are not included.

4. Transportation including highway infrastructure, proximity to airport, rail etc.

Transportation corridors - air, road and rail

6. Green Living - Amount of annual sunshine - could support more local greenhouses/green living - wind generation

- Utilize the wealth of natural resources that we are blessed with in this region including the prevalence of strong Chinook winds, ample sunlight year round, abundance of clean water and geothermal to augment and supplement the fossil fuel energy sources in our Province. Minimize dependence upon and unbalanced dependency on fossil fuels to extend this resource to where it is most needed for a longer period of time. Help reverse the adverse effects on our environment and health of emissions. Choosing clean and green and free source sustainable power sources is good for preserving our environment, air quality and health!

Use the wealth that the province has now to develop the green energy/ living that is going to be required in the future. Use our great location to our advantage other than just tourism.

1.2 – Okotoks & area

What unique strengths and assets does the Region have to attract/sustain economic growth and investment in the future?

Voting Results

Multiple Selection (maximum choices = 5) (Allow bypass)

Number of ballot items: 16

Total number of voters (N): 24

Total

- 17 1. Location ...Close proximity to Calgary ..Market to the States
- 16 2. Lifestyle - work, life balance - recreational opportunities, community ...Year Round Playground - Region's Image... regional rec facilities
- 15 3. Entrepreneurial Back Ground/ Wildcatters ...Progressive Thinking People which creates variety of businesses ...Can-Do Attitude ... People-Diversification with broad backgrounds and skill sets... Job creation track record
- 11 4. Diverse Sector Strength/Potential (multiple competitive econ sectors -- tourism, IT, O&G, transport logistics)
- 9 5. Affordable land and services ..Potential for growth
- 8 6. Access to excellent infrastructure ..Road / Transportation Infrastructure ...Pedestrian & Car friendly
- 7 7. Favourable demographic profile (conducive to econ growth)... Youthful workforce with high disposable income. e.g. Engineering Talent
- 6 8. Eco friendly community ...adhere to Sustainability Principles
- 6 9. Competitive Business Cost Environment
- 5 10. Skilled & Highly educated labour pool
- 5 11. Industry - i.e.: ranching/oil & gas
- 4 12. Global Awareness (of Calgary and the region)

- 4 13. Small town feel/quality of life
- 2 14. Access to post secondary education in Calgary
- 0 16. Cost of living (except housing)

Note: prior to voting, the group brainstormed ideas and then merged the similar items. Below in non-bold are the merged items. These items are ordered as they were originally brainstormed (i.e. not as they were ranked by the group). Items that did not have any ideas merged are not included.

11. Diverse Sector Strength/Potential (multiple competitive econ sectors -- tourism, IT, O&G, transport logistics)

Diverse economy
Tourist attractions

12. Access to excellent infrastructure ..Road / Transportation Infrastructure ...Pedestrian & Car friendly

Good road infrastructure and planning

14. Affordable land and services ..Potential for growth

Abundant Lands

1.3 – Airdrie & area

Voting Results

Multiple Selection (maximum choices = 6) (Allow bypass)

Number of ballot items: 20

Total number of voters (N): 13

Total

- 10 1. proximity to major transportation systems i.e. highway, airport ...On main Calgary-Edmonton corridor //We're close to Calgary, to the Calgary airport. No transit link to Calgary though - it's a massive problem for attracting lower paid members of the workforce who otherwise might bus to Airdrie if the opportunity was available.
- 8 2. lower tax base than Calgary ...We have no business tax in Airdrie!
- 8 3. Young vibrant family-oriented community ...Airdrie is one of the fastest growing communities, especially for young families, and they are interested in and actively supporting local business, more so than some of the smaller cities surrounding Calgary
- 8 4. Ample space for development growth ...available Land and Agricultural opportunities ...There are still many, many business categories we are missing in Airdrie (opportunity!)
- 8 5. Strong economy in / around Airdrie ... self sufficient & shielded -- entrepreneurial
- 7 6. Very engaged business community ...strong marketing efforts by econ dev ..an amazing magazine (that sells city) ..Amazing chamber of commerce
- 7 7. Strong venture like attitude towards building businesses and providing services
- 6 8. Safe feeling in community... low crime rate
- 4 9. A consultative approach to policy creation from CouncilCity of Airdrie regularly surveys residents to find out what they want
- 3 10. Perception of small town feeling
- 2 11. natural resource availability (ample land, water etc)
- 2 12. Clean air... low pollution
- 2 13. Excellent City services - high satisfaction rating
- 1 14. strong workforce ...A community of highly skilled individuals
- 1 15. Building partnership with local native communities
- 1 16. Smaller classroom sizes and higher quality education attract young families
- 0 18. Bow River
- 0 19. Involvement in the community ..Volunteers still live in Airdrie and surrounding community
- 0 20. many services available but some majors missing

1.4 – EDOs

Voting Results

Multiple Selection (maximum choices = 6) (Allow bypass)

Number of ballot items: 22

Total number of voters (N): 14

Total

- 7 1. Entrepreneurial environment - attitude of business ...Passionate and determined entrepreneurs - a "get 'er done attitude" ..large base of small business start up
- 7 2. Location of the region ... Proximity to Calgary re: market, international airport ...Proximity to major transportation (international airport, hwy, rail) ..access to markets ..access to markets
- 7 3. Investment pool and access to capital resources
- 6 4. available and affordable industrial land
- 6 5. diverse sectors independent of oil and gas ...diversity of opportunities in different regions - attract international attention
- 6 6. Environment - green building products (clean air, water etc.)
- 6 7. strong technology community
- 5 8. Political will to work together as a region ...political willingness to collaborate - municipal and provincial
- 5 9. Tourism - e.g. opptys for day trip tourism, free parking ..unique downtown cores with boutiques and specialty stores
- 4 10. oil & gas - energy ..oil sands and conventional oil/gas
- 3 11. active and aggressive workforce ...highly educated workforce ..strong (rural) work ethic
- 3 12. Lifestyle - modern, hip, rural communities (not the old gang)
- 3 13. Educational linkages & partnerships
- 3 14. Health & wellness sector
- 2 15. Mountain topography (and the cowboy culture that goes with it... yee haa)
- 2 16. Weather - sunshine, temperate, chinooks
- 1 17. diversity of geography and potential (i.e. east-west) ... lots of variety across region -> appeal to different sectors
- 0 19. Creative economy present (arts, culture, etc)
- 0 20. favourable home based business policy
- 0 21. dialogue within the community and engaged population supportive of new initiatives
- 0 22. Medical facilities

Note: prior to voting, the group brainstormed ideas and then merged the similar items. Below in non-bold are the merged items. These items are ordered as they were originally brainstormed (i.e. not as they were ranked by the group). Items that did not have any ideas merged are not included.

2. active and aggressive workforce ...highly educated workforce ..strong (rural) work ethic / talented people / highly educated workforce

3. Entrepreneurial environment - attitude of business ...Passionate and determined entrepreneurs - a "get 'er done attitude" ..large base of small business start up youthful, entrepreneurial, innovative workforce

Highly educated workforce

**4. Location of the region ... Proximity to Calgary re: market, international airport
...Proximity to major transportation (international airport, hwy, rail) ..access to markets
..access to markets**

location - Calgary
Location of the region
convenient access to major transportation routes/corridors
Transportation Corridors
accessible transportation corridors

**5. Political will to work together as a region ...political willingness to collaborate -
municipal and provincial**

Collaborative Approach
strong REDA that works well together\

6. Investment pool and access to capital resources

access to capital

**10. Tourism - e.g. opptys for day trip tourism, free parking ..unique downtown cores with
boutiques and specialty stores**

Tourism product development opportunities

□

2.0 - Tools

2.1 - Cochrane

What tools do we currently have? What do we need to stimulate economic development?
 Note: these are not prioritized

We currently have:

1. Private capital/investment
2. Have - involved and vocal residents who are interested in progress
3. Entrepreneurs holding regular brain storming sessions
4. University of calgary/mt. Royal college/sait/bow valley college
5. Calgary regional partnership
6. Alberta land use framework - guidelines for how land can be used and types of development

We need:

1. NEED: political/social will to implement green initiatives / dito to #2
2. Need feasibility research - green initiatives
3. NEED: financial incentive - for example private monies raised to build a large wind turbine(s), profit share ideology //NEED: Incentives for the implementation of alternative energy sources into the power grid at the local/grass roots level (e.g. Incentives for installing solar panels in homes, schools, businesses and recreational facilities).
4. NEED: Provincial and Federal support of green energy initiatives //government incentives to promote alternative energy and food sources
5. NEED: Governmental subsidies
6. Need - access to provincial/federal funds to ensure that infrastructure keeps pace with growth (i.e. 4 lanes on hwy 1A & 22) // need - infrastructure to support growth
7. We need municipalities to promote innovation in industry, business, green etc.
8. We need assistance from the municipalities (planning, coordination)
9. NEED: Innovative technologies
10. Need - land in proximity to town available for town to annex/purchase that can be developed for commercial and residential uses
11. We have ASP plans and municipal growth management studies to guide us
12. NEED: protection of natural areas for tourism observation
13. NEED: we as the industry need more support by the government ,e.g. training for employment to maintain new and green construction.
14. NEED: Municipal laws and bylaws that support new initiatives in alternative modes of transportation vocs, e.g. Smaller motorized or electrical or alternative powered vehicles, which produce lower emissions
15. NEED: Less regulations and more global initiatives

□

3.0 – Opportunities to stimulate economic development

Note: the groups brainstormed ideas, then merged the similar items and finally prioritized the best ideas based upon the following criteria:

- High impact (on future econ growth and investment in the Calgary region)
- Feasibility (given resource constraints)

3.1 – Cochrane & area

How can the Calgary Region best capitalize on the growth and investment that is likely to occur in the City of Calgary over the next 5-10 years?

