

AGENDA
Planning, Transportation and
Economic Development Advisory Committee
Saanich Municipal Hall, Committee Room No. 2
Thursday, March 9, 2017 from 4:30 p.m. to 6:30 p.m.

- 1. ADOPTION OF MINUTES** (attachment)
 - Minutes of the meeting held January 12, 2017.
- 2. SINGLE FAMILY RESIDENTIAL UPGRADE PROGRAM- ALTERNATIVE FUNDING PILOT PROJECT**
 - Presentation from Sustainability Manager and Director of Planning
- 3. SHARED ECONOMY-AIR BNB** (attachment)
 - Update from Director of Planning
- 4. RECONSIDERATION OF SHORT TERM RENTAL MOTION NOVEMBER 10, 2016** (attachment)
 - Discussion led by the Chair
- 5. PERFORMANCE MEASURES-SAANICH** (attachments)
 - Discussion led by the Chair
- 6. VICTORIA TOURISM LAUNCH**
 - Update from the Chair

*** Adjournment ***

**** Next meeting April 13, 2017****

Please contact Elizabeth at Elizabeth.Vandenhengel@saanich.ca or
475-5494 (ext. 3502) if you are unable to attend this meeting.

Go Green!
Members are encouraged to bring their own mug to the meeting

MINUTES
PLANNING, TRANSPORTATION AND ECONOMIC DEVELOPMENT ADVISORY COMMITTEE
Held at Saanich Municipal Hall, Committee Room No. 2
January 12, 2017 at 4:30 p.m.

Present: Councillor Judy Brownoff (Chair), Bill Mumford, Stuart Chalmers, Suzanne Bartel, Peter Pokorny, Sophia Baker-French

Staff: Harley Machielse, Director of Engineering; Elizabeth van den Hengel, Committee Clerk

Regrets: Andrea Mercer, Travis Lee

Guests: Christine Culham, Senior Manager Housing, CRD

MINUTES

MOVED by B. Mumford and Seconded by S. Bartel: "That the Minutes of the Planning, Transportation and Economic Development Advisory Committee meeting held November 10, 2016, be adopted."

CARRIED

INTRODUCTIONS

The Chair welcomed Committee members for the 2017 PTED Advisory Committee term.

2017 MEETING SCHEDULE

The PTED Advisory Committee will meet from 4:30-6:30 pm the second Thursday of the month, with no regular meetings schedule for July, August and December 2017.

AFFORDABLE HOUSING AGREEMENTS IN NEW CONSTRUCTION

The Chair introduced Ms. Christina Culham, Senior Manager Housing. Ms. Culham presented the Committee with information on the affordable housing agreements in new construction and the highlights are noted:

- Housing agreements are authorized by section 905 of the Local Government Act.
- A local government may enter into a housing agreement with the land owner to set parameters with respect to the occupancy of the housing units on the land.
- Terms of housing agreements may include:
 - Form of tenure
 - Availability of units to specific income categories
 - Administration and management of housing units
 - Rents, lease, sale or share prices, and the rates of change over time.
- A housing agreement must be adopted by bylaw and may only be amended by bylaw adopted with the consent of the owner.
- Notice of the housing agreement is filed at the land title office and the notice of agreement is registered on title to the land.

Committee discussion occurred and the following was noted:

- Management of properties/units in housing agreements must be carefully considered.

- Guidelines on the number of designated affordable units per multi-family developments should be developed by Saanich.
- Housing agreement timelines are dependent on the individual project.
- Operationalizing housing agreements requires:
 - Clear guidelines and an affordable housing policy in place
 - Allowances for the ongoing administration of the housing agreements
 - Agreements may be altered as necessary
- Saanich has explored inclusionary zoning. Planning should be invited to update the Committee on inclusionary zoning within Saanich.
- Developers may be nervous about management of rental units within occupant owned buildings.

WILKINSON ROAD BRIDGE UPDATE

The Director of Engineering provided the committee with an update on the Wilkinson Road Bridge Project.

TRANSIT SHELTERS

The Director of Engineering provided the committee with an overview of transit shelters in Saanich. The following was noted:

- Saanich has 717 bus stops and 145 bus shelters. Thirty-five transit routes pass through Saanich.
- Saanich is allocated 12 bus shelters per year. Additional bus shelters are able to be constructed in Saanich by utilizing other municipalities unused shelter allocations.
- "Street" furniture is being constructed using recycled materials.

ADJOURNMENT

The meeting adjourned at 5:55 p.m. The next meeting is Thursday, February 9, 2017.

Councillor Brownoff, Chair

I hereby certify these Minutes are accurate.

Committee Secretary

TOURISM VICTORIA

Marketing our favourite destination

Paul Nursey
President & CEO
Tourism Victoria
200-737 Yates St
Victoria, British Columbia
Canada V8W 1L6

February 14th, 2017

Lindsay Milburn
Senior Planner – Housing Policy
Sustainable Planning and Community Development
City of Victoria
1 Centennial Square, Victoria BC V8W 1P6

Re: BC Hotel Association efforts to Solicit Letters to the Provincial Government

Dear Patricia,

Thank you for the opportunity to submit an intervention on the proposed letter from the City of Victoria to the Province of British Columbia requesting a repeal of Section 78(1)(b) of the Provincial Sales Tax exemption and refund regulation, which exempts tourism accommodation with four or fewer units from paying provincial sales tax. Specifically you have asked for input on the following motion:

Motion to refer to the February 16, 2016 Committee of the Whole meeting and invite comment from the BnB Association, the Hotel Association and other operator, industry representatives that want to provide comment:

That the City write to the province asking there be a repeal of Section 78(1)(b) of the Provincial Sales Tax exemption and refund regulation

Tourism Victoria's Destination Development and Transportation Committee and Board of Directors discussed short term vacation rentals along with Air BnB "Experiences" as an agenda item at our regularly scheduled quarterly meetings on February 8th and February 10th, 2017 respectively. The outcomes of the meeting were as follows:

The Tourism industry in Greater Victoria is deeply concerned about the proliferation of short term vacation rentals and the move by short term vacation rental platform providers into the experiential tourism economy of sightseeing, tours etc. for the following reasons:

1. **Customer Safety:** Both commercial accommodation and tours, transportation and experiences are highly regulated by a variety of bodies such as Worksafe BC, Consumer Protection BC, Transport Canada etc. Having technology platform companies encourage private citizens to share homes, engage in private tours etc. can seriously compromise customer safety and the very strong efforts of the mainstream tourism industry to ensure that the industry is safe for guests.
2. **Community Disruption and Unsavoury Behaviour:** We have heard from various strata councils and residents' associations about the general chaos that the proliferation of short term vacation rentals has caused residents. With the recent Victoria Adams white paper which states that there

TOURISM VICTORIA

Marketing our favourite destination

are over 1,800 Short Term Vacation rentals operating in Greater Victoria, we now have empirical evidence of the chaos in the housing system that I referenced in my previous submission to Victoria City Council. Moreover, commercial accommodation providers work closely with law enforcement to ensure that laws are upheld and there is close communication with authorities. Any hotelier will tell you that they have “seen it all”. At our committee and board tables, hoteliers have shared their experiences in working with police to stamp out the tragedy of human trafficking. What measures are in place to ensure that this kind of unsavoury behaviour is not taking place with short term vacation rentals and that any issues are prevented in real time as they are in commercial accommodation?

3. **One Owner Owning Multiple Units:** This is what is known in the industry as “shadow hotels” whereby a real estate investor will operate multiple short term vacation rental units. We know first-hand that in Victoria that we have several “shadow hotels” operated by real estate investors. The seminal work by community activist Murray Cox of “Inside Air BnB” demonstrated conclusively that AirBnB was being misleading with its statistics with officials and not sharing damaging data which demonstrated that the vast majority of its short term vacation rentals were in fact “shadow hotels”¹. This untaxed competition is very damaging commercially to the accommodation sector.
4. **Effects on Housing Supply:** Our industry is having a more difficulty finding appropriate homes for our workers. As a constructive member of the economy, the Tourism Industry is very concerned about the impact of unregulated and untaxed short term vacation rentals on the housing supply which should be focused on being homes for citizens of our community.

The request to write letters to the Provincial Government to rescind Section 78 (1)(b) is a direct response to a discussion and exchange of views at the UBCM Conference in September hosted in Victoria. As part of the discussion, a representative from Air bnb explained that they have no opposition to paying legislated tax on accommodation and pointed to their record of negotiating taxation schemes with over 200 jurisdictions. The representative then further stated, fairly casually, that because of the BC Regulation around four rooms (Section 78(1)(b)), British Columbia communities were essentially out of luck because the majority of their hosts had less than four rooms.

The four room threshold was created a long time ago to ensure that small, seasonal, traditional, and mainstream bed and breakfasts did not have the same paper burden for a lifestyle operation. While we are very sympathetic to small operators we feel that the weight of the other issues caused by Short Term Vacation Rentals powered by global technology companies necessitates the need to start on the process of “levelling the playing field.” For that reason, Tourism Victoria is in favour of and strongly encourages the City of Victoria to write a letter asking for a repeal of Section 78 (1)(b). More broadly we will encourage all levels of government to look at jurisdictions where all rooms rented as transient vacation accommodation are taxed equally as best practices.

This letter from the City of Victoria is an important first step. However, much more needs to be done at all three levels of government. The development of online scraping tools, combined with citizen housing activists, academics, and data scientists are allowing for much more transparency with regards to the scope of the issue. Simply put, it has become a massive issue in terms of its scope. Revenues from regulation and taxation can be re-invested into regulation along with other uses such as destination marketing or other priorities. While it is unlikely that this regulation will be actioned by the Provincial

¹ **A Lone Data Whiz Is Fighting Airbnb—and Winning**

The “Inside Airbnb” project has earned the home-sharing company a deluge of bad press and forced it to be more transparent. Miranda Katz, BackChannel. February 10, 2017

TOURISM VICTORIA

Marketing our favourite destination

Government prior to the coming election in May, officials will still be working on transition binders for a new government and therefore it is good timing to communicate on the matter.

More broadly, as the outcome of our meetings last week, the Greater Victoria tourism industry, under the leadership of Starr McMichael, Chair of the Tourism Victoria Transportation and Destination Management Committee, will be convening meetings locally to include regulators, particularly those that regulate both accommodation and experiences/transportation/tour products, and other interested parties such as Worksafe BC, Consumer Protection BC, taxation bodies, and officials from all levels of government, to further discuss and hopefully find solutions around the sharing economy which is in fact currently behaving like a grey economy in British Columbia. We intend to encourage bodies such as the Tourism Industry of British Columbia to do the same.

Victoria is global tourism destination; what happens here matters a great deal. It is also our home. The mainstream tourism industry happily contributes to society with a myriad of taxes, and complies with all safety and regulatory regimes along with giving back meaningfully to the community. It is important to start to wrap our arms around this issue. This letter would be a good start.

Sincerely,

Paul Nursey
President & CEO

CC – Bill Lewis, Chair, Board of Directors
Starr McMichael, Chair, Transportation and Destination Management Committee
Jim Humphrey, Chair of the Tourism Industry Association of British Columbia
Walt Judas, President & CEO of the Tourism Industry Association of British Columbia
James Chase, President & CEO of the BC Hotel Association

Committee discussion continued onto the issue of short term rentals in Saanich and the following was noted:

- Currently there is no regulation or policy in place at Saanich to address growing short-term rental activity in Saanich.
- Short-term rentals do impact neighbourhoods with issues such as parking.

MOTION: **Moved by T. Lee and Seconded by J. Schmuck: “That the Planning, Transportation and Economic Development Advisory Committee requests that Council ask staff to study and review the management of short-term rentals within Saanich.”**

DRAFT

Key Performance Indicators – Saanich Strategic Indicators

Since 2003, Saanich has used key performance indicators to monitor and measure strategic performance toward achieving the goals of the Strategic Plan. The indicators provide a framework for accountability established in the Strategic Plan that is used to report progress against in the Annual Report. Indicators can provide trends over time that rely on the initial baseline data plus two additional measurement periods to establish a trend. 77 indicators of 3 types are used by Saanich:

- Long-range indicators measure broad outcomes. Targets are reviewed and progress reported every five years. Saanich currently uses 10 long-range indicators. Targets and baselines were established in the 2012-2016 Strategic Plan. Progress on long-range indicators was last reported in the 2015 Annual Report published in June, 2016. The next report on long-range indicator progress is for 2017 to be published in June, 2019.
- Mid-range indicators help to identify important trends over time. Targets are reviewed and progress reported every two years. Saanich currently uses 22 mid-range indicators. Baselines were established in 2006 and targets were last updated in the 2012-2016 Strategic Plan. Progress on mid-range indicators was last reported in the 2015 Annual Report published in June, 2016. The next report on mid-range indicator progress is for 2017 to be published in June, 2019.
- Annual indicators focus on short term targets established in the Strategic Plan each year and measured in the Annual Report. Saanich currently uses 22 annual indicators. Progress on annual indicators was last reported in the 2015 Annual Report published in June, 2016. The next report on annual indicator progress is for 2016 to be published in June, 2017.

