

Alberta Urban Municipalities Association



First Impressions Community Exchange Alberta Pilot Program

Final Report

Submitted To: Alberta Urban Municipalities Association
Attn: Rachel Boccock, Project Manager

Submitted By: Shelagh Thurlbeck

SMT Business Services Inc.

24 – 51528 Range Road 262
Spruce Grove, AB T7Y 1C1
Ph: (780) 418-1884 Fax: (780) 418-1885
Email: Shelagh@SMTconsulting.ca

Submitted On: November 27, 2008

TABLE OF CONTENTS

1.0	Background and Introduction	1
2.0	Significant Highlights of the Alberta FICE Pilot Program	1
	2.1 The Participating Communities	1
	2.2 Overview of the Project Process	2
	2.3 Significant Highlights of the Alberta FICE Community Process	2
	2.4 Support from the Consulting Team	3
3.0	Significant Highlights of the Findings/Learnings from the Alberta FICE Pilot Program	3
	3.1 Significant Highlights of the Findings related to Perceptions of the Participating Communities	3
	3.2 Significant Highlights of the Learnings	4
	Appendix A: Approach and Process	6
	Appendix B: Highlights of the Alberta FICE Pilot Process	11
	Appendix C: Summary of the Learnings and Recommendations from the Alberta FICE Pilot Process	18

1.0 BACKGROUND AND INTRODUCTION

The First Impressions Community Exchange (FICE) is a program that has deep roots in community economic development and planning. It is a structured and respected process that provides participating communities with an unbiased and fresh perspective of the community's physical and structural appearance, services and infrastructure based on the first impression of "outsiders" such as tourists, newcomers, new Canadians, potential investors and retirees. Participating communities have the opportunity to learn more about their strengths, capacity and opportunities for improvement.

The Alberta Urban Municipalities Association (AUMA) initiated a pilot of the First Impressions Community Exchange Program to assist in developing an overall tool that would help Alberta's municipalities build communities, foster regional community collaboration and use the tool to enhance sustainability. This project, funded by Alberta Agriculture and Rural Development (ARD), will assist the AUMA and the communities in learning more about strengths, areas for improvement, and opportunities through the eyes of a first time visitor.

This report provides an overview of the process and results of the pilot, together with recommendations to improve the process and maximize the value of the program to the participating communities.

2.0 SIGNIFICANT HIGHLIGHTS OF THE FICE PILOT PROGRAM

The Alberta FICE pilot was very successful based on the following:

- 100% of the participating communities completed the program
- 100% of participating communities stated that they would recommend the project to other communities
- almost all of the participating communities indicated that it would be very valuable to repeat the program, suggestions ranged from annually to every 5 to 7 years
- Visiting Team members stated that they had all learned something about their own communities, that they will look at both their own communities and others in a different way in the future, and that they enjoyed the process
- all communities valued the opportunity for collaboration with other communities
- 100% identified priority items from the reports provided by their matched communities
- at the writing of this report 13 communities have completed action plans based on those priority items and the remaining one has identified the key priorities and will develop the action plan in the immediate future
- 78% of communities have identified individuals to lead the planned action projects.

2.1 The Participating Communities

Fourteen communities were selected from the twenty-four applications submitted. The communities were matched as follows:

- | | | |
|-----------------------------|---------------------------|--|
| • Brooks and Cochrane | • Gibbons and Tofield | • Rimbey and Sundre |
| • Drumheller and High River | • Innisfail and Westlock | • Rocky Mountain House and Slave Lake. |
| | • Marwayne and Waskatenau | |

2.2 Overview of the Project Process

This pilot of the Alberta FICE program involved a series of activities and milestones to be achieved within specific timelines. The Consulting Team was actively engaged in all components. Following is a brief overview of the key activities that occurred over the 12 month duration of the project (a detailed schedule of activities can be found in Appendix B):

- developing the project plan
- redevelopment and/or development of the FICE process and associated documents
- application for the program
- selection and pairing of pilot communities
- orienting communities
- selecting and orienting FICE program Coordinators and alternates
- selecting and orienting Visiting Teams
- conducting the Exchange Visit
- developing the Exchange Report and presentation
- presenting the Exchange Report to the paired community
- briefing Council on the results of the report
- identifying priority action items through a community planning process
- developing an action plan
- developing the final report on the pilot project.