Voting Results

Multiple Selection (maximum choices = 6) (Allow bypass)

Number of ballot items: 19

Total number of voters (N): 12

Total

- | | |
|-----------|--|
| 10 | 1. Infrastructure needs to keep pace, or precede, development //Coordinated planning whether it be land use or development of services such as water sewer //we need a more sustainable lifestyle ,so to manage our resources |
| 7 | 2. attract new businesses and companies to the area to create employment // Locate service and subsidiary industries in Cochrane based on lower input costs //Become a hub for certain industries that may wish to have a 'campus' type of environment, i.e. high tech |
| 6 | 3. Develop more local food production in a number of types of foods - e.g. produce, fresh fruits and vegetables, ideally year around through the development of greenhouses, hydroponics, solar and geothermal heating and use of greywater. ...local farm industry |
| 6 | 4. Develop and implement an effective Public Transportation System that not only links each of the outlying Calgary Regional areas, and that also works well within each of our individual communities, to facilitate the movement of residents and visitors in and out of the Calgary core to all of the businesses and tourist attractions in the entire region. |
| 5 | 5. Create green energy for the Calgary //local green energy generation e.g. wind farm |
| 5 | 6. promote green living (e.g. bigger companies in region can be leaders in promoting energy efficiencies, green houses etc.) |
| 4 | 7. Health care services. Growing towns such as ours need to have planning in place that incorporates some of the benefits the city has that we don't currently have such as a hospital |
| 3 | 8. affordable housing |
| 3 | 9. better housing products with more green space |
| 3 | 10. reduction of political friction that exists between municipalities |
| 2 | 11. Promote tourism out to our individual communities through combined advertising initiatives. ...One example is a magazine/brochure that is distributed through display racks at the Calgary Airport to all visitors. |

- 2 12. become a residential location of choice based on the "small town" and "western heritage" appeal of the community //Communities like ours will expand naturally as the city gets busier and more people look to move away from city life and all the issues that go with it
- 2 13. Savings/Use of water. how many houses can we sprawl with the water that our area can produce?
- 2 14. create nodal development (logical nodes of development so that people have all the benefits, jobs, amenities, live/work/play in a local community w/o going to Calgary)
- 1 15. more apartments less sprawl - higher density ...building up, not out
- 1 16. training and educational opportunities (e.g. satellite campus etc. etc)
- 1 17. sharing of information/data - for example GIS data (e.g. mapping location services, utilities, emerg services, real estate etc)
- 1 18. promote arts and culture in area - create employment, attract visitors/tourists

Note: prior to voting, the group brainstormed ideas and then merged the similar items. Below in non-bold are the merged items. These items are ordered as they were originally brainstormed (i.e. not as they were ranked by the group). Items that did not have any ideas merged are not included.

2. Create green energy for the Calgary //local green energy generation e.g. wind farm
local green energy generation

8. attract new businesses and companies to the area to create employment // Locate service and subsidiary industries in Cochrane based on lower input costs //Become a hub for certain industries that may wish to have a 'campus' type of environment, i.e. high tech

utilize local industry to support growth

12. Develop and implement an effective Public Transportation System that not only links each of the outlying Calgary Regional areas, and that also works well within each of our individual communities, to facilitate the movement of residents and visitors in and out of the Calgary core to all of the businesses and tourist attractions in the entire region.

better transportation to Calgary

affordable transit system to surrounding communities

3.2 – Okotoks & area

What opportunities are there to stimulate new economic growth, investment and interest in the region?

Voting Results

Multiple Selection (maximum choices = 7) (Allow bypass)

Number of ballot items: 23

Total number of voters (N): 23

Total

- 18 1. Tourism Attractions/Infrastructure e.g. Ecotourism ...Eco Park ..zoo ...Further development of the tourism industry (e.g. packaging, coordinated promotions, etc.)
..Have lots of sunshine hours ..Hotel/resorts./destination location ...Historical Sites and Background ...Promotion and participation ranch history
- 16 2. Diversification in the energy industry (e.g. green energy sources) wind, solar
- 16 3. Development Regional Industry Corridor // Joint venture partnerships within differing economic sectors (e.g. different types of businesses & govt agencies working together)
- 15 4. Manufacturing (we have power, resources, to make this happen) ...International food Processing ...Mills
- 12 5. Environmental Products/Services (manuf green products to consulting services) ..Bio (energy, ag. value add) ...Giant methane collector for all our cows
- 11 6. Regional Transportation ...transportation links to all areas of region ...Commuter train
- 9 7. Sports events and facilities - attracting local and tourism ... festivals ...opera house
- 9 8. Increased cooperation and coordination among municipalities in the region
- 7 9. Promoting QofL and lifestyle: country and city living together ...Living and working in the same community ..Cost of Living
- 7 10. Government grants ...tax incentives ...new business start up incentives
- 7 11. Educational Opportunities ...Build with a University or a College directly in the Foothills ...Art college
- 6 12. Indoor Farming/Greenhouses - Fresh Local Produce
- 6 13. Green community development
- 6 14. Promote the region with its assets - economy
- 6 15. ICT (geomatics, eHealth, wireless)
- 4 16. solve the growing global perception of "dirty oil" through marketing and technology
- 4 17. Movie industry
- 1 19. Third Places (work style) capital of the world... non traditional places.. decentralize work
- 0 20. World's largest gas burn stack (Go Flames!)
- 0 21. Outlet Malls
- 0 22. Make a large lake
- 0 23. Take over Walmart - make it AlbertaMart

Note: prior to voting, the group brainstormed ideas and then merged the similar items. Below in non-bold are the merged items. These items are ordered as they were originally brainstormed (i.e. not as they were ranked by the group). Items that did not have any ideas merged are not included.

5. Diversification in the energy industry (e.g. green energy sources) wind, solar

Green Energy
Wind power for sale
Solar development

6. Environmental Products/Services (manuf green products to consulting services) ..Bio (energy, ag. value add) ...Giant methane collector for all our cows

Ecofuel refining

10. Regional Transportation ...transportation links to all areas of region ...Commuter train

transportation links to all areas of region
Improved transportation
Commuter train

11. Development Regional Industry Corridor // Joint venture partnerships within differing economic sectors (e.g. different types of businesses & govt agencies working together)

Promotional Partnerships

3.3 – Airdrie & area

Voting Results

Multiple Selection (maximum choices = 7) (Allow bypass)

Number of ballot items: 26

Total number of voters (N): 13

Total

- 10 1. Events, festivals, convention facility
 - More arts and cultural events - keep the entertainment dollar here
 - attracting major events
 - Venues for large events - conventions, trade fairs
 - A new convention/meeting facility - the ratty T&C simply doesn't cut it - events held there start off on the wrong foot because it is so shabby looking.
 - Support the events already here - Airdrie Pro Rodeo, Airdrie Festival of Lights, Home & Garden Fair
- 9 2. Better public transportation system for workers rapid transit to/from Calgary ...Better roads and highways - better access within Airdrie itself
- 7 3. Fostering entrepreneurial attitude ... Support & assist Home based businesses
 - ... Make it easier for entrepreneurs to find one single place to go to take a start your own business course locally that will cover a variety of topics - lunch box sessions are great, but not comprehensive and timely enough for the excited entrepreneur. Currently they go to Calgary to MRC or Chinook College for this kind of learning - it's not locally minded
- 6 4. Outward marketing of the opportunities that may be found (i.e. Airdrie is not a hick town!)
- 6 5. Definitely promote success stories - maybe an ad campaign featuring prominent or award winning local business owners - use them to inspire and challenge others -> international recognition
- 6 6. create promotional strategies to promote local shopping //Encourage cross marketing opportunity - some of us have established partnerships with like minded businesses, but most Airdrie business owners don't get involved with supporting others in order to help themselves too
- 5 7. Tourism (build on our history, heritage and native attractions... sport & event tourism)
- 5 8. Greater coordination between the various communities for economic development
- 4 9. work in consort with the agricultural community ...opportunities for strong agricultural industries for world markets
- 4 10. Develop a stronger visual identity for Airdrie in terms of storefronts, shopping strolls, etc.
 - let's encourage people to window shop and stroll with their kids from a park to an ice cream shop - get them out of their cars
- 4 11. Housing opportunities as a result of proximity to large industrial areas ..diversified housing ...Balzac Development ...New community designs/visions to appeal to out of City living
- 4 12. Diversified commercial/industrial market -> to ensure good mix in economy
- 3 13. Piggyback on the Balzac development - once Calgarians start shopping there, Airdrie will be moments away - they'll suddenly feel like Airdrie isn't really that far anymore.
- 3 14. communities working together for common good of the region
- 2 15. construction industry growth (commercial and residential)
- 2 16. available land opportunities

- 2 17. job opportunities ...more high skilled labour opportunities
- 2 18. When companies come here, getting them engaged in the community
- 2 19. Growth of Calgary airport
- 2 20. continued growing populations
- 1 21. low development charges and levies
- 1 22. New hotels - 15 minutes from Calgary International Airport
- 1 23. stable provincial and country (political and economical) ...world markets crashing so opportunities for CRP economy
- 0 25. small community feel for new home owners ..Airdrie is known - it is large enough for recognition and consideration for relocation but small enough not to be 'big city'
- 0 26. gaming facilities

Note: prior to voting, the group brainstormed ideas and then merged the similar items. Below in non-bold are the merged items. These items are ordered as they were originally brainstormed (i.e. not as they were ranked by the group). Items that did not have any ideas merged are not included.