The Indicator Cycle is based on the following model:

1. Describe the indicator for the desired future state – what is the target and how will it be measured?
2. Define the criteria and timeline that will be used to measure results and collect the data during the decided timeline to establish a baseline. A baseline is a measured result that is used as a logical basis for comparison. A baseline is the first point on a trend line.
3. Report progress by comparing actual results to the target to determine if progress is being made.
4. Measure actual results for 2 more cycles to capture the trend. A cycle can be as brief as one year for annual indicators or span up to 6 years for some long-range indicators.

Summary of Indicators in 2015-2018 Strategic Plan

Community and Corporate Themes	Indicator Type	#	Next Report Year	Indicator Type	#	Next Report Year	Indicator Type	#
Environmental Integrity	Long-range	12	2017					
Sustainable Environment				Mid-range	2	2015	Annual	4
Balanced Transportation				Mid-range	3	2015	Annual	5
Social Well-Being	Long-range	14	2017					
Healthy Community				Mid-range	7	2015	Annual	4
Safe Community				Mid-range	3	2015	Annual	5
Economic Vibrancy	Long-range	8	2017					
Vibrant, Connected Economy				Mid-range	3	2015	Annual	3
Service Excellence				Mid-range	4	2015	Annual	1
Totals	Long-range	34		Mid-range	22		Annual	22

Annual Indicators: Annual indicators focus on short term targets established in the Strategic Plan and are measured in the Annual Progress Report

Mid-Range Indicators: Progress on mid-range indicators was last reported in the 2015 Annual Report and will be reported on in the 2018 report due in June 2016

Long-Range Indicators: Progress on long-range OCP indicators was last reported in the 2012 Annual Report. The next report for 2017 is due in June 2017

Long-range Official Community Plan (OCP) Indicators for Community Themes

These indicators were selected in 2012 to measure broad outcomes that encourage the attainment of long-range targets by aligned to the key policy areas of the Official Community Plan last updated in 2008. Baselines were established in 2012 using long-range indicators is published by various sources and publication dates range from annual to every 6 years. As an example, data collected during the 2006 Census, published data was not available until 2012. Progress toward each OCP indicator is reported using the latest available data. Reporting years for the long-range indicators are 2017, 2022, 2027, 2032 and 2037. Where annual data is not available in 2017. Where data is only available every five years, initial trend lines will not be available until 2027.

Long-range indicators (Next Reporting Year is 2017)	Source of Data	Frequency of Data	Department Responsible	Baseline Year	Baseline Data	Data Year	Latest Data	2036 Target	
ENVIRONMENTAL INTEGRITY COMMUNITY THEME									
Climate Change									
Greenhouse gas (GHG) emissions: Tonnes of carbon dioxide equivalent units (CO ₂ equivalents) per year - Municipal operations	Saanich	Annually	Planning	2007	5,446 tonnes	2015	4,713	60% reduction to 2,178 tonnes	Baseline 2,178 tonnes
Greenhouse gas (GHG) emissions: Tonnes of carbon dioxide equivalent units (CO ₂ equivalents) per year - Community wide	Province BC	Every 3 years	Planning	2007	440,832 tonnes	2010	409,241	60% reduction to 176,333 tonnes	Baseline 200,000 tonnes (60% reduction) http://climateactionreport.ca
Climate adaptation Storm events - number of residences at risk of flooding (salt or fresh water) during a major storm event	Saanich	Annually	Planning	2012	400	2015	400	No residences at risk	Planning
Urban forest coverage - percentage of total land cover	Saanich	Every 5 years	Parks and Recreation	2009	37.8%	2009	37.8	≥ 37.8%	Parliamentary Coverage http://meritpro.wp.com
Mobility									
Modal share – percentage of commuters travelling by: Automobile as a driver	CRD – Origin /Destination Survey	Every 5 years	Engineering	2011	68%	2011	68%	≤ 50%	http://source.odotail.com

Saanich Strategic Indicators

Revised: June 15, 2016

Item #5.1

Long-range indicators (Next Reporting Year is 2017)	Source of Data	Frequency of Data	Department Responsible	Baseline Year	Baseline Data	Data Year	Latest Data	2036 Target	
Modal share – percentage of commuters travelling by: Automobile as a passenger	CRD – Origin /Destination Survey	Every 5 years	Engineering	2011	13%	2011	13%	≥ 20%	http://source-sdaily
Modal share – percentage of commuters travelling by: Transit	CRD – Origin /Destination Survey	Every 5 years	Engineering	2011	7%	2011	7%	≥ 12%	http://source-sdaily
Modal share – percentage of commuters travelling by: Bicycle	CRD – Origin /Destination Survey	Every 5 years	Engineering	2011	4%	2011	4%	≥ 8%	http://source-sdaily
Modal share – percentage of commuters travelling by: Walking	CRD – Origin /Destination Survey	Every 5 years	Engineering	2011	7%	2011	7%	≥ 10%	http://source-sdaily
Modal share – percentage of commuters travelling by: Other (School bus, Handy Dart, other bus, taxi, any other mode)	CRD – Origin /Destination Survey	Every 5 years	Engineering	2011	1%	2011	1%	-	http://source-sdaily
Ratio of kilometres of roads to trails, bike lanes and sidewalks	Saanich	Annually	Engineering	2012	1.2:1	2015	1.34:1	1.3:1 (requires additional 150 km of trails, bike lanes, or sidewalks)	Engi
Growth Management									
Percentage of citizens living inside "Centres" and "Villages" (assumption: 75% of new residents will live inside centres and villages)	Saanich	Every 5 years	Planning	2012	53.8%	2015	55.6%	≥ 55.6% (0.09% per year, over 24 years)	Plan
Parks, natural areas and open spaces as a percentage of the total land area in the municipality	Saanich	Annually	Planning	2011	26.8%	2015	26.8%	≥ 28% (0.05% per year, over 24 years)	Plan

Long-range indicators (Next Reporting Year is 2017)	Source of Data	Frequency of Data	Department Responsible	Data Year	Latest Data	2036 Target	Calculation
SOCIAL WELL-BEING COMMUNITY THEME							
Food Security							
Land used for agriculture - Taxable commercial farmland	Saanich	Annually	Finance	2011	2,222 hectares	≥ 2,335 hectares (increase by 1% every 5 years)	Finance data
Land used for agriculture – Backyard vegetable garden or poultry keeping	Saanich Citizen Survey	Every 3 to 4 years since 2012	Legislative Services	2015	42% of residents	99% of residents (Increase by 66%)	Survey question #19: "Do you have 1. Yes – Vegetable garden 2. Yes – Poultry 3. No http://saanich.ca/living/pdf/Saanich%202015.pdf
Land used for agriculture – Community gardens	Saanich	Annually	Planning	2015	3	≥ 12	Planning data
Community Participation / Vitality							
Percentage of citizens who agree that Saanich welcomes citizen involvement	Saanich Citizen Survey	Every 3 to 4 years since 2003	Legislative Services	2015	79%	≥ 85%	Survey question # 17 a.: "Saanich On a scale of 1 (strongly disagree) to 5 (strongly agree) http://saanich.ca/living/pdf/Saanich%202015.pdf
Percentage of citizens who rate the quality of life in Saanich as good or very good	Saanich Citizen Survey	Every 3 to 4 years since 2003	Legislative Services	2015	99%	≥ 95%	Survey question #1: "How would you rate the quality of life in Saanich?" On a scale of 1 (very poor) to 4 (very good) http://saanich.ca/living/pdf/Saanich%202015.pdf
Housing							
30% or more of family income required for housing: Percentage of renters	Statistics Canada Census	Every 5 years 2006, 2011	Legislative Services	2011	44.5%	≤ 35%	http://www12.statcan.gc.ca/nhs-eng.cfm?LANG=E&APATH=5&DEPT=5&GID=0&GK=3&GRP=0&PID=107&L=0&SUB=0&Temporal=2013&TH=1
30% or more of family income required for housing: Percentage of owners	Statistics Canada Census	Every 5 years 2006, 2011	Legislative Services	2011	19.5%	≤ 15%	http://www12.statcan.gc.ca/nhs-eng.cfm?LANG=E&APATH=5&DEPT=5&GID=0&GK=3&GRP=0&PID=107&L=0&SUB=0&Temporal=2013&TH=1
Number of people on regional wait list for supportive housing	BC Housing Victoria Coalition to end Homeless- ness	Annual	Planning	2015	1,502	0 by the year 2018	Data from two sources: 1. Victoria Coalition to end Homelessness http://victoriahomelessness.ca 2. BC Housing Performance Report http://www.bchousing.org/at

Saanich Strategic Indicators
Revised: June 15, 2016

Item #5.1

Long-range indicators (Next Reporting Year is 2017)	Source of Data	Frequency of Data	Department Responsible	Data Year	Latest Data	2036 Target	Calculat
Public Safety							
Municipal crime rate (number of incidents per 1,000 residents)	Saanich	Annually	Police	2014	36	< 51 incidents per 1,000	Saanich Police data
Percentage of citizens who agree that Saanich neighbourhoods are safe	Saanich Citizen Survey	Every 3 to 4 years since 2003	Legislative Services	2015	96%	≥ 97%	Survey question #3 a.: "Please tell opinion for each of the following - On a scale of 1 (very unsafe) to 4 (http://saanich.ca/living/pdf/Saani%202015.pdf)
Percentage of households prepared for a 7 day emergency disaster event	Saanich Citizen Survey	Every 3 to 4 years since 2012	Legislative Services	2015	40%	≥ 60% by 2018 ≥ 90% by 2036	Survey question #21: "In the even your household prepared to take c (food, water, first aid, warm clothi 1,2,3,4,5,6,7+ http://saanich.ca/living/pdf/Saani%202015.pdf
Percentage of fire department emergency incident responses within 8 minutes	Saanich	Annually	Fire	2015	91%	≥ 90%	Saanich Fire data
Critical infrastructure assessment	Saanich	Annually	Finance	2006	C-	≥ B	Staff assessment committee

Long-range indicators (Next Reporting Year is 2017)	Source of Data	Frequency of Data	Department Responsible	Data Year	Latest Data	2036 Target	Calculation / Notes
ECONOMIC VIBRANCY COMMUNITY THEME							
Community Infrastructure							
Infrastructure gap with condition assessment: Annual infrastructure gap calculated from current 5-yr Financial Plan	Saanich	Annually	Finance	2015	\$6.26 million	\$6 million by the year 2016 and no infrastructure gap by the year 2019	Infrastructure gap is the difference between the value of infrastructure assets at the end of the year and the budgeted for that purpose
Infrastructure gap with condition assessment: Condition assessment by letter grade	Saanich	Every 5 years	Finance	2012	C	≥ B	Staff assessment committee
Percentage of citizens who are satisfied with the quality of public services provided by Saanich	Saanich Citizen Survey	Every 3 to 4 years since 2003	Legislative Services	2015	85% satisfied or very satisfied	≥ 85% satisfied or very satisfied	Survey question #6: "I'm going to District of Saanich. Please tell me how satisfied you are with the quality of public services provided by Saanich." On a scale of 1 (not at all satisfied) to 4 (very satisfied). http://saanich.ca/living/pdf/Saanich%202015.pdf
Percentage of businesses who are satisfied with the services provided by Saanich	Saanich Business Survey	Every 3 to 6 years 2003, 2006, 2012	Legislative Services	2015	93% good or very good	≥ 93% good or very good	Survey question #1b.: "How would you rate the services provided by Saanich?" On a scale of 1 (very poor) to 4 (very good). http://www.saanich.ca/living/pdf/Findings%202015.pdf
Long-range Financial Sustainability							
Municipal debt servicing per capita	Saanich	Annually	Finance	2015	\$21	≤ \$109	Municipal debt per capita target is set by Council policy
Diversified revenue portfolio – Percentage of revenue generated from property tax source	Saanich	Annually	Finance	2015	44%	≤ 55%	Finance data
Diversified Economic Base							
Employment by industry index	Conference Board of Canada	Annually	Finance	2012	.71	≥ .75	The calculation used is the "Hachinaka Index" which measures the ratio of the Capital Region's economy to the national economy. The score can range from 0 to 1 – the higher the score, the more diversified the economy.
Percentage of commercial, industrial and institutional area to residential property area in Saanich	Saanich	Annually	Planning	2012	23.8%	≥ 25%	Planning data

Saanich Strategic Indicators
Revised: June 15, 2016

Item #5.1

Mid-range Indicators for Corporate Themes

These indicators were selected to help identify important trends over time. Baselines were established using the latest data available. Baselines were established every 3 to 4 years. Data for mid-range indicators is published by various sources and publication dates range from 2006 to 2015. For example, for some indicators that rely on data collected in the Saanich Citizen Survey, published data is available every 3 to 4 years. For other indicators, data is reported every 3 to 4 years, using the latest available data. The reporting years for current mid-range indicators are 2006 to 2015. Data for these indicators was published in the Annual Report for the applicable year and trend lines will be published with the 2016 Annual Report due in June, 2017.