2.3 Significant Highlights of the Alberta FICE Community Process

The following provides an overview of the significant highlights with respect to what occurred at the community level throughout the process (details can be found in Appendix B):

- the Visiting Teams averaged 5 to 6 members per team
- the majority of Visiting Team members and communities felt well prepared and found the support of the Consulting Team to be valuable
- with the exception of 3 communities, the average time spent in the community was 4 hours
- the average time spent travelling to and from the Exchange Community was 5.4 hours
- community choice questions focused on the physical attributes of the community, customer service and friendliness of the residents, the suitability and availability of their recreation and tourism facilities, and existing and potential business and commercial development
- all report back meetings were conducted in neutral communities located partway between the paired communities and were supported by a member of the Consulting Team
- on average communities spent about 10 hours developing the report and presentation for the report-back meetings with their paired communities and the meetings themselves averaged 3.5 hours in length
- 72% of communities used community-based organizations such as community panels, economic development boards, etc. to focus their planning and identify their priority items
- action plans addressed such issues as signage, the downtown areas, tourism facilities and services, business recruitment and retention, and commercial land development.

2.4 Support from The Consulting Team

By addressing challenges and recommendations during the pilot, a model was demonstrated in real time with real issues that communities will be able to use in working through other issues.

It should be noted here that although other jurisdictions using the FICE program indicated that one or more communities could be expected to “drop out” of the program, **100% of the communities in the Alberta pilot project completed the program and achieved their milestones.**

The Consulting Team provided support, suggestions and guidance, and responded to questions throughout the process and at all stages of the FICE pilot including but not limited to:

- assisting Coordinators with retaining focus and staying on track to ensure completion of the process and achievement of the program milestones
- help with identifying and prioritizing FICE recommendations that fit with their strategic plans
- assisting the communities in learning how to non-defensively give and receive feedback via the demonstration and facilitation involved with our collaborative model
- the on-going encouragement and enthusiasm required to motivate the Coordinators and engage the communities.

A summary of the value-added components provided by the Consulting Team can be found in Appendix A.

3.0 SIGNIFICANT HIGHLIGHTS OF THE FINDINGS/LEARNINGS FROM THE FICE PILOT PROGRAM

A number of noteworthy findings and learnings emerged from this pilot project, arising from several sources including:

- the best practices review
- the Alberta FICE process itself
- the Coordinators
- the wrap up community summaries
- the Visiting Team member evaluations.

3.1 Significant Highlights of the Findings from Participating Community Input

One of the critical findings was that communities hunger for honest feedback on “how they’re doing” and “what they can do that will be more meaningful for their home communities and their regions”. They are looking for opportunities to share information, learning from each other and collaborating on a variety of levels. The importance of this process and the value of this openness was evident in the report-back meetings. The Bottom Line is that this collaborative and community-driven process worked.

The commitment of the participating communities was evident in that:

- all communities identified areas of opportunity and enhancement from the reports
- some began immediate implementation of ideas prior to the action planning
- some communities created both short and long term plans
- one community was so pleased with the project, the process and the outcome that they are contemplating finding ways to duplicate some pieces annually with partnering communities.

The key findings from participating communities around value of the FICE program to them were:

- greater awareness and understanding of their own communities, and enhanced appreciation for what they have versus what they “have not”
- the added “weight” that an objective outside opinion provides to existing issues and concerns
- opportunities to learn and share ideas, methods, practices and successes with other communities
- the motivation to begin projects that have been on the backburner, given the enthusiasm of their teams resulting from the project.

The recurring themes around recommendations for the FICE program were:

- a need for more time in the community (including overnight stays) to ensure that the areas in the questionnaire were addressed
- an interest in the various ways that the pilot communities approached the process
- a need to review the timing of the program so that the Exchange Visit does not occur in the summer months of July and August.

3.2 Significant Highlights of the Learnings

The FICE pilot program resulted in meaningful learning that will impact significantly on the success of future programs. Detailed information on the learnings and associated recommendations can be found in Appendix C.