- 2. Better public transportation system for workers rapid transit to/from Calgary**
- ...Better roads and highways - better access within Airdrie itself**
 - rapid transit to/from Calgary
 - transportation connections
 - Improved / Added Infrastructure (transportation)

3.4 – EDOs

Voting Results

Multiple Selection (maximum choices = 7) (Allow bypass)

Number of ballot items: 23

Total number of voters (N): 12

Total

- 8 1. Telework - distributed work centres ..technological advances and opportunities for remote workforce collaboration
- 7 2. Renewable, Alternative energy and carbon sequestration
- 7 3. Building Products (wood and non wood)
- 6 4. Eco industrial parks (e.g. Hinton) ..Environmental product companies,
- 6 5. agri-value (grow local food product awareness, cluster development around food processing/growing/shipping) ..Food Processing- Cargill and various spin offs ..Ethnic food production (herbs, spices, Halaal meats, lentils, ancient grains)
- 6 6. Transportation & Warehousing Logistics ..Opportunities that will develop as a result of Asia Pacific Gateway strategy
- 5 7. Professional & Technical Services (eng'g, etc.)
- 5 8. corridor development (e.g. industrial)
- 4 9. tourism development (e.g. product development & destination marketing) ...ag tourism
- 4 10. Spin off industries (r&d, telegenetics, etc) ..second tier resource usage (ex bio fuels)
- 4 11. refining primary products into value-added products in the Region/AB/Canada
- 4 12. Incentives to facilitate bio-enterprise (to encourage following green business model)
- 3 13. Fibre Optic connectivity for all communities - rural areas
- 3 14. Water use and reuse (super water conservation)
- 3 15. regional transportation networks (communities working together to enhance transpo systems)
- 2 16. Sub-regional development projects- with various communities (e.g. RISE, etc)
- 2 17. reasonable cost of doing business in region
- 2 18. stable political will to support business (national & international)
- 1 19. educated workforce ..Assured labour force when economy recovers
- 1 20. Regional home based business policies- across CRP consistency needed
- 1 21. manufacturing industry catering to mountain / outdoors / adventure lifestyle (i.e. snowboards, mountain bikes, etc.)
- 0 23. regionally / locally focused health and wellness - products or services particular to the region

Note: prior to voting, the group brainstormed ideas and then merged the similar items. Below in non-bold are the merged items. These items are ordered as they were originally brainstormed (i.e. not as they were ranked by the group). Items that did not have any ideas merged are not included.

- 2. tourism development (e.g. product development & destination marketing) ...ag tourism**
 Tourism Product Development- Land, themes, build on arts and culture
 Tourism destination awareness marketing across region
 Ag-tourism assets that we can build on

4. Renewable, Alternative energy and carbon sequestration

Renewable energy
alternative energy
green tech

10. Transportation & Warehousing Logistics ..Opportunities that will develop as a result of Asia Pacific Gateway strategy

transportation & logistics

3.5 – Executive

In terms of economic development... What are the priorities for the Calgary Region in the next 5-10 years?

Voting Results

Multiple Selection (maximum choices = 5) (Allow bypass)

Number of ballot items: 14

Total number of voters (N): 18

Total

- 12 1. Green/Clean Industry Development -- Incineration and power production
- 12 2. Diversification of industry types (e.g. emerging optys...specialized and enhanced agr. production) ...Ensure that economic diversity and expansion occurs in the region and not just the city ... Focus on creative and knowledge based industry, R&D...Film Industry)
- 11 3. Infrastructure Development Transportation/Regional Servicing Expansion ...
Transportation and logistics for the Can/Mex corridor
- 11 4. infrastructure (physical) .. water, roads, sewer
- 10 5. rural and urban community cooperation as to viability of the future business - ensure that we are working together on new opportunities
- 9 6. social infrastructure (for workers) - health care, schools, housing etc ..pedestrian oriented development to strengthen existing local and regional economics ...Safe communities ..specialized transportation - accessibility, seniors ...
- 8 7. regional marketing plan ...Promote entire region
- 5 8. Accessing capital within the region (for investment)
- 3 9. Taxes personal , business and property based -- a tax incentive to this new small business to survive in this disastrous economical times
- 3 10. Encourage local work force through training ...Immigration ...attracting new workers
- 2 11. a need for large tracks of serviced land
- 2 12. Recognizing existing activities to avoid conflict i.e. gravel extraction, intensive livestock, forestry, oil and gas extraction
- 1 13. stability of existing job offerings - retention

Note: prior to voting, the group brainstormed ideas and then merged the similar items. Below in non-bold are the merged items. These items are ordered as they were originally brainstormed (i.e. not as they were ranked by the group). Items that did not have any ideas merged are not included.

2. regional marketing plan ...Promote entire region

effective promotion of the regions smaller attractions

Effective promotion for recreation opportunities

Transportation and logistics for the Can/Mex corridor

Encourage economic development which leverages upon transit

4. Green/Clean Industry Development -- Incineration and power production

Wherever possible develop using a green philosophy

6. Diversification of industry types (e.g. emerging opptys...specialized and enhanced agr. production) ...Ensure that economic diversity and expansion occurs in the region and not just the city ... Focus on creative and knowledge based industry, R&D...Film Industry)

Focus on specialized industry devel - e.g. aero space

8. infrastructure (physical) .. water, roads, sewer

Sustainable water/ waste water handling and supply

12. Recognizing existing activities to avoid conflict i.e. gravel extraction, intensive livestock, forestry, oil and gas extraction

Synergies between business types

13. social infrastructure (for workers) - health care, schools, housing etc ..pedestrian oriented development to strengthen existing local and regional economics ...Safe communities ..specialized transportation - accessibility, seniors ...

Affordable Housing

Bill McAlpine golf Course and Country Club

4.0 – Action plans

4.1 – Cochrane & area

What key initiatives or opportunities should be reflected in the REGIONAL strategy in order to ensure sustainable economic growth? Implementation, Projects, Activities, etc.

Voting Results

Multiple Selection (maximum choices = 5) (Allow bypass)

Number of ballot items: 16

Total number of voters (N): 11

Total

- | | |
|----------|--|
| 9 | 1. co-ordinate infrastructure development //making sure local municipalities work together to look at the 'bigger picture' of what needs to be done regarding infrastructure and development //support for current local industry and business with coordinated future development where viability is not jeopardized by regulations and red tape |
| 8 | 2. Calgary Region advertising and marketing approach that encompasses the outlying communities that make up the CRP. //market region to businesses by promoting benefits of location
- Interactive web site presence that is educational in nature, explaining the benefits of living and conducting business, as well as visiting our region (tourism, art, recreational and cultural) |
| 6 | 3. Affordable living/housing |
| 5 | 4. Wind/Solar power initiatives ...since the opportunity of assessing monies that are not apart of running budgets , we should launch these green action e.g. water harvesting wind geo etc... |
| 4 | 5. Create an effective network of transportation corridors throughout the entire region that supports multi-modal transportation. |
| 4 | 6. help businesses start/succeed in CochraneNo/reduced business taxes in Cochrane |
| 4 | 7. incorporate surrounding natural areas in conservation effort |
| 3 | 8. Allow water conservation - Gray water reuse |
| 3 | 9. Coordination of regulations (i.e. bylaws, business licensing) make the playing field more even throughout the region |
| 2 | 10. ensure that there is grassroots (resident, businesses) representation on CRP, not just government |
| 2 | 11. Provide live, work and play in the close proximity |
| 2 | 12. Mandate certain goals within a specific time-frame - for example to set our town a goal that by 2015, fifty per cent of our electricity supply will be harvested through the combined output produced by local wind farms. |
| 1 | 13. Extend partnerships through the region reduce the competitiveness between different municipalities, so that a win for the region is a win for all municipalities |
| 0 | 15. Offer compensation program (for landowners who can't get value in growth corridor) |
| 0 | 16. Municipalities promoting innovations |

4.2 – Okotoks & area

Note: the group did not prioritize these

1. OPPORTUNITY: Tourism Attractions/Infrastructure e.g. Ecotourism ...Eco Park ..zoo ...Further development of the tourism industry (e.g. packaging, coordinated promotions, etc.) ..Have lots of sunshine hours ..Hotel/resorts./destination location ...Historical Sites and Background ...Promotion and participation ranch history

2. Business working together in joint advertising campaigns to bring awareness to communities, festivals etc. With support and funding from Travel Alberta.
3. Newsletter / Newspaper insert promoting area
4. Two Markets: 1) Action Heroes (things to do outside Calgary), and 2) Geriatrics R Us (Balcony Muppets) - more sedentary activity/attractions
5. get different tourist type companies working together on "package" offers and market as an "all inclusive" vacations
6. lower airport fees docking fees
7. take all the biggest of everything from around Alberta (egg - Vegreville, duck - Andrew, perogy - Glendon) and create a giant motley park (like the Russians have with their old Lenin statues)
8. Create theme designed tourism paths and destinations with area attractions, festivals, celebrations to be shared
9. gambling mecca
10. Sense of space (big sky, big everything) is the biggest asset - build activities/tours around the asset
11. Day-tripper tourism market (Calgarians to immediately surrounding areas)
12. Make green ethic (energy/products/services) a tourism market (tours, demonstration and prototype leader, rural eco lodges/experiences)
13. Product and service packaging and promotions
14. Gateway to the Rockies (sleep, eat buy in area) Play in the Mountains
15. Market existing product to the "right" target market
16. domed stadium

OPPORTUNITY: Diversification in the energy industry (e.g. green energy sources) wind, solar

2. Get studies of ideal places for wind power and get partnership with towns & government (promote towns to invest to obtain their own energy source)
3. All alternative energies have competitive possibility here - wind, solar, bio. Requires provincial strategy, and support from oil industry (PR, "energy" rather than just oil and gas operational model. Capitalize on Obama movement (\$63 billion in Stimulus Plan for green energy)
4. Home energy consumption monitoring - UBQT
5. Smart Grid, Smart Meters, ability to generate and sell power back to the grid
6. PPP
7. Methane Generators
8. Alcohol Burning Generators