Mid-range indicators (Next Reporting Year is 2015)	Source of Data	Frequency of data	Department Responsible	Baseline Year	Baseline Data	2012 Actual Data	2015 Actual Data	2015 Target
Sustainable Environment Corporate Theme								
Number of additional multi-family units required per year to meet the CRD 2026 Regional Growth Strategy (RGS) target	Saanich	Annual	Planning	2006	487	220	526	≥ 441
Number of hectares in Saanich within the Agricultural Land Reserve (ALR)	Saanich	Annual	Planning	2006	1,872	1,872	1,872	≥ 1,872
Balanced Transportation Corporate Theme								
Average daily automobile traffic volume on key routes in Saanich	Saanich	Annual	Engineering	2006	138,150	140,000	135,400	≤ 134,000
Daily ridership on major Saanich routes	Saanich	Annual	Engineering	2009	45,900	43,900	47,500	≥ 48,000
Healthy Community Corporate Theme								
Percentage of citizens who participated in physical activity 3 or more days per week	Saanich Citizen Survey	Every 3 to 4 years since 2003	Legislative Services	2006	61%	62%	82%	≥ 82%

Saanich Strategic Indicators
Revised: June 15, 2016

Mid-range indicators (Next Reporting Year is 2015)	Source of Data	Frequency of data	Department Responsible	Baseline Year	Baseline Data	2012 Actual Data	2015 Actual Data	2015 Target
Shelter bed use by unique individuals in Greater Victoria	Greater Victoria Coalition to end Homeless- ness	Annually	Planning	2009	1,943	1,615	1,725	0 by the y 2018
Percentage of citizens that spend 1 to 5 hours per week in activities or events involving : Arts	Saanich Citizen Survey	Every 3 to 4 years since 2015	Legislative Services	2015	41%	-	41%	≥ 40%
Percentage of citizens that spend 1 to 5 hours per week in activities or events involving Cultural	Saanich Citizen Survey	Every 3 to 4 years since 2015	Legislative Services	2015	31%	-	31%	≥ 25%
Percentage of citizens that spend 1 to 5 hours per week in activities or events involving: Heritage	Saanich Citizen Survey	Every 3 to 4 years	Legislative Services	2015	9%	-	9%	≥ 5%
Percentage of citizens that spend 1 to 5 hours per week in activities or events involving: Social or recreational	Saanich Citizen Survey	Every 3 to 4 years	Legislative Services	2015	51%	-	51%	≥ 50%
Percentage of supportive housing units in Saanich in "Centres" and "Villages"	Saanich	Every 3 years	Planning	2012	12.5%	12.2%	11.1%	≥ 14%

Saanich Strategic Indicators

Revised: June 15, 2016

Item #5.1

Mid-range indicators (Next Reporting Year is 2015)	Source of Data	Frequency of data	Department Responsible	Baseline Year	Baseline Data	2012 Actual Data	2015 Actual Data	2015 Target
Safe Community Corporate Theme								
Percentage of citizens who are satisfied with police services	Saanich Citizen Survey	Every 3 to 4 years since 2003	Legislative Services	2006	95%	94%	97%	≥ 95%
Percentage of citizens who are satisfied with fire services	Saanich Citizen Survey	Every 3 to 4 years since 2003	Legislative Services	2006	99%	97%	99%	≥ 99%
Percentage of citizens who agree that roads in Saanich are safe	Saanich Citizen Survey	Every 3 years since 2003	Legislative Services	2006	99%	85%	91%	≥ 90%
Vibrant, Connected Economy Corporate Theme								
Percentage of Saanich residents with post-secondary education	Statistics Canada Census	Every 5 years 2006, 2011	Legislative Services	2006	57%	60.5%	60.5%	≥ 60%
Saanich median family income compared to provincial rates	Statistics Canada	Every 5 years 2006, 2011	Legislative Services	2006	\$74,433 : 65,787 (2006)	\$85,402 : 75,797 (2011)	N/A	≥ 75,79
Average annual capital infrastructure replacement funding	Saanich	Annual	Finance	2006	\$10,859,200	\$24,396,000	\$32,219,700	≥ \$28,000,

Saanich Strategic Indicators

Revised: June 15, 2016

Item #5.1

Mid-range indicators (Next Reporting Year is 2015)	Source of Data	Frequency of data	Department Responsible	Baseline Year	Baseline Data	2012 Actual Data	2015 Actual Data	2015 Target
Service Excellence Corporate Theme								
Percentage of citizens who agree that in general Saanich government is doing a good job	Saanich Citizen Survey	Every 3 to 4 years since 2003	Legislative Services	2006	92%	89%	86%	≥ 89%
Percentage of citizens who agree that they receive good value for the municipal taxes they pay	Saanich Citizen Survey	Every 3 to 4 years since 2003	Legislative Services	2006	84%	86%	89%	≥ 86%
Percentage of citizens who agree that they recently received good service from Saanich staff	Saanich Citizen Survey	Every 3 to 4 years since 2003	Legislative Services	2006	91%	88%	91%	≥ 90%
Percentage of citizens that are satisfied with the municipal website	Saanich Citizen Survey	Every 3 years since 2003	Legislative Services	2006	92%	96%	96%	≥ 96%

Saanich Strategic Indicators
Revised: June 15, 2016

Item #5.1

Annual Indicators for Corporate Themes

These indicators were selected from 2003 to 2006 to help focus on short term targets. Each indicator is aligned to one or more theme area in the Strategic Plan. Updated baselines were last established using the latest data available in 2011. Targets are annual indicators is published by various sources and publication dates range from annual to every 2 years. As an example, for data collected from BC Transit, the published data does not always coincide with the publication of the Annual Report. Progress is updated every year, using the latest available data. Historical data for these indicators was published in the Annual Report for the applicable year published with the 2014 results in the Annual Report due in June, 2015.

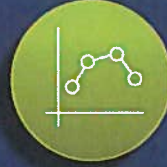
Annual indicators (Next Reporting Year is 2016)	Source of Data	Frequency of data	Department Responsible	Baseline Year	Baseline Data	2015 Actual Data	2015 Target	Calcu
Sustainable Environment Corporate Theme								
Residential garbage cart collection per year (tonnes)	Saanich	Annually	Engineering	2013	11,932	8,286	≤ 8,832	Tonnes of resid is obtained from
Residential organics cart collection per year (tonnes)	Saanich	Annually	Engineering	2014	5,951	8,490	≥ 8,000	Tonnes of resid carts is obtained
Litres of potable water consumed (average per resident/per day)	Saanich / Statistics Canada	Annually	Finance	2012	264.2	249.0	≤ 260	Water consumption data: http://www12.slc.ca/pdf/prof/details/17021&Geo2=(Saanich)&Search=&TABID=1
Number of properties located in Saanich that qualify for farm tax status	Saanich	Annually	Finance	2013	406	406	≥ 406	Finance data
Balanced Transportation Corporate Theme								
Additional bus stop shelters	Saanich	Annually	Engineering	2012	14	10	≥ 15	Engineering data
Bus stop improvements (excluding shelters)	Saanich	Annually	Engineering	2012	16	28	≥ 20	Engineering data
new bike lanes (km)	Saanich	Annually	Engineering	2012	5.3 km	7.3 km	≥ 3 km	Engineering data. Although the cost is relatively consistent, infrastructure costs are varying considerably due to grants and other
New sidewalks (km)	Saanich	Annually	Engineering	2012	2.7 km	5.7 km	≥ 3 km	Engineering data. Although the cost is relatively consistent, infrastructure costs are varying considerably due to grants and other

Saanich Strategic Indicators

Revised: June 15, 2016

Item #5.1

Annual indicators (Next Reporting Year is 2016)	Source of Data	Frequency of data	Department Responsible	Baseline Year	Baseline Data	2015 Actual Data	2015 Target	Calcu
New curb ramps	Saanich	Annually	Engineering	2012	33	100	≥ 25	Engineering da
Healthy Community Corporate Theme								
Saanich social and affordable housing units	BC Housing	Annually	Planning	2012	5,647	5,658	≥ 5,925	Planning obtain affordable hou
Percentage of properties within 500 metres of multiple bus routes	BC Transit	Annually	Planning	2012	76.5%	Data unavailable	≥ 85%	Planning obtain calculations
Percentage of properties within 500 metres of zoned parks	Saanich	Annually	Planning	2012	97.5%	97.8%	≥ 99%	Planning data
Percentage of dwellings within 500 metres of a "Centre" or "Village"	Saanich	Annually	Planning	2012	56.9%	58.6%	≥ 60%	Planning data
Safe Community Corporate Theme								
Break and enter rate (number per year)	Saanich	Annually	Police	2012	352	326	< 350	http://www.saanich.ca/information/cr
Vehicle collisions involving a pedestrian (number per year)	Saanich	Annually	Police	2012	53	48	< 52	http://www.saanich.ca/information/cr
Vehicle collisions involving a bicycle (number per year)	Saanich	Annually	Police	2012	67	86	< 65	http://www.saanich.ca/information/cr
Vehicle collisions involving only vehicles (number per year)	Saanich	Annually	Police	2012	1,271	1,128	< 1,219	http://www.saanich.ca/information/cr
Number of citizens attending Neighbourhood Emergency Preparedness Presentations	Saanich	Annually	Fire	2012	1,907	2,008	≥ 2,113	Fire data
Vibrant, Connected Economy Corporate Theme								
Percentage of business generated property tax revenue	Saanich	Annually	Finance	2012	21.0%	22.7%	≥ 23%	Finance data
Value of commercial and industrial building permits approved	Saanich	Annually	Planning	2012	\$36,348,000	\$51,924,000	≥ \$30,000,000	Planning data
Business licences issued	Saanich	Annually	Finance	2012	4,776	4,508	≥ 4,750	Finance data
Service Excellence Corporate Theme								
Percentage of recreation course registrations processed via website (online/total)	Saanich	Annually	Parks and Recreation	2012	24.5%	27%	≥ 25%	Parks and Recreation online divided by 2011 data: 13,



Tracking Economic Development in B.C. Communities Performance Measurement Toolkit

Version 1.0

April, 2016

Economic Development Division

Ministry of Jobs, Tourism and Skills Training

If you need assistance or support, please contact economicdevelopment@gov.bc.ca. This project is continually evolving: we always welcome any feedback or suggestions for improvement.

400-552



About

Welcome to the performance measurement toolkit for economic development in B.C. communities. The various resources, learning modules and templates in this toolkit are designed to assist local government staff or economic development practitioners in tracking and reporting on economic development-related projects and programs. It is meant to offer all communities guidance, regardless of capacity, resources or size. Drawing upon any aspect of performance measurement will help to more clearly demonstrate the value, progress and future potential of local economic development work in your community.

How to Use

While many may find it useful to go through the sections and exercises sequentially to get a performance measurement plan up and running, feel free to access the components that make sense for your needs. The **Indicator Library**, for example, may have what you need to get a few measures in place. The **Reporting** section contains templates and a graphic image library to allow for simple, drag-and-drop creation of basic infographics or enhancing existing reports. Or, start at the beginning with visualizing your program to establish a solid foundation for your performance measurement approach. The amount of time required to go through the process will vary significantly depending on your needs. Feel free to explore and scale as you see fit.

Format

This toolkit consists of several different components, all of which can be downloaded from the Province's [Economic Development website](#).

Guide: Available in Prezi format or in this pdf, the guide provides an orientation to performance measurement and walks users through the different sections and exercises.

Workbook: The workbook consists of a series of exercises to establish a performance measurement workplan, including a B.C.-specific library of indicators.

Templates: There are several templates available for reporting, including fillable dashboard examples.

Fictional Communities: Two fictional example communities feature a number of downloadable examples (including follow-along workbooks).

Image Library: A zip file containing images and icons that may be useful in your reporting is available for download.