Table 1: Significant Learnings and Associated Comments

Learning	Associated Comments
Timing is important	<ul style="list-style-type: none"> • it is important to start early and complete visits prior to vacation, so that all can move into reporting back in late August, or early September before they ramp up for fall activities • timing can be important to action plans that require funding can also be appropriately planned within the balancing and planning of budgets
The community driven process worked	<ul style="list-style-type: none"> • including volunteers from various sectors of the community on the Visiting Team provided a effective and diverse balance • feedback was readily embraced from an objective group of community members representing a similar community • the community took responsibility for taking action

Learning	Associated Comments
Alternates or co-coordinators are critical to the process	<ul style="list-style-type: none"> • the best practice scan showed that alternates were critical • 2 experiences during the FICE pilot supported that finding • should a coordinator be unable to continue due to ill health, family situations, job change, or other changing priorities it is important that an alternate be part of the process from the onset
The program and questionnaire could be tailored to community size	<ul style="list-style-type: none"> • the time required to “FICE” a small community versus a large community is different • for smaller centers, it was perceived that the questionnaire had some redundancies • for the larger centers, the repeat questions (around entrances for example) were less of an issue
Facilitation/communication ensures ongoing focus and completion	<ul style="list-style-type: none"> • 100% of communities completed the program successfully • the orientation, coaching and ongoing support was valuable to Coordinators in staying focused and on track and ensuring program completion • both the Coordinators and the best practice scan indicated that on-going communication and contact was vital to the success of the program • facilitation of community meetings was appreciated
There is an opportunity to provide ideas and information on the various ways that the pilot communities worked through the process	<ul style="list-style-type: none"> • communities conducted parts of the process in different ways (e.g. in some cases the entire team “ficed” the community with each team member working through the whole questionnaire and in other cases they divided up into groups of 2 or 3 with each group working through a specific component of the questionnaire)

Appendix A:
Approach and Process

A. APPROACH AND PROCESS

A.1 Purpose

The purpose of this project was to develop and implement a provincially appropriate FICE program including the development of the process and the associated documents. Within that purpose several objectives were identified and achieved:

- develop a project plan
- develop a selection process for pilot communities
- identify partners and roles
- provide FICE orientation and training to community coordinators
- assist communities in the implementation of the FICE process
- report on overall implementation including goals and outcomes
- summarize recommendations to assist in planning for future FICE projects
- provide a final report upon completion of the pilot project.

A.2 Value Added Components

The Consulting Team added value to the project with a number of enhancements to the scope of work.

Table A1: Value Added by the Consulting Team

Enhancements / Value-Added Components
<ul style="list-style-type: none">• Developed and presented project introduction to Advisory Group• Researched and developed best practices scan• Provided recommendations to Advisory Group and Project Manager regarding communication ideas, tools and opportunities• Researched and developed application forms and process• Developed matrixes based on selection criteria and process for selection and reviewed application forms and associated data from 24 communities• Developed suggestions for selection and pairing• Attended meeting with Advisory Committee re: community selection and pairings• Developed a PowerPoint training tool to orient the Coordinators to the FICE program and the various documents associated with it• Developed a PowerPoint presentation for Coordinators to use in orientating their Visiting Teams• Developed a list of Q & A resulting from Coordinator comments and questions• Developed instruction guide to assist Coordinators with the completion of the report-back meeting report and PowerPoint presentation• Assisted Coordinators with logistics and planning of report-back meetings• Developed a PowerPoint presentation in coordination with the report for the report-back meeting providing an introduction and guide for the meeting and an agenda for the next steps discussion• Sourced space appropriate and neutral for the communities to meet for the report-back meeting• Attended at all 7 report-back meetings between the communities and facilitated 4 of the planning sessions• Provided laptop and AV equipment for 4 of the meetings• Developed template and process for Council debriefing• Developed action planning template• Developed wrap up summary template

A.3 Approach

All projects undertaken by SMT involve establishing a close working relationship with the client. Our approach is a co-operative one in which the Project Manager, Rachel Boccock, and the Small Communities Committee contributed experience with respect to Alberta communities and the background of the Pilot, while the Project Team brought expertise with respect to research, planning and coordination, and communication and collaboration tools; inclusively applying all to bear on the success of this project.

A.4 Methodology

The proposed methodology involves the following phases:

- Phase I: Design of the Framework
- Phase II: Data Collection and Analysis
- Phase III: Development of Findings and Pilot Project
- Phase IV: Training and Implementation
- Phase V: Development and Submission of the Final Report

During the course of the project:

- more than 30 interviews were conducted with developers, coordinators and users of the FICE program in other jurisdictions
- more than 60 documents, articles, websites, etc. were reviewed
- over 20 documents were modified and/or customized.
- a number of additional templates and documents were developed to assist the communities through the process and the Consulting Team in providing orientation and support.