9. Environmental education programs (to all members of the population)
10. More bio-fuels manufacturers
11. municipal tax breaks for green initiatives
12. Royalty breaks for oil companies that develop alternative energy strategies
13. Water is an offshoot of the energy resource. We have a water challenge looming in Alberta. Alberta can lead in water management, water use/consumption technology/products, and water-related business services (consulting)
14. Not just Built Green, but new Built Alberta standard for high efficiency homes, commercial buildings

OPPORTUNITY: Development Regional Industry Corridor // Joint venture partnerships within differing economic sectors (e.g. different types of businesses & govt agencies working together)

2. Turn raw materials from Alberta into useable goods
3. areas to put the manufacturing /businesses in proximity to major transportation corridors

OPPORTUNITY: Manufacturing (we have power, resources, to make this happen) ...International food Processing ...Mills

2. Government funded employee training incentives/attraction package
3. High Fashion Items-Clothing,purses, Shoes
4. Freeze Dried Meat Products
5. Canola Oil Processing Plant
6. Recycled Plastic Products
7. Clean waste fertilizer packaged products
8. Leather products
9. Manufacture of Wind power parts
10. Solar Collector construction
11. promote the Town/Country benefits to potential manufacturing companies allied to the "lifestyle" in Alberta
12. Package and promote local products, i.e. local food growers, ranchers, timber frame homes, specialty products e.g. Honey - meade wine, Kirche meats, local specialties
13. Tax incentives for existing manufacturers to branch into new areas of manufacturing or to expand existing plants

OPPORTUNITY: Environmental Products/Services (manuf green products to consulting services) ..Bio (energy, ag. value add) ...Giant methane collector for all our cows

2. Create no idle zones in all regions
3. Reduce consumption of plastics - bags, packaging. Bring in reusable bags
4. Get rid of drive throughs in all facets of consumerism
5. Harness the sunshine by establishing indoor greenhouses - revolutionize back to basic lifestyle by combining new eco technology
6. Incentives to businesses developing environmental products, technologies and services and R&D
7. Free land lease for manufacturers.
8. Harness the power of supply and demand - stop using harmful products and services and they will stop supplying them.....creating the shift towards an eco friendly environment
9. Tax breaks for green initiatives which reduces carbon footprint or provide unique product offering
10. Consulting specialty - water, wastewater, remediation

11. Recycled products
12. Home energy consumption management solutions
13. Green infrastructure innovation
14. Green Institute at U of C - Research Chair(s), very significant budget to build a global presence quickly (like University of Waterloo has related to Computer Science), and a new IP policy where invention stays with inventor (like University of Waterloo) to fast track spin-offs (Alberta policy has universities own IP - invention never gets off the workbench). Attract a Research Chair in the area like a Stephen Hawking is to Physics (e.g. David Suzuki)
15. Green building products
16. Green alternative energy components manufacturing (solar panels, wind turbines, bio technologies). Will require some incentives (e.g. Germany enticed Canadian company to establish world's largest solar panel manufacturing plant)
17. Water management technology innovation
18. ICT solutions (applications/technologies) that support green push

OPPORTUNITY: Sports events and facilities - attracting local and tourism ... festivals ...opera house

2. school marching band competitions. Hosting international cultural & sporting events.
3. adopt a publicly posted Calendar of Events to bring more attention to the large array of hosted events
4. entire region working together to actively solicit and host sporting events i.e. summer games
5. Promote each towns Canada Day, Christmas Parades and Country Fairs
6. expansion and development of facilities/locations for cultural events i.e. "Shakespeare in the Park"

OPPORTUNITY: Increased cooperation and coordination among municipalities in the region

2. regular meetings among EDO's
3. super boards like the gta (greater toronto area)
4. municipalities pool money together that will benefit all e.g. Recreation Centre/Soccer
5. economy of scales when marketing the entire region
6. regional business licenses (e.g. Alberta Southwest Regional Alliance)
7. Quarterly meetings with Economic boards with representation from all areas of government

4.3 – Airdrie & area

Voting Results

Multiple Selection (maximum choices = 10) (Allow bypass)

Number of ballot items: 70

Total number of voters (N): 12

Total

- 5 1. TOUR: one brochure identifying the uniqueness of the area // Collaborate on an information piece that brings together the o/s attractions in the region
- 5 2. TOUR: Improve cooperation with Tourism Calgary (don't reinvent wheel)
- 5 3. SHOP: educate and encourage local businesses to advertise and develop their own promotions and co-operative promotions
- 5 4. MARKET: use the web intelligently

- 5 5. TRANS: Provide daily transportation to major centres to and from Calgary (e.g. Chestermere, Cochrane, Airdrie, Crossfield)
- 5 6. TRANS: Affordable regional travel combining LRT and bus, similar to GO Transit with sustainable relationship with local transit ...Any link to Calgary (LRT, Bus, etc.)
- 4 7. OPPORTUNITY: Better public transportation system for workers rapid transit to/from Calgary ...Better roads and highways - better access within Airdrie itself
- 4 8. TOUR: Build a new convention facilities - they will appeal to the business community as well as to event promoters // develop a sales pitch to build a convention facility and attract a major sponsor //Build A new convention/meeting facility - the ratty T&C simply doesn't cut it - events held there start off on the wrong foot
- 4 9. SBus: publish success stories //Encourage local media to advertise success stories through regular good business stories pages or sections
- 4 10. TOUR: Support the events already here - Airdrie Pro Rodeo, Airdrie Festival of Lights, Home & Garden Fair
- 4 11. AG: Work with agriculture to supply products to local/regional businesses using their products (e.g. beef, poultry, vegetables, eggs, etc.)
- 3 12. AG: Let's get a real farmer's market - one that has product for more than two weeks. An indoor farmer's market could have stalls rented to local artisans - Bearspaw has a very popular and well attended farmer's market all summer, ours is terrible
- 3 13. TOUR: provide professional guidance to communities for event marketing
- 3 14. TRANS: Encourage employers to use buses/vans to bring employees out to the region
- 3 15. AG: Regional mandate for future development
- 3 16. SHOP: promote local commodities/services over international or out of region // Market the benefits of "shopping" locally. How does it benefit the every day person?
- 3 17. TRANS: Region wide planning not municipal "tunnel vision"
- 3 18. SBus: one stop shop for all small business information (e.g.: Bizpal) or better promote these opportunities
- 3 19. MARKET: advertise internationally rather than just to Calgary, growing world population looking for new place to live & work
- 3 20. MARKET: region work closer with province to do international and national markets (doesn't seem coordinated)
- 2 21. SBus: Identify industry sectors that don't need to be in big urban centre but rather are conducive to set up in Airdrie or another regional community
- 2 22. MARKET: Do marketing to promote regional opportunities - similar to Airdrie's book that promotes Airdrie - but regional promotion
- 2 23. TRANS: Promote car pooling... need space for parking... dedicated lane on highway ..Educate people on benefits of car pooling... environmental benefit
- 2 24. SBus: regional finance and marketing support
- 2 25. SBus: Telework opportunities. support any initiatives that allow people to work from their homes
- 2 26. SBus: Mentoring program // create a mentoring program for small business
- 2 27. OPPORTUNITY: work in consort with the agricultural community ...opportunities for strong agricultural industries for world markets
- 2 28. TOUR: develop relationship with local native reserves
- 2 29. TOUR: Work with concert promoters to get large scale outdoor or indoor events in the towns - musical events that appeal to the younger generation
- 2 30. TOUR: educate local businesses on the econ impact of events and why they should support them as sponsors
- 2 31. SBus: Develop an "ask the experts" volunteer program for business owners to access the variety of expertise found in Airdrie - marketing, finance, etc.
- 1 32. SBus: Determine landscape and partnership/consolidation opportunities.

- 1 33. SBus: Make it easier for entrepreneurs to find one single place to go to take a start your own business course locally that will cover a variety of topics - lunch box sessions are great, but not comprehensive and timely enough for the excited entrepreneur. Currently they go to Calgary to MRC or Chinook College for this kind of learning - it's not locally minded
- 1 34. OPPORTUNITY: Outward marketing of the opportunities that may be found (i.e. Airdrie is not a hick town!) //Definitely promote success stories - maybe an ad campaign featuring prominent or award winning local business owners - use them to inspire and challenge others -> international recognition
- 1 35. AG: co-operative investment in grain production and marketing, for higher yields and shared opportunity by pooling resources, shares in land and in crop production or assistance. (world demand about to rise very sharply)
- 1 36. AG: encourage dialogue with likeminded communities in other parts of the world
- 1 37. AG: long term land use, development and infrastructure planning/vision
- 1 38. SHOP: Create city wide campaigns, events, promotions. Midnight Madness is very popular, and the local papers run ad supplements, but the individual stores participating rarely help each other by reminding shoppers what other stores are open, etc. Get events happening, and promote ideas to business owners of how they can cooperate.
- 1 39. SHOP: Make parking in downtown easier - bring in unique shops (ice cream parlor, etc).
- 1 40. TOUR: Develop events that are held in the daytime in the summer - the FoL is great, but visitors don't stay to shop because it's late in the evening, and friggin' cold!
- 1 41. OPPORTUNITY: create promotional strategies to promote local shopping //Encourage cross marketing opportunity - some of us have established partnerships with like minded businesses, but most Airdrie business owners don't get involved with supporting others in order to help themselves too
- 1 42. MARKET: financial incentive plans to move here (matching money on investments at lower rate)
- 1 43. AG: Local greenhouses - needed for winter - to grow produce and keep dollars in area
- 1 44. TOUR: create a sponsorship centre similar to volunteer airdrie where businesses can go to invest their \$\$ in events as a one stop shopping - all events/clubs etc put up their needs/requests
- 1 45. SBus: Create a method of advertising career opportunities for professionals in the region. So they don't go elsewhere for work. Not a very good system currently.
- 1 46. SBus: set up accounting/ financing system for multiple small businesses to work together for shares in housing and business construction, work together rather than separately on ventures
- 1 47. SBus: Promote and encourage development of Airdrie Group mentioned by Lorna and Ken for local education for small business or entrepreneurs
- 1 48. TRANS: Residents of bedroom communities can get to Calgary on commuter buses, but Calgary employees cannot go the opposite way to work in the bedroom communities. It's not necessarily about saving gas/time, but lower income workers may not have access to vehicles at all.
- 1 49. TRANS: Commuter bus to higher education so students can still live in Airdrie (lets try it again)
- 1 50. TRANS: Mustn't forget about persons with disabilities
- 1 51. TRANS: construct better access between Airdries 3 areas and promote cross-community involvement
- 0 52. SBus: A large portion of the chamber membership is the 1-2 businesses so there is a huge opportunity for the Chamber to include & support the HBB community. The chamber should have programs that appeal to all their members. As the

business community grows so does the responsibility of the chamber.
Surrounding chambers should support each other as well.