Acknowledgements

The Economic Development Division would like to acknowledge all of those who shared their experiences and provided input onto this toolkit; capturing the B.C.-specific context was the primary goal of this resource.

We would also like to extend sincere thanks to the Economic Development Programs Unit within Ontario Ministry of Agriculture, Food and Rural Affairs, both for their guidance in our own process as well as sharing (and allowing us to take excerpts from) their *Measuring Up! Performance Measurement for Economic Development* guidebook.

We also drew inspiration and examples from the 2011 Economic Developers Association of Canada guide *Performance Measurement in Economic Development*, as well as *Making it Count: Metrics for High Performing EDOs* published by the International Economic Development Council in 2014. A complete reference list is available at the end of this guide.

Finally, we would like to thank Randy Sunderman of Peak Solutions Consulting Inc. and Steve Nicol of Lions Gate Consulting Inc., whose expertise helped bring this toolkit to life.



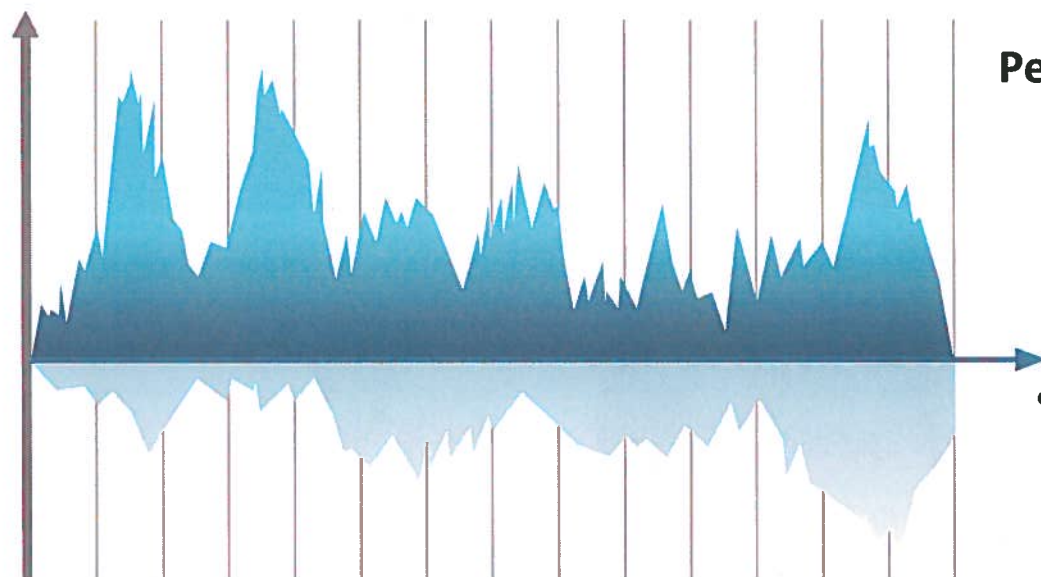
Contents

1. Introduction	5
2. About You.....	10
3. Visualizing Your Path.....	13
4. Choosing Indicators.....	19
5. Measurement Approach	25
6. Communicating Results	31



1. Introduction

What is performance measurement?



Performance measurement
is a systematic approach used

- to assess the efficiency and effectiveness of projects, programs and initiatives
- to monitor how 'on track' you are in achieving your desired goals and objectives

Does this sound familiar?

Common barriers to economic development performance measurement in B.C. include:

01020304



**No Time
No Resources**

Planning, tracking and reporting can seem daunting to many communities



Can't measure

Level of attribution, shifting roles and relationships can make measuring outcomes challenging



Reluctant to measure

Elected officials, boards or EDOs themselves may be reluctant to measure progress for a variety of reasons



**No Culture
No Incentives**

Haven't done it before and no pressing need to do now

Despite these barriers, it is a good idea to have some sort of performance measurement process in place. Why?

It ensures that time is being spent on **high-value activities**

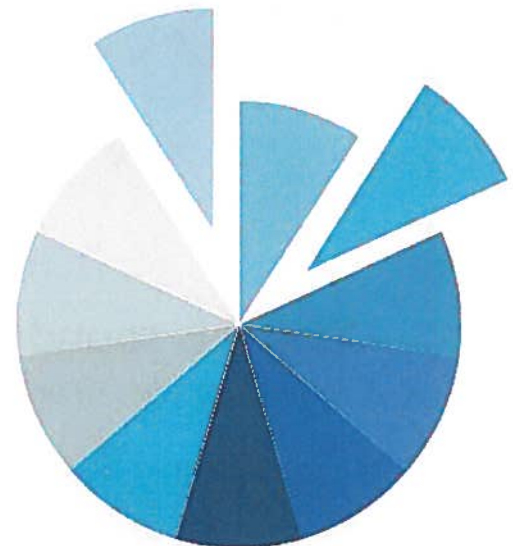
It allows you to **assess the effectiveness** of your strategy and gain insight in order to hone and **improve your approach**

It is a good way to **demonstrate and communicate success** and progress

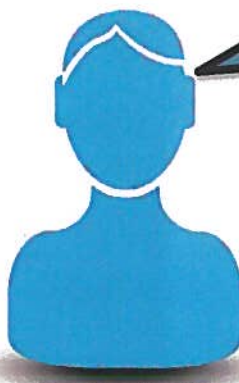
It is a way to **stay accountable** and on target to funders and overseers

It supports **informed and evidence-based decision-making**

It helps to **tell the story** in order to build momentum and buy-in among stakeholders



Essentially, it allows you to say:



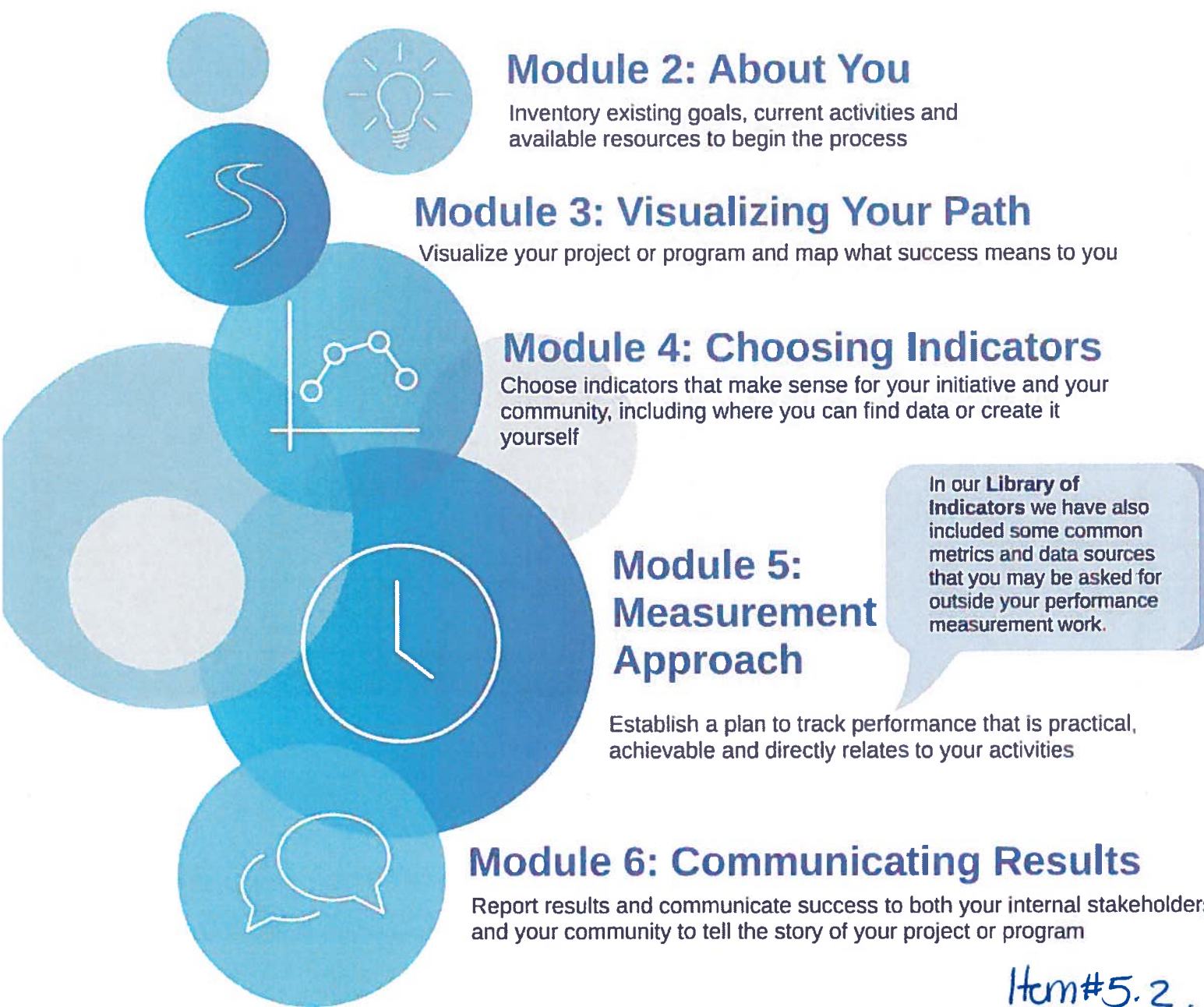
Hey! Look at what we're doing. We're making a real difference and we have value.

ANYONE can do it, EVERYONE can benefit

It is a customized process that can range from simple to complex, depending on the size of the project or program and capacity of those leading it. By understanding a few key principles, you can choose the approach that makes sense for your situation, and this guide will help you get there.

HOW CAN WE HELP?

This guide and learn by doing workbook will familiarize you with the key concepts and allow you to choose the approach that works for your specific context. The modules and exercises will walk you through the steps to create, implement and report on performance measurement.



Fictional Communities

For those who like to learn by example, we have created two fictional communities who will go through the process with you as a case study and comparator.

Fraser City, B.C.



Snapshot

- Population: 40,000 in B.C. Interior
- Strong forest industry with relatively diverse economic base (mining, agriculture, tourism, construction, health, recent entrant to knowledge/technology sector)
- Threats include aging population, stagnating household income levels, low employment growth in traditional primary industries, and limited supply of residential and industrial lands
- Opportunities include healthy and diverse service and resource-based economy, location

Economic Development

- Full time EDO, as well as an Economic Development Working Group (EDWG), made up of two councillors, two staff and six community leaders
- Economic development strategy was out of date, recently drafted a new one with the following prioritized goals:
 - Diversified economic base with emerging, non-traditional industries
 - Improved business climate that will attract new investment
 - Increased number of tourists and visitors to the community

Performance Measurement

- The EDO has been asked to align the strategy with a performance measurement plan and integrate current annual reporting. Concerns have been raised about the administrative burden, as well as the focus of the outcomes themselves.
- Some community profile information is being maintained on the website as a result of the Foreign Direct Investment (FDI) program and the local Visitor Centre was tracking attendance and other visitor information. Several other indicators are currently being tracked at the municipal level.

Milldale, B.C.

Snapshot

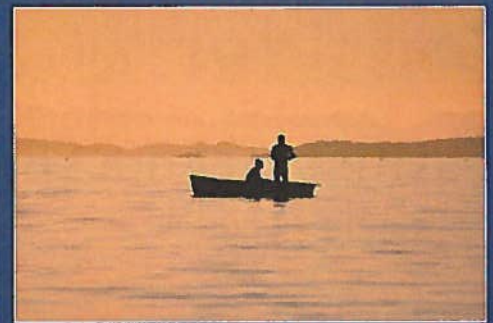
- Population: 4,000 in Bulkley-Nechako region
- Highly dependent on forest industry, with considerable contraction in recent decades. A local mine also closed five years ago due to high operating costs, low-grade deposits and stagnant metal prices.
- Threats: declining population, declining primary resource industries
- Opportunities: some tourism opportunities (though attracts mostly residents); very low housing and land costs; enough infrastructure to accommodate three times current population; two vacant mill properties, one of which given to Town by the Province

Economic Development

- Municipal planner handles economic development file under the direction of the Economic Revitalization Committee (ERC), a committee of Council
- Advisory Committee has recently been struck, with representation from local businesses, community groups and local First Nations with the objective of creating a community transition plan
- Committee decided to focus on building community wealth through new business development as an overarching goal, supported by three outcomes: two new export businesses; three expanded businesses in export or supply industries; population growth above the regional average

Performance Measurement

- Limited administrative resources and will be relying on voluntary committees/partners. Mixed success with similar approaches in the past, although it is believed a performance management framework can help provide some momentum for implementation and community support.
- Challenges include absence of baseline data, lack of economic profile and rudimentary website. Currently collected information includes in-house municipal data on services, industrial land and business licences.