A.5 The FICE Pilot Program Process

The project involved a number of activities from November 2007 through November 2008. The Consulting Team drove and/or was actively engaged in all events and activities. The Consulting Team worked closely with the FICE Project Manager in confirming the documents and identifying the participating communities.

In addition regular progress reports were submitted to the Project Manager outlining the activities as per the project plan, the outcomes to date, the value added components, emerging concerns, and upcoming requirements.

Table A2: FICE Pilot Program Process

Activity	Consulting Team Responsibility	TimeFrame
Project plan	<ul style="list-style-type: none">• develop project plan scoping the approach for the project including milestones, timelines and budget allocation	November through December 2007

Activity	Consulting Team Responsibility	TimeFrame
<p>FICE pilot process and tools:</p> <ul style="list-style-type: none"> • design the process based on best practices in other jurisdictions and the Alberta perspective • redevelop (tweak) materials for Alberta's use 	<ul style="list-style-type: none"> • research of existing programs and corresponding materials • review of best practices • tailor the process for the FICE pilot for Alberta • re-develop (tweaking) and/or develop the tools appropriate to Alberta including customizing and/or developing the following: <ul style="list-style-type: none"> - Coordinator's Guide - Visiting Team Member's Guide - Visiting Team Member's Questionnaire - Various tools and templates for the appendices of the Coordinator's Guide - Presentation tools for the roll-out 	December 2007 through May 2008
<p>FICE pilot communities:</p> <ul style="list-style-type: none"> • application, selection and pairing 	<ul style="list-style-type: none"> • assist with developing application form and commitment letter • review applications • provide input for the selection and pairing 	February through May 2008
<p>Orientation:</p> <ul style="list-style-type: none"> • orienting communities to the project, process and documents • selecting and orienting FICE program Coordinators and alternates • selecting and orienting Visiting Teams 	<ul style="list-style-type: none"> • prepare and distribute of all documents and materials for FICE • identify FICE program Coordinators and alternates within each community • individual orientation meetings with the FICE coordinators in each community • assist in the selection of the Visiting Team 	May through June 2008
<p>Exchange Visit:</p> <ul style="list-style-type: none"> • determining the date for the Visit • reviewing the questionnaire with the Visiting Team • conducting the Exchange Visit 	<ul style="list-style-type: none"> • coaching and supporting the Coordinators • assist in preparing for Exchange Visits • debrief the Exchange Visits 	June through August 2008
<p>Reporting back:</p> <ul style="list-style-type: none"> • development of the report and presentation • selection of a date for the communities to meet and identification of a geographic location and venue • presentation of the report to the paired community 	<ul style="list-style-type: none"> • assist with the development of and/or review the reports and presentation formats for consistency and content • coordinate logistics including dates and geographically appropriate locations and venues for the communities to meet • facilitate the presentation of their reports • debrief the report-back process 	August through September, 2008

Activity	Consulting Team Responsibility	TimeFrame
Community planning: <ul style="list-style-type: none"> • briefing Council on the results of the report • identifying priority action items through a community planning process • developing an action plan 	<ul style="list-style-type: none"> • assist with preparing for the briefing of Councils on the results of the report • assist with determining the process for community planning • develop the format and tools to assist in the implementation and action planning • facilitate the community planning session if requested • review the action plans as needed 	October through November 2008
Final reporting: <ul style="list-style-type: none"> • a report on the overall implementation of the FICE program 	<ul style="list-style-type: none"> • develop the final report on the FICE pilot including recommendations to address challenges and capitalize on opportunities 	November 2008

A.6 Support From The Consulting Team

The Consulting Team worked carefully and diligently to step the Coordinators through the project. While we found that some communities required a greater degree of support than others, the Consulting Team had planned for the following level of support at a minimum:

- 10 telephone contacts per community (in actuality the contacts well exceeded the expectations e.g. 15 – 30 emails per community and in many cases more than 10 phone contacts)
- 3 in-person contacts per community including facilitating orientation, facilitating report-back meetings and facilitating of planning and implementation meeting
- review 2 reports from each community (the Exchange report after their visits, and their summary report which included the action plan and in some cases assisting with the integration of the FICE action plan with the MSPs)
- each community had the option of having a facilitator for their planning and implementation meeting (four of the communities used a member of the Consulting Team to facilitate their planning session).