- 0 53. SBus: Identify key business leaders and provide them with the tools they need to direct potential entrepreneurs in the right direction - give them "So you Wanna be an Entrepreneur" brochures they can hand out, let them be your salespeople
- 0 54. TOUR: create sponsorship opportunities that cross 2-3 events
- 0 55. MARKET: extended distribution of AirdrieLIFE
- 0 56. TOUR: New event venues must have qualified event planner on staff that can be easily reached (not just "leave a message" phone number)
- 0 57. MARKET: The Calgary Herald has a regular supplement on the local towns/cities that had features on business owners, recreational opportunities - these were great, how can we leverage them? Possibly wider distribution? Explore similar opportunities online, with the Calgary Sun, FFWD magazine, Metro and 24
- 0 58. TRANS: begin coordinated dialogue towards exploring this.
- 0 59. SHOP: Identify and communicate a consistent brand
- 0 60. SBus: Coordinate the development and disbursement of small business related resources.
- 0 61. OPPORTUNITY: Small business. Fostering entrepreneurial attitude ... Support & assist Home based businesses
- 0 62. SHOP: Start an Airdrie Bucks campaign - When shopping locally - collect Airdrie Bucks that can be spent within Airdrie during a special redemption time
- 0 63. SHOP: advertising 101 most small businesses have no clue how to budget and create marketing strategies that work
- 0 64. TOUR: provide funding/grant education to communities to gain easier access to funds for creating maintain events
- 0 65. AG: Develop marketing for buying locally rather than buying imported produce etc... Why does that benefit us?
- 0 66. AG: A small local farmers market of some kind? Scientific crop research opportunities?
- 0 67. TRANS: Determine how smaller communities might feed into the bedroom community system and then into the larger cities.
- 0 68. TOUR: Help local organizations, like Volunteer Airdrie, ensure that events have enough volunteer help
- 0 69. OPPORTUNITY: Tourism, Arts, culture ... Events, festivals, convention facility
- build on our history, heritage and native attractions
- Venues for large events - conventions, trade fairs
- 0 70. TOUR: International marketing program

4.4 – EDOs

Voting Results

Multiple Selection (maximum choices = 10) (Allow bypass)

Number of ballot items: 64

Total number of voters (N): 13

Total

- 7 1. Developing satellite distributed work centres in region (that complement CED initiatives)
- 7 2. Centre of excellence // Develop a centre of excellence in renew energy (and tie in with university / R&D community)

- 7 3. framework for business to locate in a Eco-park - bylaws, criteria, infrastructure support
- 7 4. Development of post secondary facilities and satellite campus- general arts, engineering, English, etc.- LT Bring post secondary closer to the communities in the region- technology or physical campus
- 6 5. Build on work completed to date on Wood and Non wood business cases
- 5 6. Educate business leaders and local work forces // educating regional business and industry how they can use telework opportunities and how it can benefit their business
- 5 7. Work with existing large industry to determine what products can be manufactured in Alberta. E.g./ Cargill- stop shipping raw ingredients around North American- more Alberta based manufacturing needed
- 4 8. collaborative regional marketing for tourism destinations
- 4 9. Commuter rail, public transit to move people within the region - affordably, sustainably
- 4 10. Land use bylaws to support eco industrial development
- 4 11. Closed system of energy production, energy use, and waste heat utilization (no net loss system)
- 4 12. collaborative/congruent policies (at municipal levels)
- 4 13. Develop regional policies to make it attractive for companies to operate in region - i.e. municipal land use bylaws that allow for residential solar panels, wind energy generators, low flush toilet incentives
- 3 14. identify opportunities/partner for regional transportation initiatives (e.g. bus systems, light rail)
- 3 15. Green inter-modal rail and road (container handling, stuffing)
- 3 16. Develop joint marketing programs, enhance staffing and human resources for industrial corridors- Need planners to complete ASP reviews
- 3 17. product development and packaging - incorporated into regional marketing //product packages for existing tourism assets, especially ag-tourism
- 3 18. Add in stubbing for solar technologies for residential and commercial application- small scale wind turbines
- 3 19. market/promote telework to target audiences // Market telework to commuters that work outside of core CRP communities e.g. Towers in Calgary
- 2 20. Nano-tech insulation applications (wall board, bat insulation, windows)
- 2 21. lifestyle/appeal marketing to HBB/telework professionals
- 2 22. Political support from municipal leaders - may initiate action
- 2 23. consumer opportunities to purchase (muni policy should encourage use of bio-fuel)
- 2 24. Build on the wellness tourism project currently in place in Canmore
- 2 25. Enhanced power grid distribution and power storage capacities
- 2 26. educate producers and consumers about the kinds of "heritage" foods unique to the region, and develop that as sustainable regional production
- 1 27. specialized educational opportunities related to area industry/businesses (e.g. apprenticeship programs) in communities
- 1 28. Identify external market and promote B&B's, experiential tourism including agri-tourism
- 1 29. government incentive - LT (e.g. enviro credits?!) //incentives / credits
- 1 30. Green model (bio diesel)
- 1 31. develop recruitment strategy targeting single and/or stay at home parents / elderly
- 1 32. Business incubator to support start-ups
- 1 33. promote '100 Mile Diet' and lifestyle
- 1 34. networking initiatives amongst producers/businesses, etc. to foster opportunities
- 1 35. encourage development of better storage and transportation to support value-added activity
- 1 36. Value-added friendly land use policies

- 1 37. Incubator, mentoring, R&D opportunities to support innovators
- 1 38. partner educational institutions with industry & secondary education facilities
- 1 39. Introduce other energy sources to power value added ag opportunities
- 1 40. Land identification and consolidation of land owners...green roof, grey water recycling, green development attraction for industrial- Prestige Eco Industrial Parks that limit impact on environment
- 1 41. develop strategy/framework outlining how a specific company/sector's outputs can be used as inputs for another business - maximize dollar savings and minimize waste
- 1 42. Coordinated raw materials transportation and collection
- 1 43. product diversify for existing building product companies - business growth & retention
- 1 44. Lobby as a region for incentives (tax and R&D) and policy guidelines to support use
- 1 45. Specialized professional services in geotechnical, petroleum engineering, etc.
- 1 46. Niche tourism market development (Japanese, seniors, eco, etc.)
- 0 48. foster/promote tourism knowledge development amongst operators (e.g. partnerships - Travel Alberta)
- 0 49. bring in external resources into our communities for rural application
- 0 50. Increase available office space in CRP communities
- 0 51. Community Beautification strategies need to be developed with former Business Improvement areas and zones
- 0 52. Canadian Badlands Ltd. initiative and development strategy
- 0 53. Educate business re marketing - targeting external vs. internal audience (refer to negative connotation of cowboy "wild west" OR positive connotation of "get 'er done")
- 0 58. Hemp products & local hemp farming
- 0 60. Encourage businesses to recycle, conserve water, run more environmentally friendly
- 0 62. incentives for business for development
- 0 64. communication, communication, communication

5.0 – Roles of the CRP

What should be the key ROLE (s) of the CRP???

Note: the groups brainstormed roles and then merged similar items. These were not prioritized .