Follow along with the fictional communities' workbooks:

Fraser City: <http://ow.ly/4ndwjO>

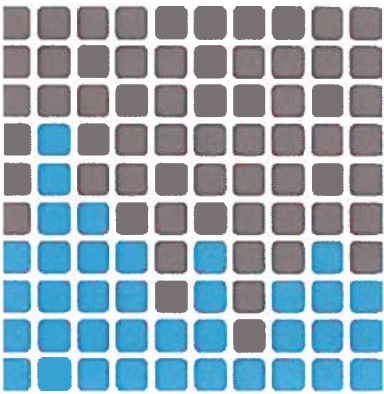
Milldale: <http://ow.ly/4nduZh>



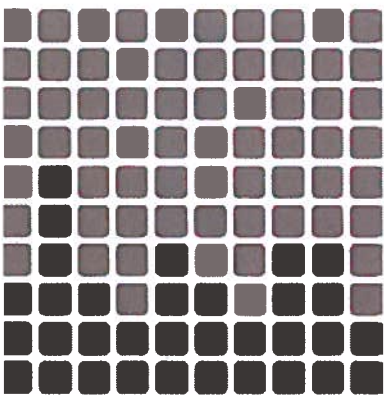
2. About You

The first step in performance measurement is to have a look at what you're currently doing, and what direction you're heading in.

Consider: All economic development work and activities that are both planned and underway



Do you have a strategic plan? If so, this document will help direct your performance measurement approach. Your plan likely lists some desired outcomes or goals, with associated activities or program areas that will support these outcomes.



If you don't have an economic development plan, don't worry. Any other strategy or planning document would be useful to consult (i.e., OCP, sustainability strategy, project plan, council planning session, even notes or minutes).

Your organization doesn't need to have a formal economic development strategy, or even a distinct economic development function, to do performance measurement. Performance measurement is a useful tool for individual projects, small programs or whole organizations – it is **scalable** to the size of the initiative, as well as the resources and capacity available. From tracking a few key indicators to having a full, ongoing measurement dashboard, there is an approach that can fit every situation.



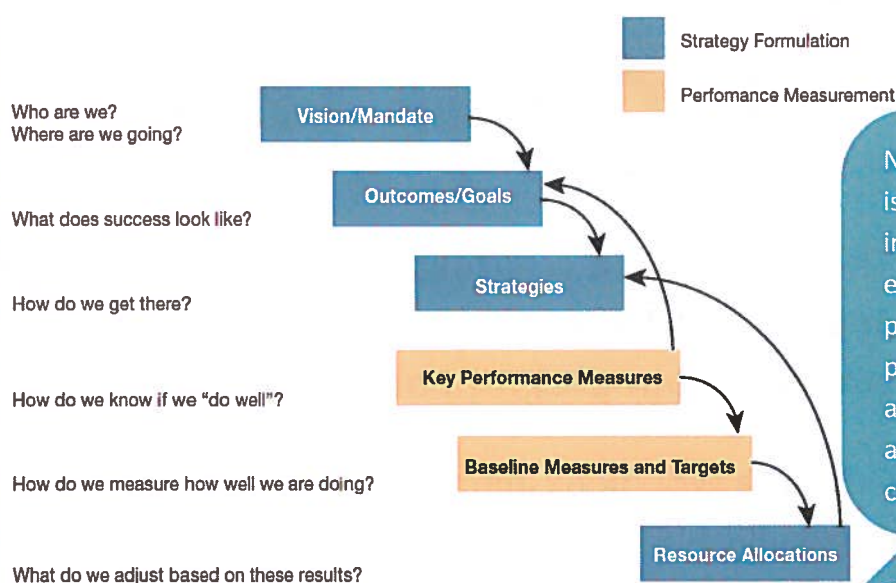
It may be useful to go through the process of creating your measurement plan as a small group, or to **check in with your key stakeholders** (such as board members, elected officials or CAO) throughout the process to ensure that everyone is on the same page and has a certain degree of buy-in and understanding of what performance measurement entails and the value it offers.

As you begin to think about performance measurement within the economic development context, it is important to assess your current state in a systematic way.

This is the time to reflect on the current status of the approach you are using to achieve economic development success in your community.

Overall, this reflection will better position you to apply performance measurement in an effective way and support your thought process in scoping the logic model that will guide the development of your performance measures.

Conceptual Model for Economic Development Strategic Plan with Performance Measures



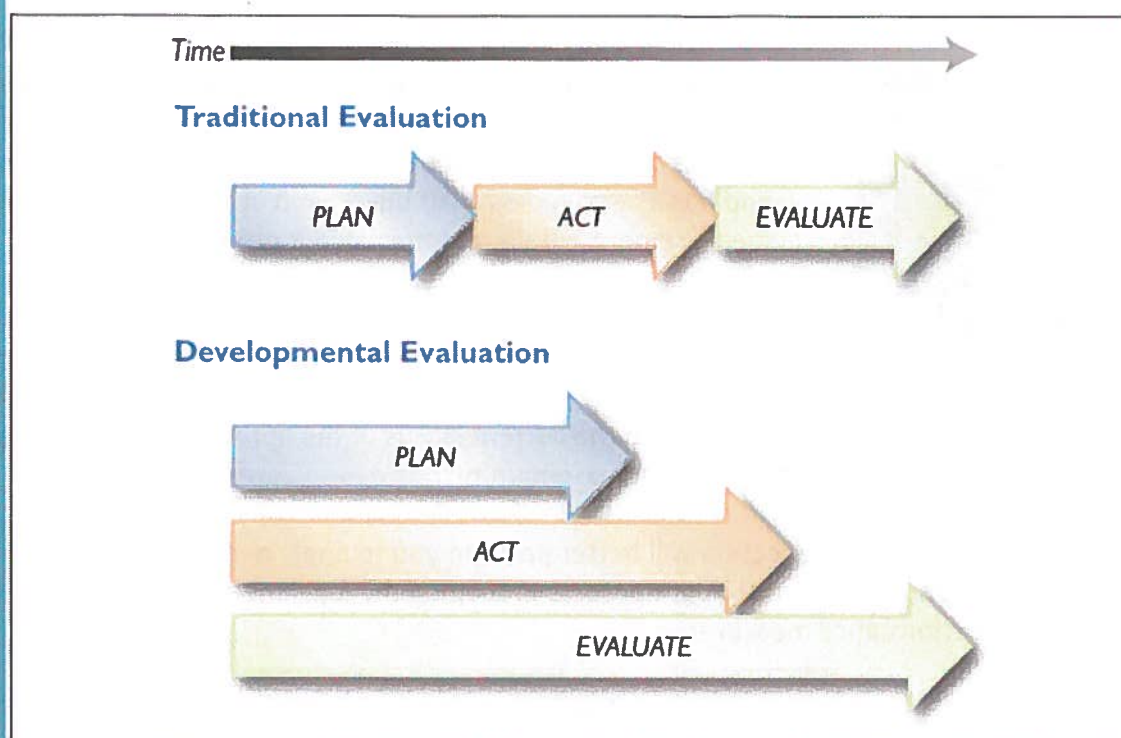
Consider each of these questions in the context of your program or activity. If you have them, use your strategic documents to guide you.

Note that while the process is linear in some respects, it includes feedback loops to ensure that as activities progress and evolve, the performance measurement approach correspondingly accommodates these changes.

Source: Ontario Ministry of Agriculture, Food and Rural Affairs. 2013. Measuring Up! Performance Measurement for Economic Development. Page 11.

Planning for both activities and measurement should be an ongoing conversation that is directly tied to the kind of economic development work you are undertaking. As your goals become clear, it is easier to decide how to measure your success or progress. In turn, these results serve as a barometer to help you hone the direction of your efforts and concentrate on high-value activities.

Traditional versus Developmental Evaluation Approaches



Used with permission from the *Measuring Up!* guidebook published by the Ontario Ministry of Agriculture, Food and Rural Affairs, 2013; Image adapted from Gamble, A Developmental Evaluation Primer, p. 30



ACTION

The first step in creating your performance measurement approach is to capture the current status of your program or project.



Open the Workbook and follow the instructions in the first tab: About You – Inventory. Here you will capture:

- your program's ultimate goal;
- the resources available for the program;
- the activities currently being undertaken; and
- Anything you're currently tracking or have been asked to track

Don't forget to refer to the fictional communities' workbooks for a follow-along example!

Download the workbook here: <http://ow.ly/4nduC2>



3. Visualizing Your Path

The next step in establishing a performance measurement approach is to visualize the entirety of your project or program from what you have available to you, to what you want to do and where you want to end up. A common way of achieving this is to represent your program as a **logic model**.

Although it may sound complex, a logic model is a relatively straightforward way to capture the elements of your project or program. Most importantly, it is a highly useful tool in helping to identify the key indicators to shape your performance measurement.

There are four main components of a logic model:

Inputs

Resources such as funding, staff time and other assets you have available to conduct the activities related to your program or project

Activities

The actions a program takes to achieve a particular result – essentially, it's what you do

Outputs

Specific values associated with your activities and what they yield, such as number of sessions conducted, number of clients served, or number of contacts made

Outcomes

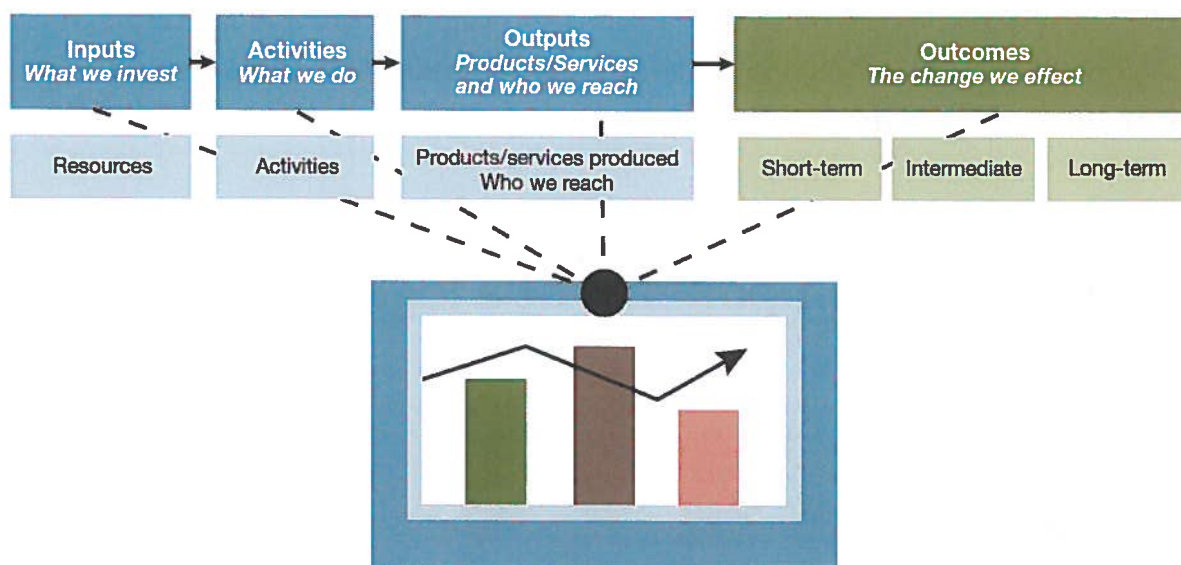
Changes in knowledge, skills, attitudes, values, behavior, or conditions that indicate progress toward achieving the program's mission and objectives

Logic Model: Linking Inputs and Activities to Outcomes

Performance Measures Should Help Us Decide:

Are We Doing Things Right?
Program Management and Planning (How?)