Appendix B:

Highlights of the Alberta FICE Pilot Process

B. HIGHLIGHTS OF THE ALBERTA FICE PILOT PROJECT

This section reflects the findings and observations with respect to:

- the FICE community process
- the perceptions of the participating communities
- the outcomes.

B.1 The Alberta FICE Community Process

The following chart provides an overview of the findings related to the participation of the communities in the Alberta FICE pilot project.

Table B1: Findings Related to the Alberta Community Process

Component	General Findings
Visiting Team	<ul style="list-style-type: none"> • Visiting Teams averaged 5 to 6 members per Team • more females than males participated • all Visiting Teams included a business owner, a representative from Economic Development and a member of community administration or Council • several Visiting Teams included a member of the Chamber • most Visiting Teams included a student and senior • two Visiting Teams included a new Canadian
# of Hours Spent in the Exchange Community	<ul style="list-style-type: none"> • with the exception of 3 communities, the average time spent in the Exchange Community was 4 hours • because of the distance Rocky Mountain House and Slave Lake overnighted in the Exchange Community • Westlock chose to overnight in Innisfail
# of hours spent travelling to and from the Exchange Community	<ul style="list-style-type: none"> • the average time spent traveling to and from the exchange community was 5.4 hours
Community Choice Questions	<ul style="list-style-type: none"> • each Community added two specific questions to the questionnaire for the Visiting Community (community choice questions) • most of the communities included a question on the physical attributes of the community; be it the entrances, the downtown, etc. • several communities included a question around the customer service, friendliness of the residents, etc. • some communities included a question around the suitability of the type and availability of their recreation and tourism facilities • some communities included a question around existing and potential business and business development

Component	General Findings
Reporting Back	<ul style="list-style-type: none"> • 79% of the FICE Coordinators collected the questionnaire booklets and developed a draft report for the review of the Visiting Team members for an average of 10 hours spent developing the report and presentation • 3 of the Coordinators developed the report during 2 to 3 sessions with their Visiting Teams in which case the time spent increased considerably to about 40 hours • 100% of the report-back meetings were held in neutral communities • the Consulting Team member working with the community sourced and often confirmed the venue • the Consulting Team member working with the community often provided the A/V equipment • on average report-back meetings occurred over a 3.5 hour period • all Visiting Teams used the report and presentation templates and all included photos from the exchange in the report and presentation
Council Debrief	<ul style="list-style-type: none"> • 85% of communities used the debriefing template developed by the Consulting Team (some the actual document, while others adapted it to fit their own Council briefing formats) • the FICE Coordinator and/or a member(s) of the Visiting Team were involved in debriefing their Council in the larger communities (78%) and in the smaller communities the Visiting Team also participated in the debriefing of Council
Action Planning	<ul style="list-style-type: none"> • 100% of communities have identified priority action items • 78% of communities have identified individuals to lead the planned action projects • the FICE Coordinator and a member(s) of the Visiting Team was involved in the action planning process in 100% of the communities • 28% of the communities identified their priority items through an open meeting of community members • 72% used community-based organizations such as community panels, economic development boards, etc. to focus their planning and identify their priority items • a member of the Consulting Team facilitated the planning meetings in 4 of the communities • 86% of communities used the action planning template developed by the Consulting Team • communities identified between 1 and 6 priority items for action from the reports • 64% of action plans address challenges related to the downtown • 57% of action plans address signage • 57% of action plans address challenges related to tourism • 35% of action plans address challenges related to business and to commercial land development

B.2 Findings Related to the Perceptions of the Participating Communities

The following chart provides an overview of what participating communities felt about the program.