5.1 - EDOs

1. Research and info sharing

- Sector research and opportunity identification //Distribute information on identified opportunities and trends
- Disseminate leads to member communities for data input/collection in an organized and coherent form

2. Clout. provide political backing to emerging trends and projects ("clout")

- Become more of a lobby organization and engage our elected officials to better support the Economic Development Forum and their initiatives (policy development, funding - funding from Alberta Finance & Enterprise, WD)

3. Grant Collaboration. Multi-community grant acquisitions for projects that impact the Region // Big bags of money from Walter Valentini's office (bi-weekly) ..and pizza

4. Bring together member communities to leverage resources/dollars to coordinate marketing initiatives and sub-sectoral business/investment case development

5. Coordinated mktg & investment attraction

- Coordinated CRP Team approach to investment attraction and trade shows
- Regional presence at big trade shows - internationals
- coordinate activities to attract business and people to the region
- To promote the region for business attraction
- Market the region - draw investment interest to the region

6. Travel with Dave around the world promoting the region.

7. Involve in CED ... organizational development (e.g. expansion/incorporation of CED - roles of partner agencies)

8. Individual municipal autonomy within a regional governance model //equal commitment (staff contribution) and equal decision making power amongst member municipalities

9. Community Engagement. mandatory ?! involvement/engagement of communities

10. Similar to what it is now - bring together EDO's and member municipalities for information sharing, collaborative projects that benefit the region, education/training opportunities for EDOs

11. Increased funding and staff support for the EcDev Forum - i.e. marketing expertise

12. More action!

5.2 – Executive

What are appropriate role (s) for CRP?
--

1. **Facilitating economic development ...To facilitate it being one of the most attractive developed areas / facilitation**
2. **Trend monitoring & development (sectors, workforce ...)**
3. **Education & mentor to the region (awareness & info share x-region so that all communities know what we are doing) // Mentor for our region**
4. **Advocacy: Lobbyist for the regional Economic Development of the Region / regional voice / advocacy to prov for support / our voice to the prov government / Dove tail our plan with the remainder of the province.**
5. **Mutual cooperation and collaboration e.g. clearing house: assisting co-operation within the municipalities / assisting co-operation within the municipalities / coordination**
6. **One stop approach to external awareness. Providing the membership the 'environment' in terms of - policies regarding land use; tax regimes and general support for investment - that would give a 'one stop' atmosphere**
 - a. Conduit of local economic needs to a regional level for promotion (Coordinated external promotion)
 - b. show outsiders the regional big picture, and provide enuf info for people to dig further

□

Appendices

A – Session Overview

Consultations

- Stakeholder interviews
- Focus groups using electronic brainstorming process
- Opportunity for input into the direction of an economic development strategy
- Forum for ideas to make your region more prosperous
- Raise the interest level in more coordination and support for economic development activities

Questions

Community

1. What unique strengths and assets does the region have to attract/sustain economic growth and investment in the future?
2. What opportunities are there to stimulate new economic growth, investment and interest in the region?
3. Implementation. How do we make this happen? Suggest 1-2 specific actions (e.g. projects, tools etc.) for each opportunity?

Executive

1. In terms of economic development (business growth, investment and interest in the region)... What are the priorities for the Calgary Region in the next 5-10 years?
2. What are appropriate role (s) for CRP?

B – Participants (Okotoks)

1. Shane Olson Town of Okotoks Econ Development
2. Monika McLachlan - All Through the House
3. Tessa Nettleton Okotoks Public Library
4. Marg Cox - Town of Okotoks
5. Cheryl Actemichuk - ATB Financial
6. DAVE JACKSON - COUNTRY CHRYSLER
7. Allan & Kimberley Switzer - Ooh La La Catering
8. Zack Straker- Millarville Racing and Agricultural Society
9. Cathy Huth - Okotoks and District Chamber of Commerce President
10. Stacie Symington - Community Futures - Highwood
11. Barry williamson TV Council
12. Maureen Nelson - Turner Valley Citizen Rep
13. roland smith okotoks glass,
14. Teresa Phelan - Blackie Community Association
15. Chris Fields, Rynic Communications
16. Tannis Andrejcin Econ Dev committee
17. Dusty Dancer DeWinton Community Association
18. yves mercier ; simply floors
19. Victoria & Robert A Touch of Italy - Okotoks
20. Mark & Tara - Goldenwest Broadcasting
21. Ryan Sawatzky, Devopments2 Inc.

C – Participants (Airdrie)

1. Shawn Keeper - Mattamy Homes
2. Christopher Harper - Community Links
3. Sarah Deveau, Cater Tot Consignment
4. Maria Elliott, Chair Volunteer Airdrie
5. Sharon Sinclair - Sutton Group Real Estate
6. Glen Walker - Bow Valley Credit Union
7. Lorna Hunt - Airdrie Chamber of Commerce
8. Ann Schuler - Rocky View Adult Education
9. Andy Zimmer Airdrie Employment Services
10. Daniel Stimson - Siksika Employment
11. kent rupert
12. Sherry Shaw-Froggatt Frog Inc Publishing & Marketing
13. Norman Miller - Providence Construction

D – Participants (EDOs)

1. Kent Rupert Airdrie ED
2. Scott CFC West
3. Shane Olson Town of Okotoks
4. Troy Payne - Calgary Regional Partnership
5. Barry Schlinker - DFAIT
6. Joann Churchill, Town of Cochrane
7. Jennifer Brooks - Community Futures Wild Rose
8. Monique LeBlanc Community Futures Highwood
9. 'Super' Dave Kalinchuk, Rocky View
10. Marilyn MacArthur - Manager Economic Development: Town of High River
11. Leona & Sara, Airdrie ED

E – Brainstorm action plans by category (Airdrie)

1. OPPORTUNITY: Tourism, Arts, culture ... Events, festivals, convention facility - build on our history, heritage and native attractions - Venues for large events - conventions, trade fairs

2. TOUR: one brochure identifying the uniqueness of the area // Collaborate on an information piece that brings together the o/s attractions in the region
3. TOUR: Improve cooperation with Tourism Calgary (dont reinvent wheel)
4. TOUR: International marketing program
5. TOUR: Build a new convention facilities - they will appeal to the business community as well as to event promoters // develop a sales pitch to build a convention facility and attract a major sponsor //Build A new convention/meeting facility - the ratty T&C simply doesn't cut it - events held there start off on the wrong foot
6. TOUR: provide professional guidance to communities for event marketing
7. TOUR: Support the events already here - Airdrie Pro Rodeo, Airdrie Festival of Lights, Home & Garden Fair
8. TOUR: develop relationship with local native reserves
9. TOUR: provide funding/grant education to communities to gain easier access to funds for creating maintaining events
10. TOUR: Work with concert promoters to get large scale outdoor or indoor events in the towns - musical events that appeal to the younger generation
11. TOUR: Develop events that are held in the daytime in the summer - the FoL is great, but visitors don't stay to shop because it's late in the evening, and friggin' cold!
12. TOUR: New event venues must have qualified event planner on staff that can be easily reached (not just "leave a message" phone number)
13. TOUR: Help local organizations, like Volunteer Airdrie, ensure that events have enough volunteer help
14. TOUR: create sponsorship opportunities that cross 2-3 events
15. TOUR: educate local businesses on the econ impact of events and why they should support them as sponsors

16. TOUR: create a sponsorship centre similar to volunteer airdrie where businesses can go to invest their \$\$ in events as a one stop shopping - all events/clubs etc put up their needs/requests

OPPORTUNITY: Better public transportation system for workers rapid transit to/from Calgary ...Better roads and highways - better access within Airdrie itself

2. TRANS: Promote car pooling... need space for parking... dedicated lane on highway ..Educate people on benefits of car pooling... environmental benefit
3. TRANS: begin coordinated dialogue towards exploring this.
4. TRANS: Affordable regional travel combining LRT and bus, similar to GO Transit with sustainable relationship with local transit ...Any link to Calgary (LRT, Bus, etc.)
5. TRANS: Residents of bedroom communities can get to Calgary on commuter buses, but Calgary employees cannot go the opposite way to work in the bedroom communities. It's not necessarily about saving gas/time, but lower income workers may not have access to vehicles at all.
6. TRANS: Commuter bus to higher education so students can still live in Airdrie (lets try it again)
7. TRANS: Determine how smaller communities might feed into the bedroom community system and then into the larger cities.
8. TRANS: Musn't forget about persons with disabilities
9. TRANS: Encourage employers to use buses/vans to bring employees out to the region
10. TRANS: Provide daily transportation to major centres to and from Calgary (eg. Chestermere, Cochrane, Airdrie, Crossfield)
11. TRANS: Region wide planning not municipal "tunnel vision"
12. TRANS: construct better access between Airdries 3 areas and promote cross-community involvement

OPPORTUNITY: Small business. Fostering entrepreneurial attitude ... Support & assist Home based businesses

2. SBus: Make it easier for entrepreneurs to find one single place to go to take a start your own business course locally that will cover a variety of topics - lunch box sessions are great, but not comprehensive and timely enough for the excited entrepreneur. Currently they go to Calgary to MRC or Chinook College for this kind of learning - it's not locally minded
3. SBus: Identify industry sectors that don't need to be in big urban centre but rather are conducive to set up in Airdrie or another regional community
4. SBus: Telework opportunities. support any initiatives that allow people to work from their homes
5. SBus: Determine landscape and partnership/consolidation opportunities.
6. SBus: regional finance and marketing support
7. SBus: Develop an "ask the experts" volunteer program for business owners to access the variety of expertise found in Airdrie - marketing, finance, etc.
8. SBus: Coordinate the development and disbursement of small business related resources.
9. SBus: Promote and encourage development of Airdrie Group mentioned by Lorna and Ken for local education for small business or entrepreneurs
10. SBus: Mentoring program // create a mentoring program for small business
11. SBus: publish success stories //Encourage local media to advertise success stories through regular good business stories pages or sections
12. SBus: set up accounting/ financing system for multiple small businesses to work together for shares in housing and business construction, work together rather than separately on ventures

13. SBus: Create a method of advertising career opportunities for professionals in the region. So they don't go elsewhere for work. Not a very good system currently.
14. SBus: one stop shop for all small business information (eg: Bizpal) or better promote these opportunities
15. SBus: Identify key business leaders and provide them with the tools they need to direct potential entrepreneurs in the right direction - give them "So you Wanna be an Entrepreneur" brochures they can hand out, let them be your salespeople
16. SBus: A large portion of the chamber membership is the 1-2 businesses so there is a huge opportunity for the Chamber to include & support the HBB community. The chamber should have programs that appeal to all their members. As the business community grows so does the responsibility of the chamber. Surrounding chambers should support each other as well.