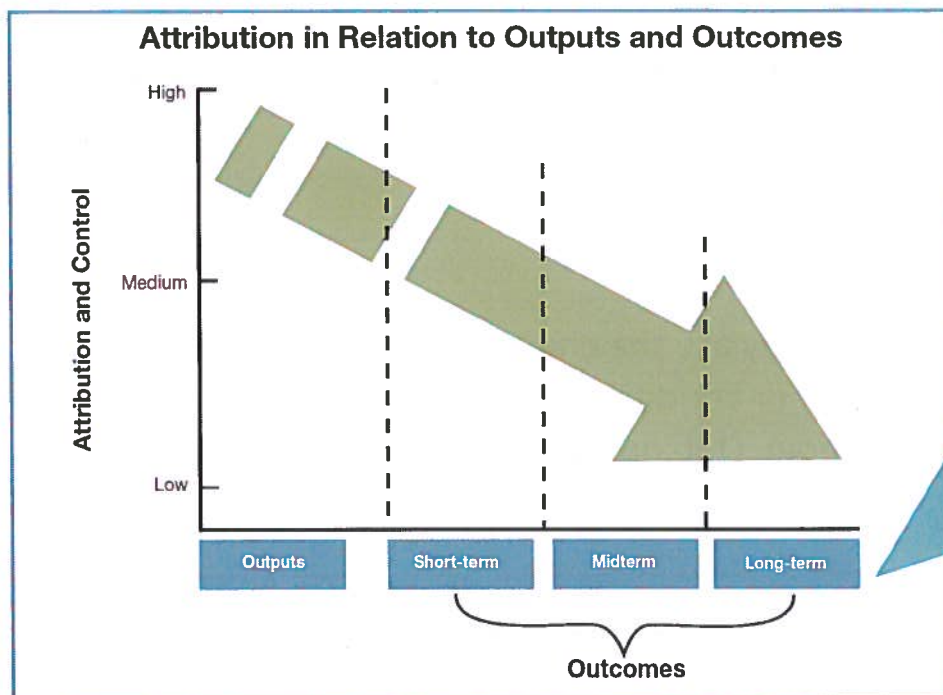
Are We Doing The Right Things ?
Strategic Planning (What?)



Performance Measurement Framework

Source: Ontario Ministry of Agriculture, Food and Rural Affairs. 2013. Measuring Up! Performance Measurement for Economic Development. Page 14.

Inputs, **activities** and **outputs** are relatively straightforward to determine. **Outcomes** – the core of a logic model – require a bit more consideration. While you have already determined your ultimate outcome or program goal, you may have realized that it's difficult to measure on its own. This is because it is, by design, both broad and influenced by a variety of factors, one of which is your project or program. This is known as the **attribution issue**.



Attribution refers to the ability to relate the outcome of an action to the action itself. In economic development, activities can be most closely linked with their outputs and short-term outcomes. It is more difficult to attribute the longer-term outcomes to their efforts because of external forces that are beyond the control of the community, such as economic cycles, market demand fluctuation, exchange rates, trade policies and global supply chains.

This is why looking at the **immediate and intermediate outcomes** is one of the most important steps in the performance measurement process. These outcomes are more directly related to the work you're doing (the activities and related outputs), and together lead towards your ultimate outcome, and can serve a proxy to indicate long-term success.

A logic model is a graphic illustration that shows the connections between the results you want to achieve, how you plan to achieve them and how you will validate them. By articulating the inputs, activities, outputs and outcomes of any project or program, it makes it easier to conduct both strategic/developmental work and performance measurement as you have a clear roadmap for success.



Outputs

The **outputs** set the stage for the outcomes by defining simply **WHAT** the activities will yield. Consider, then, the outputs as the starting line

with the ultimate outcome as the finish. What sign-posts along the way show us that we're heading in the right direction?

Outcomes

Outcomes represent the **WHY**. They are the changes in knowledge, skills, attitudes, values, behavior, or conditions that indicate progress toward achieving the ultimate goal. Outcomes should always be **SMART**.

Specific

Identify the target population and what will be accomplished.

Measurable

Ensure that the outcome is measurable (either through existing data sources or internal tracking), and how much change is expected.

Achievable

Be sure to identify outcomes that can be accomplished with the available resources and support within the timeline identified.

Relevant

The outcomes should relate to one another and the overarching program goal or mission.

Timely

The outcome should be grounded within a specific timeframe.

By taking some time to conceptualize and establish these all-important intervening outcomes, you're doing some of the most important work in performance measurement as well as setting the stage for the selection of clear, targeted indicators that will best demonstrate the progress and value of your work.



ACTION



Return to your workbook, and have a look at tab two: “Logic Model”



You will notice that the inputs, activities and ultimate outcome have already been populated based on your work in the previous section and tab. You’re already halfway done!

Summary Steps

01

As noted in the workbook, begin with determining the outputs related to your activities. Remember: these are simply the direct results of the activity, and tend to involve the word “number” in them as related to the **frequency and intensity of the activity**. They do not reflect if or how the action has been successful, just what it will yield.

Next, reflect on the short-term outcomes that follow from these outputs. These follow directly from the execution of the activity (i.e., the output) and address the **changes that occur in the level of participation, capacity, awareness, skills, knowledge, access or partner support**.

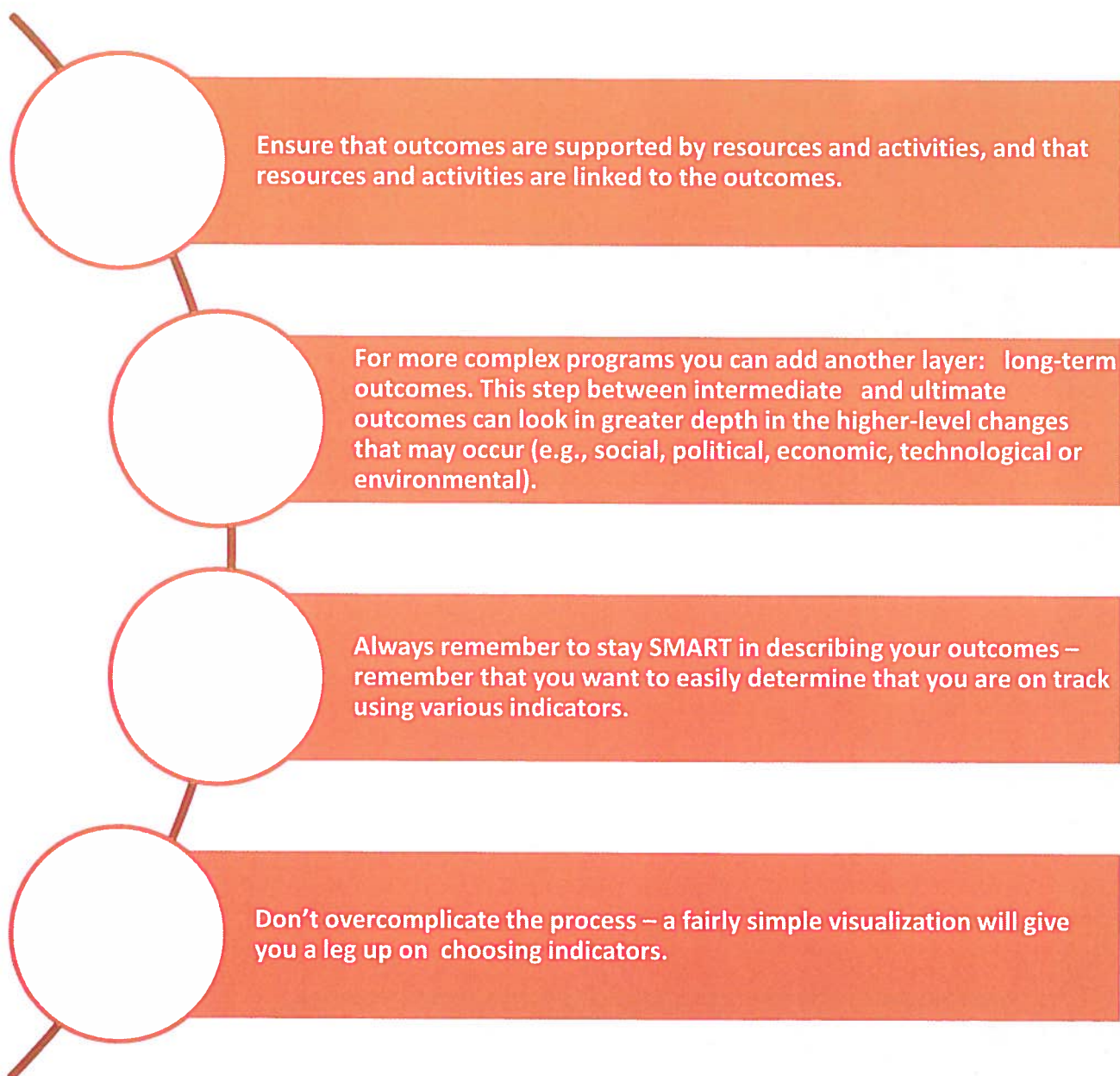
02

03

Once you have determined your short-term outcomes, consider your intermediate outcomes, the missing link between what happens almost right away, and what may result further down the road when your ultimate outcome is realized. Intermediate outcomes address the **changes that are seen in perceptions, attitudes, and behaviour among people and groups affected by the program or project**.



TIPS





4. Choosing Indicators

Selecting Performance Indicators

Whether you have gone through the previous step of establishing your outcomes or are arriving here directly, this module will guide you through choosing indicators (or metrics) that allow you to track program progress and measure performance. Indicators:

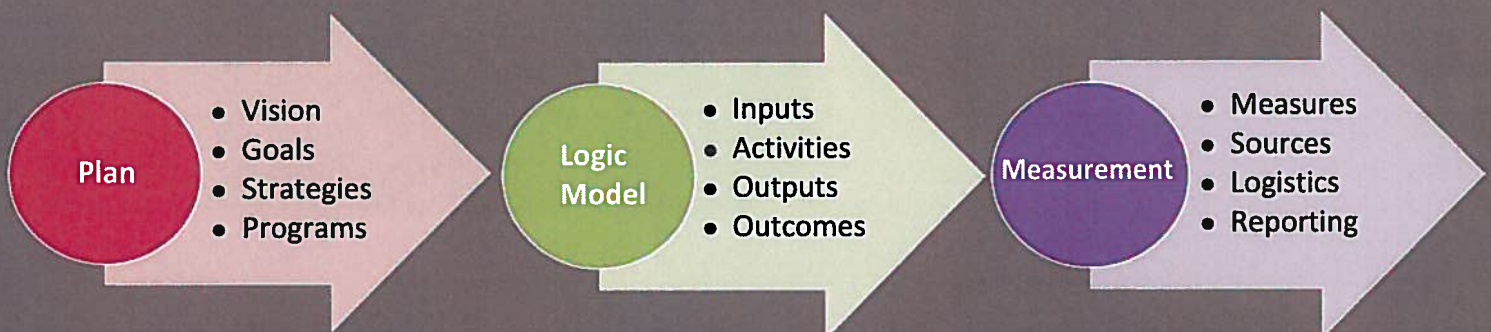
- Are used to assess whether or not outcomes are being achieved and what kinds of changes have occurred
- Can take the form of numbers, facts, opinions, or perceptions that help measure progress towards change
- Can also be used to track outputs and activities

Execution: Activities and Outputs

Simple outputs, such as counts of the number of meetings attended, contacts made and website hits, are easy to compile and report on.

Output indicators are important for measuring efficiency or the cost effectiveness of the activities resulting from the inputs. They do not help to measure the effectiveness of your strategy in delivering the desired outcome.

Linking to the Logic Model: Measuring Execution and Effectiveness



Common Indicators

Top Ten Measures used* in Canadian Economic Development

Answer Options	Response Percent	Response Count
New Businesses opened	73.4%	69
Population	67.0%	63
Jobs created full time	60.6%	57
Workforce	60.6%	57
Inquiries received	59.6%	56
New Business investment attracted	58.5%	55
Building permits - Commercial	53.2%	50
Building permits - Institutional	51.1%	48
Business closures	48.9%	46
Unemployment rate	47.9%	45

Source: EDAC (2011), Performance Measurement in Economic Development, p. 11

These indicators are designed to measure the effect or impact your project or program is having, and if it's progressing as intended.

Remember the attribution piece, and emphasize indicators that are most closely related to (and controlled by) your work.

Remember: an organization tends to have a higher degree of control and greater ability to link activities and inputs to outputs and short-term outcomes than with the long-term outcomes. It is more difficult to attribute the longer-term outcomes to their efforts.

*A 2011 EDAC survey found these to be the top ten most frequently used indicators in local economic development work. The most important thing to keep in mind is to ensure that the most relevant, trackable and attributable indicators are used in your measurement approach, tied closely to program outcomes, outputs and activities.

Use both quantitative and qualitative indicators to tell your story

Quantitative

Examples:

- % satisfaction
- % completed/attended
- Number of new developments, business licenses
- Number/frequency of contact

Quantitative indicators are what we often think of as related to performance measurement: numerical values (percent change, dollar amount, or other value) from a specific source

Qualitative

Examples:

- Anecdotes/accolades from local business% completed/attended
- Testimonies, endorsement or praise
- Comments on survey or summarized content of interviews, focus groups, conversations
- Success stories or case studies

Qualitative indicators, however, are also very important to include in your approach. More subjective in nature, they too provide 'evidence' that your program is on track through the use of narrative, anecdotes and first-person accounts from program staff, end users or stakeholders

Both are important; there should be
“No numbers without stories, no stories without numbers.”