Table B2: Perceptions of Participating Communities

Theme	Associated Comments
Value to the community	<ul style="list-style-type: none"> • greater awareness and understanding of our own community, an opportunity to celebrate our strengths • enhanced appreciation of what we have in our own community versus what we don't have, not taking what we have for granted • added "weight" to issues already identified because comments and observations came from an objective outside source and opened the door to discussion in other areas • a good way to acquire support from leadership, business community and community organizations for issues and concerns • motivation to begin projects that have been on the backburner in some communities, given the enthusiasm from their teams as a result of the project • new insights, ideas, and information learned from/shared with other communities on ways to manage every-day challenges • appreciation of the challenges and struggles of other communities and a knowledge that we are not alone with those issues • assumptions are made about our communities, including where things are located, so we needed that outside perspective to help us identify that • learning and sharing methods, practices, processes and funding information, and to try things that have been successful for other communities • opportunities for collaboration • generated a renewed community spirit, renewing the interest and efforts to create change • development of camaraderie within the Visiting Team and with the paired community • the FICE action plan fit into the Sustainability plan and clarified areas where we were unsure of the next steps • the support of the Consulting Team was important to our success, and the tools and templates were very helpful
Recommendations / suggestions for the program	<ul style="list-style-type: none"> • interested in revisiting the program in the future to affirm what we've done and what we could still improve upon • support (or a key person) is needed to keep a focus on the project and to assist with some of the activities • allow for a menu for areas communities may want to focus on versus the full blown questionnaire • needed more time in the community, the program should allow for and encourage an overnight stay • additional support in terms of writing the action plan when expertise is not readily available within the community or when it adds an additional burden to a small administrative staff

Theme	Associated Comments
Approaches to the process	<p>communities took various approaches to parts of the FICE process</p> <ul style="list-style-type: none"> • <u>preparing for the Exchange Visit:</u> <ul style="list-style-type: none"> ○ all communities with the exception of one conducted the orientation of the Visiting Team as a group ○ all communities indicated that this was important in terms of ensuring that the Team was well prepared for their role and the expectations around their involvement ○ some communities went as a group in one vehicle and used the time to prepare for the Visit and review the questionnaire while others used two or more vehicles ○ the benefit of using more than one vehicle is the ability to divide into groups to conduct the Visit without having to cover a lot of ground on foot ○ many communities brought with them coolers of water and other beverages, extra pens, maps, cameras, cell phones to ensure regular contact with Team members, pads of paper for jotting down ideas and suggestions, blankets, etc. • <u>conducting the Exchange Visit:</u> <ul style="list-style-type: none"> ○ in some cases the entire Visiting Team worked through the questionnaire and in others the Team broke into teams of 2 or 3 with each team working through specific components of the questionnaire ○ the benefit of the “entire Team” approach is that all components are looked at from a variety of perspectives (e.g. a potential resident may look at education and recreation services and facilities from a different perspective than a student or educator would, and at businesses and downtown areas differently than a business person or chamber manger might) ○ the down side of this approach is that it takes much longer for each member to go through the questionnaire and it may seem overwhelming at times • <u>time spent in the community:</u> <ul style="list-style-type: none"> ○ in three cases communities included an overnight stay in their Exchange Visit ○ while distance dictated an overnight stay in one pairing, the third community chose to overnight and they felt strongly that this gave them an opportunity really do justice to the questionnaire and provide the best information and feedback to their paired community ○ almost all communities echoed this finding and indicated they would have preferred an overnight stay ○ while the downside of the overnight stay is the additional cost of accommodation and meals and finding team members who are willing to give that extra time to the process, in virtually all cases communities indicated that neither of these would be an issue

Theme	Associated Comments
Approaches to the process	<ul style="list-style-type: none"> • <u>developing the report:</u> <ul style="list-style-type: none"> ○ in some communities the Team sat down as a group and worked through their questionnaires and the report template in one or more sessions ○ in many communities, the Coordinator developed the report from the questionnaires and either emailed it to the Visiting Team members for feedback or sat down in one session to review it ○ the downside of the “entire Team” approach is the time commitment ○ questionnaire booklets were collected and shredded by the Consulting Team • <u>identifying priorities for the plan:</u> <ul style="list-style-type: none"> ○ while most communities chose to use a community panel, economic development board, etc. to identify priorities and focus their plans, four communities used a community planning process with a member of the Consulting Team facilitating the session ○ the community process option was often due to policy • <u>action planning:</u> <ul style="list-style-type: none"> ○ in most cases the Coordinators developed the action plan based on the identified priorities ○ in some cases a community-based organization such as the economic development board took on that role ○ some communities were involved with sustainability planning and found that the FICE findings meshed so well with that process that they integrated the FICE actions into the sustainability plan • <u>support:</u> <ul style="list-style-type: none"> ○ some communities accessed the Consulting Team for a significant amount of assistance around the process itself, the Visit, the report development, and action planning ○ support was required to ensure that communities stayed focused and on track in terms of meeting their milestones and completing the program ○ while some communities felt a little “pushed” on this, they all felt that they may not have managed the process and completed the milestones within the timeframe without that support ○ a few communities were very much on track on their own and required little support beyond regular checking in ○ most communities appreciated the opportunity to debrief at specific times during the process, often contacting the Consulting Team to discuss progress, options, etc.