OPPORTUNITY: Outward marketing of the opportunities that may be found (i.e. Airdrie is not a hick town!) //Definitely promote success stories - maybe an ad campaign featuring prominent or award winning local business owners - use them to inspire and challenge others -> international recognition

2. MARKET: advertise internationally rather than just to Calgary, growing world population looking for new place to live & work
3. MARKET: region work closer with province to do international and national markets (doesn't seem coordinated)
4. MARKET: Do marketing to promote regional opportunities - similar to Airdrie's book that promotes Airdrie - but regional promotion
5. MARKET: extended distribution of AirdrieLIFE
6. MARKET: use the web intelligently
7. MARKET: The Calgary Herald has a regular supplement on the local towns/cities that had features on business owners, recreational opportunities - these were great, how can we leverage them? Possibly wider distribution? Explore similar opportunities online, with the Calgary Sun, FFWD magazine, Metro and 24
8. MARKET: financial incentive plans to move here (matching money on investments at lower rate)

OPPORTUNITY: create promotional strategies to promote local shopping //Encourage cross marketing opportunity - some of us have established partnerships with like minded businesses, but most Airdrie business owners don't get involved with supporting others in order to help themselves too

2. SHOP: Identify and communicate a consistent brand
3. SHOP: promote local commodities/services over international or out of region // Market the benefits of "shopping" locally. How does it benefit the every day person?
4. SHOP: Make parking in downtown easier - bring in unique shops (ice cream parlor, etc).
5. SHOP: educate and encourage local businesses to advertise and develop their own promotions and co-operative promotions
6. SHOP: Start an Airdrie Bucks campaign - When shopping locally - collect Airdrie Bucks that can be spent within Airdrie during a special redemption time
7. SHOP: Create city wide campaigns, events, promotions. Midnight Madness is very popular, and the local papers run ad supplements, but the individual stores participating rarely help each other by reminding shoppers what other stores are open, etc. Get events happening, and promote ideas to business owners of how they can cooperate.
8. SHOP: advertiing 101 most small businesses have no clue how to budget and create marketing strategies that work

OPPORTUNITY: work in consort with the agricultural community ...opportunities for strong agricultural industries for world markets

2. AG: Develop marketing for buying locally rather than buying imported produce etc... Why does that benefit us?
3. AG: long term land use, development and infrastructure planning/vision
4. AG: A small local farmers market of some kind? Scientific crop research opportunities?
5. AG: Regional mandate for future development
6. AG: Local greenhouses - needed for winter - to grow produce and keep dollars in area
7. AG: encourage dialogue with likeminded communities in other parts of the world
8. AG: co-operative investment in grain production and marketing, for higher yields and shared opportunity by pooling resources, shares in land and in crop production or assistance. (world demand about to rise very sharply)
9. AG: Work with agriculture to supply products to local/regional businesses using their products (eg. beef, poultry, vegetables, eggs, etc.)
10. AG: Let's get a real farmer's market - one that has product for more than two weeks. An indoor farmer's market could have stalls rented to local artisans - Bearspaw has a very popular and well attended farmer's market all summer, ours is terrible

F – Brainstorm action plans by category (EDOs)

OPPORTUNITY: Telework - distributed work centres ..technological advances and opportunities for remote workforce collaboration ..Fibre Optic connectivity for all communities - rural areas .

2. Developing satellite distributed work centres in region (that complement CED initiatives)
3. Political support from municipal leaders - may initiate action
4. government incentive - LT (e.g. enviro credits?!) //incentives / credits
5. Educate business leaders and local work forces // educating regional business and industry how they can use telework opportunities and how it can benefit their business
6. market/promote telework to target audiences // Market telework to commuters that work outside of core CRP communities eg. Towers in Calgary
7. develop recruitment strategy targetting single and/or stay at home parents / elderly
8. communication, communication, communication

OPPORTUNITY: Renewable, Alternative energy and carbon sequestration

2. Centre of excellence // Develop a centre of excellence in renew energy (and tie in with university / R&D community)
3. Coordinated raw materials transportation and collection
4. Enhanced power grid distribution and power storage capacities
5. collaborative/congruent policies (at municipal levels)
6. incentives for business for development
7. consumer opportunities to purchase (muni policy should encourage use of bio-fuel)
8. Develop regional policies to make it attractive for companies to operate in region - ie. municipal land use bylaws that allow for residential solar panels, wind energy generators, low flush toilet incentives
9. Lobby as a region for incentives (tax and R&D) and policy guidelines to support use
10. Encourage businesses to recycle, conserve water, run more environmentally friendly

OPPORTUNITY: Building Products (wood and non wood)

2. Nano-tech insulation applications (wall board, bat insulation, windows)
3. Hemp products & local hemp farming
4. Add in stubbing for solar technologies for residential and commercial application- small scale wind turbines
5. Build on work completed to date on Wood and Non wood business cases
6. product diversify for existing building product companies - business growth & retention

OPPORTUNITY: Eco industrial parks (eg Hinton) ..Environmental product companies,

2. framework for business to locate in a Eco-park - bylaws, criteria, infrastructure support
3. Closed system of energy production, energy use, and waste heat utilization (no net loss system)
4. Land use bylaws to support eco industrial development
5. develop strategy/framework outlining how a specific company/sector's outputs can be used as inputs for another business - maximize dollar savings and minimize waste
6. Land identification and consolidation of land owners...green roof, grey water recycling, green development attraction for industrial- Prestige Eco Industrial Parks that limit impact on environment

OPPORTUNITY: Value added... refining primary products into value-added products in the Region/ AB/ Canada agri-value (grow local food product awareness, cluster development around food processing/growing/shipping) ..Food Processing- Cargill and various spin offs ..Ethnic food production (herbs, spices, Halaal meats, lentils, ancient grains)

2. Introduce other energy sources to power value added ag opportunities
3. educate producers and consumers about the kinds of "heritage" foods unique to the region, and develop that as sustainable regional production
4. Incubator, mentoring, R&D opportunities to support innovators
5. Work with existing large industry to determine what products can be manufactured in Alberta. Eg/ Cargill- stop shipping raw ingredients around North American- more Alberta based manufacturing needed
6. Value-added friendly land use policies
7. encourage development of better storage and transportation to support value-added activity
8. networking initiatives amongst producers/businesses, etc. to foster opportunities
9. promote '100 Mile Diet' and lifestyle

OPPORTUNITY: Transportation & Warehousing Logistics ..Opportunities that will develop as a result of Asia Pacific Gateway strategy ..corridor development (e.g industrial)

2. Commuter rail, public transit to move people within the region - affordably, sustainably
3. Develop joint marketing programs, enhance staffing and human resources for industrial corridors- Need planners to complete ASP reviews
4. Green model (bio diesel)
5. Green inter-modal rail and road (container handling, stuffing)
6. identify opportunities/partner for regional transportation initiatives (e.g. bus systems, light rail)

OPPORTUNITY: tourism development (e.g. product development & destination marketing) ...ag tourism

2. Build on the wellness tourism project currently in place in Canmore
3. Educate business re marketing - targeting external vs internal audience (refer to negative connotation of cowboy "wild west" OR positive connotation of "get 'er done")
4. product development and packaging - incorporated into regional marketing //product packages for existing tourism assets, especially ag-tourism
5. Identify external market and promote B&B's, experiential tourism including agri-tourism
6. Niche tourism market development (Japanese, seniors, eco, etc.)
7. Canadian Badlands Ltd. initiative and development strategy
8. Community Beautification strategies need to be developed with former Business Improvement areas and zones
9. collaborative regional marketing for tourism destinations
10. foster/promote tourism knowledge development amongst operators (e.g. parternships - Travel Alberta)

OPPORTUNITY: Professional & Technical Services (eng'g, etc.)

2. Development of post secondary facilities and satellite campus- general arts, engineering, english, etc.- LT Bring post secondary closer to the communities in the region- technology or physical campus
3. Specialized professional services in geotechnical, petroleum engineering, etc.
4. partner educational institutions with industry & secondary education facilities
5. lifestyle/appeal marketing to HBB/telework professionals
6. bring in external resources into our communities for rual application
7. Increase avaialble office space in CRP communities
8. specialized educational oportunties related to area industry/businesses (eg apprenticeship programs) in communities
9. Business incubator to support start-ups

G – Process Overview

Strategic Planning and Community Consultation process

The strategic planning process included an information gathering component composed of a series of interviews and community consultations. The purpose of this component was to get input from a broad cross section of stakeholders on the strengths, weaknesses, opportunities, threats and future directions of the organization.

The stakeholders consulted include:

- representatives from areas surrounding Cochrane, Okotoks, and Airdrie

The expert panel was conducted using an electronic meeting system (EMS), an innovative facilitation process developed from research at the Queen's School of Business. The Queen's EMS, called "the Decision Centre", combines expert facilitation with a state of the art group decision support system to enable groups to rapidly accelerate idea generation and consensus building. This facility consists of a network of laptops accessing software designed to support idea generation, idea consolidation, idea evaluation and planning. The tool supports, but does not replace, verbal interaction; typically 25% of interaction takes place on the computers. Feedback from groups who have used the Executive Decision Centre process includes: meeting times can be cut in half; participation goes way up; better idea generation and alternative evaluation; a more structured process; and automatic documentation of deliberations.

Over 500 organizations around North America use the Centre for meetings such as: strategic planning, visioning, annual planning, focus groups, team building, budgeting, program review, project planning, risk assessment, job profiling, 360 degree feedback, alternative evaluation, new product development and a variety of other meeting types.

In the expert panel session, participants were asked, for example, "What opportunities are there to stimulate new economic growth, investment and interest in the region?" Participants typed in ideas on the laptops all of which appeared on a public screen at the front of the room. These ideas were then discussed and categorized into common themes. The group was then asked "what are the best ideas based on impact and feasibility" Individuals selected his/her top 5 and the overall results were then displayed to the group and further discussed.