Source: Root Cause. A. Wolk et al. 2009. Building a Performance Measurement System. Using Data to Accelerate Social Impact. Page 22.

Create and retrieve relevant data

Primary Data Sources: those that involve the building or collecting locally derived data firsthand.

This could involve tracking specific activities like creation of new jobs by surveying the local business community, or using tracked municipal data at the local level. This also includes tracking economic development activities and outputs such as number of times businesses have been contacted, tracking web activity or the number/type of activities that have been undertaken.

TIP: Browse the **Indicator Library** in the workbook to view a list of indicators to consider, with BC-specific resources listed.

Secondary Data Sources: those that involve the use of existing data sets produced by external agencies.

This could be real estate sales numbers for the area, unemployment rate, or population change. Common sources include Statistics Canada and BC Stats.

Choosing indicators

To make sure you're covering all bases, it is often most effective first to brainstorm a long list of all possible performance indicators.

TIP: Keep your long list filed away. It may be useful to return to as your program evolves, or if you're asked to find or track particular community or economic data.

However, as too many indicators increases the cost and complexity of measuring performance, we recommend prioritizing your list and narrowing down the scope to a collection of high-activities in an effort to make your performance efforts as efficient and effective as possible.

Communication is key...but not necessarily performance measurement

- Be aware of the difference between indicators related to your performance measurement work, and the data you are asked to track as part of your economic development function
- Keep them separate! All indicators being used to demonstrate the success or progress of your program should be tied directly to the program's activities, outputs and outcomes
- Any indicators that do NOT provide support or evidence of your program's progress should be tracked and contextualized separately as economic data collection and reporting
- This becomes very important when you are reporting on your program's activities or attempting to demonstrate the value of the work being undertaken. Integrating general economic data into your performance measurement is at best confusing or misleading, and at worst can make it seem like the program is ineffectual or vague in its goals

Examples of where this often occurs is for **population data, jobs tracking or other general demographic or economic data**. These variables have so many factors influencing them that often they are too broad to be attributing to your program activities or projects. While they are important to keep abreast of, be sure to identify them as communication indicators rather than under the umbrella of program measurement (unless, of course, they correspond to outcomes specifically identified in your logic model).

You will be guided through this differentiation in the workbook exercise for the module.



ACTION:



Workbook: Open the "Indicators – Long List" tab of your workbook.

If you have not yet downloaded a workbook, you can access the indicator-specific version here: <http://ow.ly/4nduP1>

Create a **long list** indicators by considering the following elements:

- First, note the data you are already collecting, or have been asked to collect. This will be auto-filled for you from the "About You" tab, but feel free to modify or add to as needed.
- Next, consider your logic model (if you created one – otherwise consider your general program vision and desired outcomes) and brainstorm indicators that would provide support or evidence for the components. It is often helpful to print a copy of your logic model and write directly beside each element how it could possibly be measured. This can also be done within a group discussion using sticky notes.
- Finally, have a look through the "Indicator Library" to see if there are any other relevant data sources to consider and include, even as communication data.

TIP Creating the Long List of indicators often necessitates a re-evaluation of the logic model. Keep tweaking and modifying the model as you go through the indicators and begin to develop a clearer picture of how this data will help indicate success and progress of your program activities

TIP The Indicator Library may be useful for other departments as well.
Download standalone library here:
<http://ow.ly/4nduUP>

Short-listing indicators

Short List:

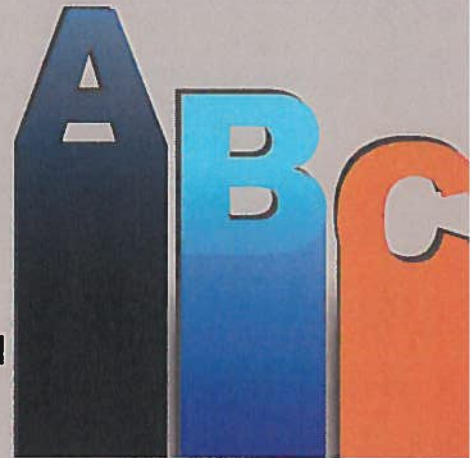
Navigate to the **“Indicators – Short List”** tab. Your long list is already there – now time to prioritize! To help you do so, first take a moment to identify the **data sources** that you would look to for each indicator. This could be data you retrieve from elsewhere (secondary data) or that which you collect yourself (primary data). It could also be quantitative or qualitative in nature.

Next, give each indicator a **score out of five** on three different parameters:

A - Importance of the indicator for accountability and decision making; in other words, how necessary it is for you to collect and report on this specific indicator for your own or others’ decision making or general information

B - Accessibility or ease of collecting information about the indicator

C - How much control you have over change expressed by the indicator, or the degree to which this indicator can be attributed to your program activities



This scoring system allows you to select the measures of the **highest importance and lowest effort/cost to track**, and only those that you can have a reasonable degree of control over. The resultant score will be generated for you. This is to be used as a guide – feel free to let your experience and practicality direct your final decisions.

While the final indicator list is up to you, we generally recommend including any that receive a score of **10 or higher**, consider including those **between 6 and 9**, and not including those with a score of **less than 6**.

Once you have considered each indicator and the list as a whole, indicate in the last column whether you intend to include them in your performance measurement workplan by choosing **“yes” or “no”**.



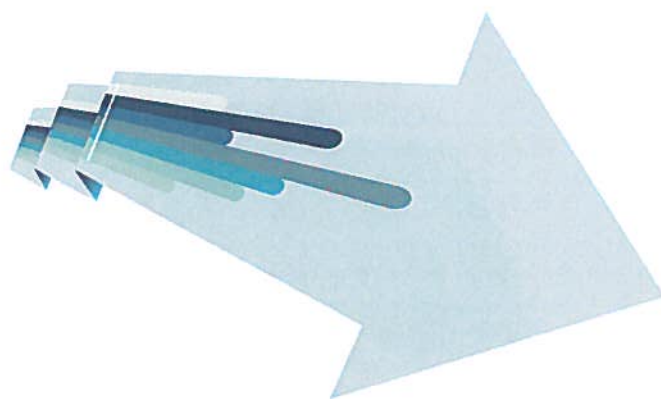
5. Measurement Approach

Pulling it all together

At this point you have either visualized your path and selected your indicators in the previous modules, or perhaps you've come directly here because you just need to fine tune your existing program.

In either case, it's time to prepare a workplan that will guide your performance measurement efforts.

Having a logic model and short-list of indicators allows you to visualize your program and what success looks like.



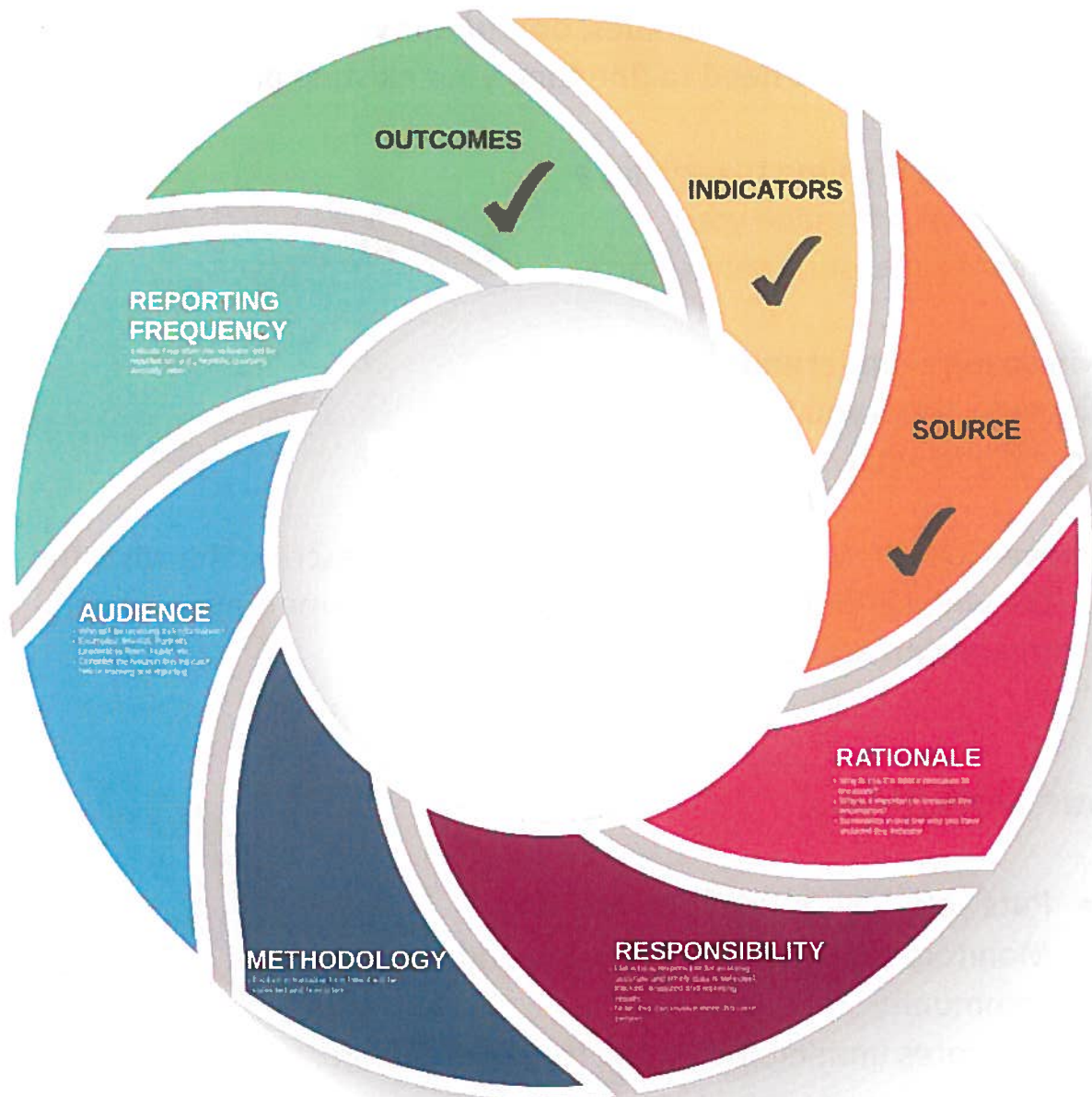
To move from theory to action, it is essential to describe the who, the why, the when and the where that will guide implementation of your performance measurement.

Your workplan...

- Puts your logic model into **action**
- Monitors **change** in the economy and community
- Promotes **understanding** the forces of change
- Allows your community to keep **informed** and **plan** effectively
- Is a **continuous** process
- Is important to **adjust** and **adapt** as needed
- Allows your community to **visualize** and **track** success



Workplan components



RATIONALE

- Why is this the best information to measure?
- Why is it important to measure this information?
- Summarize in one line why you have included this indicator

RESPONSIBILITY

- List who is responsible for ensuring accurate and timely data is collected, tracked, analyzed and reporting results
Note: this can involve more than one person

METHODOLOGY

- Explain in narrative form how it will be collected and how often

AUDIENCE

- Who will be receiving this information?
- Examples: Internal, Partners, Leadership Team, Public, etc.
- Consider the function this indicator has in tracking and reporting

REPORTING FREQUENCY

- Indicate how often the indicator will be reported on. e.g., monthly, quarterly, annually, other

Key definitions

A **baseline** is the quantifiable starting point needed to measure change. The most common expression of a baseline is the value of an indicator today.

To guide you, you could look to **benchmarks**, a standard or point of reference with which to measure change. This could consist of comparing yourself to a different community, a different point in time or against a recognized standard.

Based on baselines and benchmarks, reasonable and achievable **targets** may be set. They should link back to the goals of your plan or program(s).

Some examples

Baseline

You have identified growth in the tax base as an outcome and assessed land values as an indicator. You plan to measure this value annually and report it to your Board or Council as both a percentage change and total dollar value. Your starting point for assessed land values is today - that will be your baseline. There is no way of identifying change without a baseline.



Benchmark

You have identified growth in the tax base as an outcome and assessed land values as an indicator. You plan to measure this value annually and report it to your Board or Council in dollar terms of perhaps percentage change. Your starting point for assessed land values is the community next door—that will be your benchmark. Tracking change against benchmarks can enrich your performance measurement.





ACTION

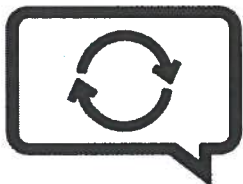
Open the “Measurement Workplan” tab of your existing workbook, or download the Measurement Workplan template if you do not yet have a workbook:

<http://ow.ly/4nduGF>

Complete a row for each of your chosen indicators.