B.3 The Outcomes

This pilot can be deemed “very successful” based on the following outcomes:

- 100% of the communities completed the program
- 100% of participating communities stated that they would recommend the project to other communities

- Visiting Team members stated that they had all learned something about their own communities, that they will look at their own communities in a different way in the future, and that they enjoyed the process
- most of the participating communities indicated that it would be very valuable to repeat the program, with suggestions ranging from annually to every 5 to 7 years
- 100% identified priority items from the reports provided by their matched communities
- 13 communities have completed action plans based on those priority items and the remaining one has identified the key priorities and will develop the action plan in the immediate future
- 78% of communities have identified individuals to lead the planned action projects.

Appendix C:

Summary of the Learnings and Associated Recommendations Resulting from the Alberta Pilot Project

C. LEARNINGS AND ASSOCIATED RECOMMENDATIONS

Many noteworthy learnings resulted from this pilot project arising from several sources:

- Best practices review
- the Alberta FICE process itself
- the Coordinators
- the wrap up community summaries
- the Visiting Team member evaluations.

Table C1: Learnings and Associated Recommendations

Project Learnings	Associated Recommendations
<i>Documents, Forms, Checklists and Templates:</i>	
<p>Coordinators indicated that checklists, guidelines, tools and templates were helpful and that it ensured consistency of content and completion of the project by all communities. The best practices scan indicated that checklists and templates are important.</p>	<ul style="list-style-type: none"> • review tools and templates for simplicity and suitability and adapt as required • incorporate checklists, tools and templates into the Coordinator’s Guide • incorporate a “tip” sheet on ways that some of the pilot communities conducted parts of the process into the Coordinator’s Guide
<p>Flexibility is important in terms of tools used to debrief and update leadership and administration:</p> <ul style="list-style-type: none"> - some communities used the Council debriefing template as is while others incorporated the document with their administrative forms - some communities included the pictures in the actual report while others showed them only in the PowerPoint presentation. 	<ul style="list-style-type: none"> • allow for flexibility when developing guidelines and procedures for the Coordinator’s Guide
<p>Coordinators and Visiting Team members indicated that the questionnaire was long and had some redundancies or inapplicable questions, particularly in smaller communities.</p>	<ul style="list-style-type: none"> • review the questions for possible duplication • note in the Coordinator’s guide that some questions may appear to be duplicated (such as those around entrances, business districts, etc.) but that those questions will be applicable to some of the larger communities
<i>Application and Selection Process:</i>	
<p>The selection process seemed onerous to some of the communities in terms of the length of the application form.</p> <p>The forms associated with the application process for the pilot program will need updating based on the findings.</p>	<ul style="list-style-type: none"> • use completion of the application form as an indication of the commitment of the community to participating in the program as there is an amount of paperwork involved in program itself • update the forms to reflect the findings from the pilot