Appendix IV

Interview and Focus Group Participant List

Interview and Focus Group Participant List

One to One Interviews

Adam Legge, Calgary Economic Development

Alex Umnikov, Government of Alberta, Commercialization Capacity, Advanced Education and Technology

Asad Niazi, Bordeaux Developments

Brenda Stanton, Hospitality Management Consultant

Bruce Graham, Calgary Economic Development

Caroline Fairbrother, Government of Alberta, Employment and Immigration

Catherine Barclay, Western Economic Diversification Canada, Policy and International Commerce

Cathy Huth, Okotoks & District Chamber of Commerce

Cheryl Actemichuk, ATB Financial

Cheryl Skelly, Town of Crossfield

Chris Heseltine, Government of Alberta, Advanced Industries and International Operations, International and Intergovernmental Relations

Clifford Hurt, Crossfield History Society

Colleen Shepherd, Calgary Regional Partnership

David Peace, Government of Alberta, Aerospace and Defence Industry, Advanced Industries Development Unit

Diane Simsovic, Government of Alberta, Advanced Industries Development Unit, Finance and Enterprise

Dr. David Chalack, Alta Genetics

Duane Pyear, Government of Alberta, Economic Policy and Analysis, Finance and Enterprise

George Brosseau, Government of Alberta, Regional Development, Finance and Enterprise

Jacky Vang, Town of Crossfield

Jennifer Brooks, Community Futures Wild Rose , Strathmore

Jessie E Hislop, Foreign Affairs and International Trade Canada

John Leurdyke, Building Products, Advanced Industries Development Unit

John Lockhart, Community Futures Highwood

John Masters, Calgary Technologies Inc.

John Samms, Tourism Canmore

Justin Reimer, Government of Alberta, Industry Development, Finance and Enterprise

Lee Novak, Hospitality Consultant

Monique LeBlanc, Community Futures Highwood

Pat Firminger, Government of Alberta, Community and Business Services, Employment and Immigration

Paul McLaughlin, Government of Alberta, International Logistics, Advanced Industries Development Unit

Peter Wallis, Van Horne Institute

Rick Sloan , Government of Alberta, Enterprise Division, Finance and Enterprise

Robert Hornbrook, Government of Alberta, Rural Initiatives and Research Unit, Agriculture and Rural Development

Ron Laycraft, MD Foothills

Ron Popek, Government of Alberta, Rural Development Division, Agriculture and Rural Development

Sandi Kennedy, Remax Real Estate, Former Okotoks Mayor, Chair of Economic Development Committee

Shari Bishop, Bowes, Three Sisters Mountain Village

Susan Henderson, Government of Alberta, Marketing and Operations, International and Intergovernmental Relations

Cochrane Focus Group

Amy Flowers

Asad Niazi, Bordeaux Developments

Daran Fletcher, Insight Image Services

Doreen Wilson, Bethany Care Society

Gerri Polis, Cochrane & District Chamber of Commerce

Helen Parnell, Stagecoach GMAC Real Estate

Jason Quantz, Spray Lake Sawmills

Maihaa Rayne

Randy Mabbot, Grand Central Properties

Shelley Lukasavitch

Todd Simmer, Big Sky Landscaping

Okotoks Focus Group

Alan Switzer, Ooh La La Catering

Barry Williamson, Town of Turner Valley Council

Cathy Huth, Okotoks and District Chamber of Commerce President

Cheryl Actemichuk, ATB Financial

Chris Fields, Rynic Communications

Dave Jackson, Country Chrysler

Dusty Dancer, DeWinton Community Association

Kimberley Switzer, Ooh La La Catering

Marg Cox, Town of Okotoks

Mark & Tara, Goldenwest Broadcasting

Maureen Nelson, Town of Turner Valley Citizen Rep

Monika McLachlan, All Through the House

Roland Smith, Okotoks Glass

Ryan Sawatzky, Devopments2 Inc.

Shane Olson, Town of Okotoks (Economic Development)

Stacie Symington, CF Highwood

Tannis Andrejcin, Century 21 (Okotoks Economic Development Committee)

Teresa Phelan, Blackie Community Association

Tessa Nettleton, Okotoks Public Library

Victoria & Robert, A Touch of Italy

Yves Mercier, Simply Floors

Zack Straker, Millarville Racing and Agricultural Society

Airdrie Focus Group

Andy Zimmer, Airdrie Employment Services

Ann Schuler, Rocky View Adult Education

Christopher Harper, Community Links

Daniel Stimson, Siksika Employment

Glen Walker, Bow Valley Credit Union

Kent Rupert, City of Airdrie

Lorna Hunt, Airdrie Chamber of Commerce

Maria Elliott, Volunteer Airdrie, Chair

Norman Miller, Providence Construction

Sarah Deveau, Cater Tot Consignment

Sharon Sinclair, Sutton Group Real Estate

Shawn Keeper, Mattamy Homes

Sherry Shaw, Froggatt Frog Inc Publishing & Marketing

Economic Development Officers Focus Group

Barry Schlinker, Department of Foreign Affairs and International Trade

Dave Kalinchuk, Municipal District of Rocky View

Jennifer Brooks, CF Wild Rose

Joann Churchill, Town of Cochrane

Kent Rupert, City of Airdrie

Leona Esau, City of Airdrie

Marilyn MacArthur, Town of High River Economic Development

Monique LeBlanc, CF Highwood

Sara Chamberlain, City of Airdrie

Scott Pickard, CF Centre West

Shane Olson, Town of Okotoks

Troy Payne, Calgary Regional Partnership

Mayors Focus Group

Linda Bruce, Mayor of Airdrie

Garry Pollock, Councillor Turner Valley

Phil McCracken, Councillor Crossfield

Gordon Branson, Councillor MD Rocky View

Hopeton Loudon, Deputy Reeve MD Rocky View

Patricia Matthews, Mayor of Chestermere

Bill McAlpine, Mayor of Okotoks

Beth Kish, Councillor Okotoks

Ron Casey, Mayor Canmore

Linda Fox-Mellway, Councillor Calgary

Les Rempel, Mayor High River

Shirley Reinhart, Deputy Reeve, Wheatland County

Don Vander Velde, Councillor Wheatland County

Bill Szabon, Councillor Nanton

Truper McBride, Mayor of Cochrane

Joann Churchill, Councillor Cochrane

Michel Jackson, Councillor Black Diamond

Appendix V

CRP Members Economic Development Shared Priorities

CRP Members Economic Development Shared Priorities

	Airdrie	Banff	Black Diamond	Calgary	Canmore	Chestermere	Cochrane	Crossfield	High River	MD Foothills	MD Rocky View	Nanton	Okotoks	Strathmore	Turner Valley	Wheatland County
Key Themes	Business Development	N/A		People & Community	Business Retention and Attraction	N/A	Business Retention and Expansion	N/A	Business Attraction		Business Retention and Expansion	N/A	Manage Community Growth	N/A	N/A	N/A
	Healthy Communities			Business & Enterprise	Sustainable Environment		Business Attraction		Entrepreneurial Support		Business Development		Economic Vitality			
	Sustainable Business			International Reach							Business Attraction		Environmental Responsibility			
	Investment Attraction										International Business					
Primary Sector Targets	Advanced Manufacturing	Tourism	Tourism	Energy	Sustainable Tourism	Tourism	Tourism	Agri-business	Green Building Products	Value Added Agriculture	Manufacturing	Tourism	Value Added Agriculture/ Food Processing	Tourism	Tourism	Tourism
	Professional, Scientific, and Technical Services			Financial Services	Health & Wellness			Film	Film Industry	Trucking and Transportation	Tourism		Technology & Innovation			
	Environmental Industries			Health & Wellness	Art & Culture			Manufacturing	Tourism	Warehousing, and Distribution	Value Added Agriculture		Tourism			
				Transportation & Logistics	Advanced Technologies			Tourism		Tourism	Warehousing and Distribution		Alternative Energy			
				Environmental Technologies	Education & Research	Attraction							Environmental Products & Services			
				Value Added Manufacturing	Film Production											
				Niche Information, Communication & Technology												
				Creative Industries												
				Aerospace												
				Film												
			Tourism & Convention													
Other Considerations	Downtown Revitalization	N/A	Downtown Revitalization	Workforce Attraction	Workforce Development + Training	Business Attraction	New Business Start-ups	N/A	Heritage Shopping District	Industrial Development	Business Parks	Downtown Revitalization	Home-based Business	Business Attraction	Downtown Revitalization	N/A
	Sports Tourism		Commercial Development	Teleworking	Business Attraction	Business Retention + Expansion	Home-based Business		Arts District	Natural Resource Development	Co-Generation and Eco-Power Production	Business Attraction	Business Attraction	Business Retention + Expansion	Entrepreneur + Small Business Development	
	Home-based Business			Film Commissioner	Business Retention + Expansion	Entrepreneur + Small Business Development	Business Attraction		ECO Park	Business Parks	Water and Sewer	Business Retention + Expansion	Business Retention + Expansion	Entrepreneur + Small Business Development		
	Business Attraction			Global Business Centre	Entrepreneur + Small Business Development		Business Retention + Expansion		Industrial Corridor	Retail	Business Attraction	Entrepreneur + Small Business Development	Entrepreneur + Small Business Development	Workforce Development + Training		
	Business Retention + Expansion						Entrepreneur + Small Business Development		Post Secondary Education	Farmers Markets	Business Retention + Expansion	Workforce Development + Training				
	Entrepreneur + Small Business Development								Business Attraction	Specialty or ethnic food	Entrepreneur + Small Business Development					
Workforce Development + Training								Business Retention + Expansion	Filming industry	Workforce Development + Training						
									Entrepreneur + Small Business Development							

Source: Relevant CRP member economic and municipal development strategies and web sites. Additional information provided by CRP based on economic development questionnaire.