You have already completed the first part of your workplan by establishing the logic model elements, indicators and data source in your short list. Copy over this information to get started on your workplan.

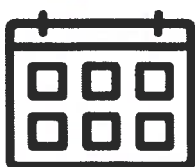
Next Steps



Once completed, ask for feedback from key stakeholders and ensure that you have awareness and buy-in of your monitoring plan



Be sure to clearly communicate the process leading to its creation and how its implementation will work in terms of the logistical details, reporting, and value the process adds



Ensure that everyone knows who is responsible for what, and who is taking the lead on keeping the plan current and successfully implemented

Implementing and Sustaining

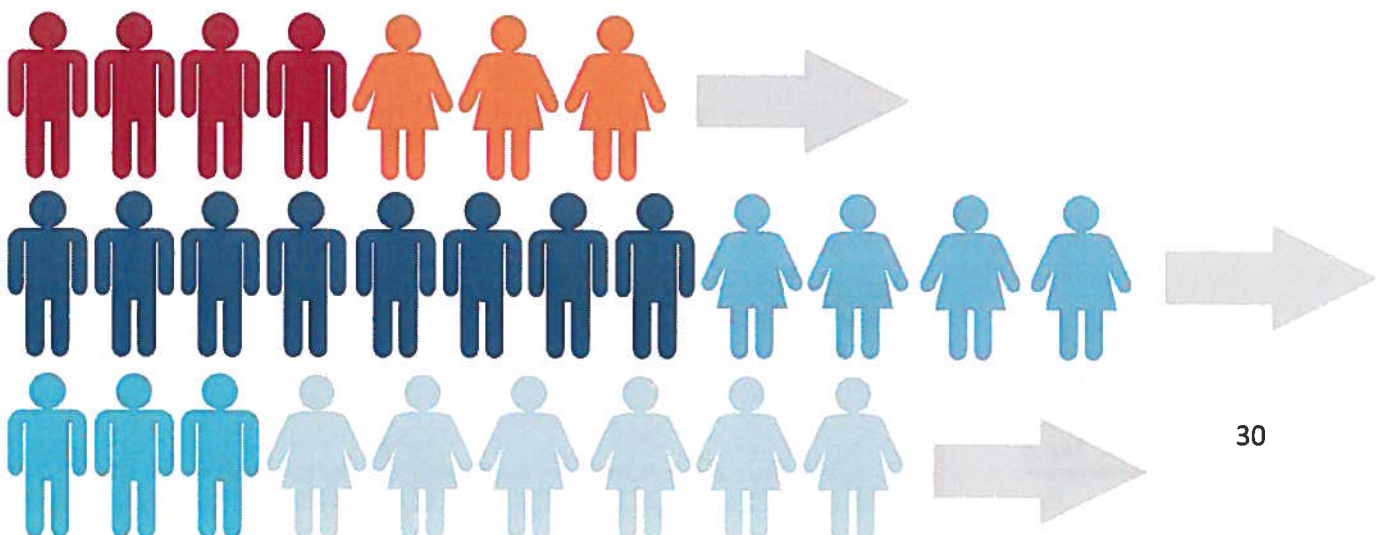
Your plan, program and measurement workplan are all **living systems** that are meant to change over time.

Remember the cyclic nature of performance measurement and continue to **monitor and adjust** as necessary.

You will be checking and monitoring performance against the targets you have set and will also take corrective action to **stay on track** if needed.

How to Break through Performance Measurement Barriers

- Embed performance measurement into organizational culture
- Recruit and engage senior leaders
- Communicate the purpose of performance measurement
- Ensure performance information drives continuous improvement
- Encourage stakeholder participation
- Train and educate stakeholders





6. Communicating Results

Considerations

One of the most important aspects of performance measurement is clearly communicating about your program's progress and successes

Consider the following:

What is the purpose of reporting?

Examples:

- Internal reporting to officials
- External reporting to investors in order to attract financing
- External reporting to non-government organizations in order to create and foster partnerships, advertise your community
- External reporting to broader public in order to attract businesses and workforce

Who is your audience and what do they need to know?

What is the story that you want to tell them?

It's more than numbers...

- Depending on the audience, choose a few main indicators to focus on and make them central to your report
- Remember to use both quantitative and qualitative indicators
- Use anecdotes, pictures and quotes to ground your results

Internal: board, council, committee, funders – demonstrate progress and value

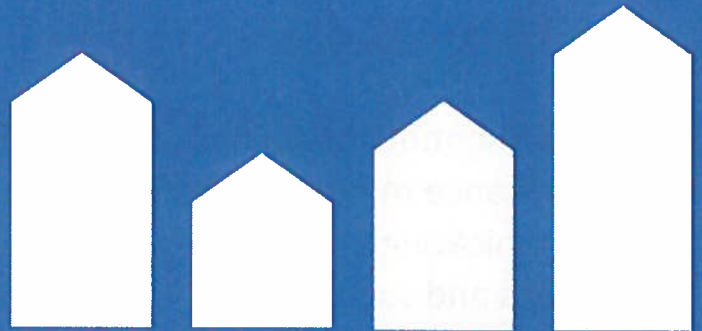
External: business, industry, investors, partners, public – show community success, growth or resilience; attract or retain investors/businesses



TYPES OF REPORTING

You may have many different forms of reporting for a variety of audiences, both internal and external. For example, you may be asked or choose to produce:

- An annual report
- Quarterly reports
- Presentations
- Web updates
- Newsletter updates
- Ad hoc requests



Having a core template or dashboard of your indicators can go a long way in reducing the time and effort required to generate various forms of reporting, as well as ensuring a consistent approach.



Source: Edmonton's Citizen Dashboard. <https://dashboard.edmonton.ca/>



The dashboard does not need to be complex – use simple shapes and colours to indicate progress in combination with minimal text for each indicator.

Secrets of a Good Dashboard

- Well-designed, easy-to-read layout of key indicators or composite of indicators
- Imagine a car's dashboard and not a plane's
- Small number of community-wide indicators
- Small number of program indicators



DASHBOARDS FOR MONITORING AND REPORTING

A dashboard is simply a snapshot of one's current status.

A performance measurement dashboard provides economic development practitioners, decision makers and stakeholders with data and information that informs the economic development process. It is:

A visual presentation of
performance
measurement

An illustration of the
current status of
indicators and their
trends

Access to multiple
indicators at a glance

An indication of
efficiencies and
inefficiencies

A key input into reports

A guide for aligning
goals, strategies and
outcomes

A guide for the
allocation of resources

HOW TO BUILD REPORTS

We recommend having template or dashboard of your indicators updated regularly, and used as the basis for reporting in the following ways:



Type of Report	Audience	Dashboard Integration	Supplement With...
Annual Report	Internal (board, council, committees, funders); though may also publish for public use	Use as executive summary and/or as base to expand upon	<ul style="list-style-type: none"> ➤ Information about the larger economic context of your community and region ➤ Context about your measurement program ➤ Specific details about each of your indicators ➤ Anecdotes or case studies showcasing achievement ➤ An analysis of what the status of your indicators means in a broader context in terms of progress and direction ➤ Conclusions, next steps and an overview of the following year
Quarterly Reports	Internal (board, council, committees, funders)	Use to comprise the bulk of your report	<ul style="list-style-type: none"> ➤ Brief introduction and context ➤ Contextualize any updates or changes of note since the last report ➤ Highlight the activities for the next quarter
Presentations	Internal (board, council, committees, funders), External (public, business, industry, investors, partners)	Use to structure your presentation	<ul style="list-style-type: none"> ➤ Depending on needs, can supplement similarly to quarterly report
Webpage	External (public, business, industry, investors, partners)	Use as the landing page for your activities	<ul style="list-style-type: none"> ➤ Can leave as-is, or allow users to click through for more detail about each of the indicators ➤ Provide general information about your program and activities ➤ Can provide additional graphics and/or anecdotes or case studies to showcase achievement ➤ Make annual reports available for download
Newsletters	External (public, business, industry, investors, partners)	Feature elements of the dashboard as needed/appropriate	<ul style="list-style-type: none"> ➤ Keep high level as update on progress ➤ Supplement with a feature anecdote or example of the work completed in a given indicator
Ad hoc requests	Any	Elements ready to use when required	<ul style="list-style-type: none"> ➤ Depends on context; dashboard indicators allow you to update and pull in wherever necessary



TIPS

Internal Audience Reports

- Balance detail and technical information with a succinct, clear approach that draws out key themes
- Account for external events and forces beyond local control (economic cycle, exchange rates, trade policy, commodity prices)
- Show awareness of competition for scarce funds
- Link expenditures to “investing in the future”

External Audience Reports

- Plain language, no technical jargon
- 1-2 page summary at beginning
- Use pictures, charts and graphs to help readers visualize (but sparingly)
- Conclude with main points and achievements
- Involve an overall narrative and/or qualitative support of key facts (such as anecdotes, pictures, case studies or testimonials)

Design

- When designing an external report, only essential data should make it into the infographic (i.e., do not get diverted by measures such as Return on Investment (ROI) that are not in your workplan). Usually people just want to see the overall impact and where the money went.
- Align the design of your report with your existing design elements (i.e. community website), so the style of your messages looks consistent.
- Make sure your reports are consistent through different time periods in order for the audience to track your progress easily.

Communication

- Your reports can help with ongoing communications that both inform stakeholders and the public and build trust and support
- Reach out and make available through:
 - Website, cross-link to partners' websites
 - Social media (Linked-In, Facebook, Twitter)
 - Traditional media, newspapers, radio, television outlets
 - Word-of-mouth, board, staff, councillors
 - Event presentations and promotion
 - Response to direct enquiries



CHECKLIST

- ☒ Is the report easily accessible?
- ☒ Is the purpose and intended audience clearly stated?
- ☒ Is it as succinct and as clearly worded as possible?
- ☒ Does it connect performance results to the strategy outcomes?
- ☒ Does it focus on the few critical aspects of performance?
- ☒ Does it explain actual results for the reporting period and compare them with planned results, explaining any significant variances?
- ☒ Does the report provide comparative information about trends, benchmarks, baseline data or the performance of other similar organizations?
- ☒ Does the report describe lessons learned and key factors influencing performance and results?
- ☒ Does the report link the plan/strategy with financial and non-financial performance information?
- ☒ Does the report convey a 'narrative' element with anecdotes, quotes and/or pictures?



ACTION



Download the dashboarding template to use simple, infographic style elements to track and report on your key indicators.

<http://ow.ly/4ndCbO>



Access the Annual Report template for guidance on how to structure your annual report, how to integrate your dashboard and what to include. <http://ow.ly/4ndv6J>

Remember: be sure to clearly differentiate between the general economic indicators you report out on and those that you have tied to your performance measurement strategy.



Browse additional templates and images from the Image Library to ensure your report is succinct and eye-catching - <http://ow.ly/4nduKN>

Fictional Communities

See below for downloadable examples of various reports for our Fictional Communities:

- Fictional communities' dashboards: <http://ow.ly/4ndvfo>
- Fraser City annual report: <http://ow.ly/4ndvaC>
- Milldale quarterly report: <http://ow.ly/4ndv2G>

References

A.Wolk, A.Dholakia, K. Kreitz. 2009. Building a Performance Measurement System. Using Data to Accelerate Social Impact. A Root Cause How-to Guide. Available at:
<http://www.rootcause.org/docs/Resources/Books/Building-a-Performance-Measurement-System/Building-a-Performance-Measurement-System.pdf>

International Economic Development Council. 2014. Making it Count: Metrics for High Performing EDOs. Available at: <http://www.iedconline.org/web-pages/resources-publications/edrp-publications/>

Matthew Fischer & Associates Inc. 2011. Performance Measurement in Economic Development. Prepared for EDAC. Available at: http://edac.ca/wp-content/uploads/2014/03/Final-Report-Oct-20-Performance-Measurement-in-Economic-Development-EDAC-Project-Sept-version_Addition_May7_2013.pdf

Newfoundland Labrador Provincial Government Programs Cabinet Secretariat, Executive Council. 2011. Developing an Accountability Framework Resource and Reference Guide. Available at:
<http://www.policynl.ca/policydevelopment/documents/AF-Aug-Final-Version.pdf>

New Zealand State Services Commission and The Treasury. 2008. Performance Measurement. Advice and Examples of How to Develop Effective Frameworks. Available at:
http://www.ssc.govt.nz/upload/downloadable_files/performance-measurement.pdf

Ontario Ministry of Agriculture, Food and Rural Affairs. 2013. Measuring Up! Performance Measurement for Economic Development

Vital Economy Alliance. 2012. Performance Metrics Matter. Prepared for National Association of Development Organizations. Available at: <http://www.nado.org/performance-metrics-matter/>