Project Learnings	Associated Recommendations
Program Participation:	
<p>Communities like to know that other similar communities have experienced success with this program.</p> <p>Observations from the pilot program Coordinators and the best practice scan stressed the importance of a clear statement of expectations and a schedule of events/milestones.</p>	<ul style="list-style-type: none"> • develop a short video made with several of the coordinators offering tips, things to look for, the benefits of FICE, how it impacted their community post FICE, etc. • ensure that a statement of expectations is included in the application form and letter of commitment • develop a list of milestones with associated timelines
Communication:	
<p>On-going communication with Coordinators is critical to the success of the program for each community.</p>	<ul style="list-style-type: none"> • develop a communication strategy that identifies points of contact and sets up opportunities for that contact
Alternates for Coordinators:	
<p>Both the best practice scan and our experience with this pilot indicate that an alternate Coordinator or Co-Coordinator can be critical to the success of the project:</p> <ul style="list-style-type: none"> - communities are hopeful this will be an impetus for more community pride - in 2 communities situations arose where the identified Coordinator could not continue with the project due to family illness or job change - in some communities other projects were given priority status and a Co-Coordinator would have made the job easier. 	<ul style="list-style-type: none"> • add the identification of an alternate coordinator or co-coordinator as a requirement on the letter of commitment and in the application form
Time Spent in the Community:	
<p>Some Coordinators and Visiting Team members felt that they could have used more time in the community especially those involved with the larger communities.</p>	<ul style="list-style-type: none"> • review the time needed for smaller and larger communities • provide options for a one and ½ day overnight visit and include provisos in the application form regarding additional costs for accommodation and meals
Location of Paired Communities:	
<p>Communities in far north or far south locations would often prefer to pair with a community from a more central or populated geographic area and this brings challenges in terms of:</p> <ul style="list-style-type: none"> - driving distance including time of the Visiting Team members and fuel costs - costs for overnight accommodation and meals. 	<ul style="list-style-type: none"> • allot a budget to assist communities who are willing to take on that commute and the associated costs

Project Learnings	Associated Recommendations
Timing of the Program:	
<p>Coordinators indicated that timing became a challenge:</p> <ul style="list-style-type: none"> - summer can be a difficult time to conduct the actual Exchange Visit due to vacation, etc. - although initially the timeframe for completion of the steps required to complete the FICE program appeared do-able, come budget time a number of other projects, activities and requirements diverted attention from the project for some of the communities. 	<ul style="list-style-type: none"> • shore up the timelines to allow for summer vacations and address increased fall workloads • set schedule and milestones to address these issues for example <ul style="list-style-type: none"> ○ April through May – Exchange Visits ○ June – report-back meetings ○ September - planning and implementation • provide an option for paired communities to choose own timelines (include option for timing choices in application form) • modify the application form and commitment letter to include the timelines and milestones
Repeating the Program:	
<p>Coordinators and Visiting Team members indicated that they would like to have an opportunity to repeat the program every 5 to 7 years.</p>	<ul style="list-style-type: none"> • table for review
Learning from Each Other:	
<p>Communities were all able to openly share and gain insights, ideas, and information from one another’s feedback, experience base and knowledge with respect to particular issues which they explained had not happened before.</p>	<ul style="list-style-type: none"> • continue with the community-driven process and develop more opportunities for communities to share and learn
Secret Shopper Approach:	
<p>There were differing perspectives regarding the “Secret Shopper” approach:</p> <ul style="list-style-type: none"> - some visiting team members felt they would have liked to research a couple of days in advance and indicated they could still maintain secrecy but would be more prepared to look at the complexities and details if they had some upfront information - some Coordinators indicated they would have liked an opportunity to talk with economic and/or community development reps from the paired community to get an added perspective around the “whys” of what they had seen. 	<ul style="list-style-type: none"> • the best practice scan suggested that the “secret shopper approach provides the most value to participating communities • there is an opportunity to develop some clearer guidelines around this approach

Project Learnings	Associated Recommendations
<p>Support:</p> <p>Coordinators indicated that support and coaching were very important as was the on-going contact and communication:</p> <ul style="list-style-type: none"> - several communities required support in terms of logistics such as assisting them in keeping on schedule, identifying venues, providing equipment, etc. - several communities wanted assistance with and review of their reports - others appreciated the templates and tools - four communities required facilitation services for their community planning meetings. 	<ul style="list-style-type: none"> • although 3 options are available for support during the program (self-administered with web-based support, combination of in-person and web-based, and fully supported), it is not recommended that a optional approach be taken • the “full support” approach used in the Alberta pilot resulted in a 100% completion rate • the best practice scan suggested that a “full support” approach provides Coordinators with the opportunity to access as much support as they require and goes a long way toward ensuring that the participating communities remain in the program and complete it • some communities required more support than others but the experience with the Alberta pilot suggested that the support time balanced out
<p>Next Steps:</p> <p>Based on the success of the pilot and the feedback from the participating communities, this is a worthwhile program that would provide on-going value to participating communities, to regions, and to the Province.</p>	<ul style="list-style-type: none"> • adapt documents and process based on feedback and recommendations from the pilot project • develop an Advisory Team of users to review same (include one or more individuals who participated in the pilot, a member of the Consulting Team, an ARD and an AUMA representative) • identify how the support will be provided