



Embracing the New Economic Realities: After the Wildfires

Economic Opportunity Assessment
June 2017



TABLE OF CONTENTS

I.	EXECUTIVE SUMMARY		V.	SWOT	29
	a. Rebuild. Recover. Renew.	3	VI.	BUSINESS AND ECONOMIC RECOVERY BEST PRACTICES	32
	i. Unique Economic Influencers	4	VII.	RECOMMENDATIONS FOR ECONOMIC RECOVERY	33
	ii. Feedback Provides Foundational Data			a. Opportunity Overview	33
	b. Assessment Snapshot	5		b. Recommendations and Proposed Timelines	35
	i. Key Factors	5		i. Business and Economic Recovery	36
	ii. Key Challenges Summary	6		ii. Business Retention & Expansion	39
	iii. Key Opportunities Summary	7		iii. Business Development & Economic Growth	42
	iv. Recommendation Overview by Timeline	8	VIII.	THE NEW NORMAL	46
II.	EMBRACING THE NEW ECONOMIC REALITIES		IX.	GLOSSARY	47
	a. Note to Readers	9			
	b. Elements of Economic Recovery	10			
	c. RMWB Community	11			
III.	THE ECONOMIC ASSESSMENT	12			
	a. Project Mandate	13			
	b. The Team	14			
	c. Methodology	15			
	d. Engagement Process	16			
	e. Steps From Response to Recovery	17			
IV.	ECONOMIC ASSESSMENT FINDINGS				
	a. Stakeholder Groups Interviewed	19			
	b. Stakeholder Feedback	20			
	i. RMWB Governance / Process	20			
	ii. Insurance	21			
	iii. Real Estate	22			
	iv. Business Supports	23			
	v. Workforce	24			
	vi. Market Access	25			
	vii. Social Impact	26			
	viii. Economic Impact	27			
	ix. Business Resiliency				

I. EXECUTIVE SUMMARY

a. Rebuild. Recover. Renew.

Since the devastating May 2016 Horse River Wildfire that displaced over 80,000 residents and destroyed 1,595 structures (2,579 dwelling units), the Regional Municipality of Wood Buffalo (RMWB) has moved forward with a dedicated resolve to rebuild, recover and renew this dynamic region.

With the tenacious efforts of thousands, the community was able to successfully transition from the critical emergency response phase into the extensive rebuilding and economic recovery stages. Compounding the impact of this disaster, unfortunately, is the fact that the wildfire struck just as the RMWB was absorbing and reacting to the major economic hit of the declined oil and gas industry – the primary employer and driver of the local economy.

The true impact of the wildfire on the heels of the significant economic downturn may not be known for some time. What is known, however, is that the short-term recovery and long-term success of the Wood Buffalo region will be most impacted by today’s strategic commitment to business revitalization, economic recovery, and regional resilience.

This report, ‘Embracing the New Economic Realities: After the wildfire,’ identifies the recent economic assessment of the RMWB business environment. This report shines a spotlight on the state of the overall business sector within the region. It reflects the voice of multi-tiered stakeholder groups and their views of what’s working, what needs improvement and, ultimately, recommendations for ways in which businesses, industry (i.e. the Oil & Gas sector) and the community can work collaboratively towards success.

This formal economic assessment process was led by the Economic Developers Alberta (EDA) and a specifically-re-

cruited Economic Opportunity Assessment Team (EOAT), highly experienced in disaster recovery nationally and internationally. Collectively, this volunteer group committed to:

- 1) a pre-assessment review of the RMWB: historical facts, economics, demographics, socioeconomics, etc.,
- 2) a one week site assessment and stakeholder engagement process in January 2017, and
- 3) a subsequent review of business and stakeholder feedback, identification of key challenges and opportunities, and pragmatic recommendations for economic recovery.

This document is a reflection of confidential interviews (individual and group meetings) including:

- 125 one-on-one business interviews
- 31 community organizations
- 27 individuals in civic leadership roles and
- 24 rural stakeholders

In total, 207 individuals were engaged from business and social organizations, industry and government.

Note: While an interview sample of 207 (of 4,100) businesses is neither statistically reliable nor unbiased from a pure market research perspective, it does present some valuable stakeholder viewpoints.

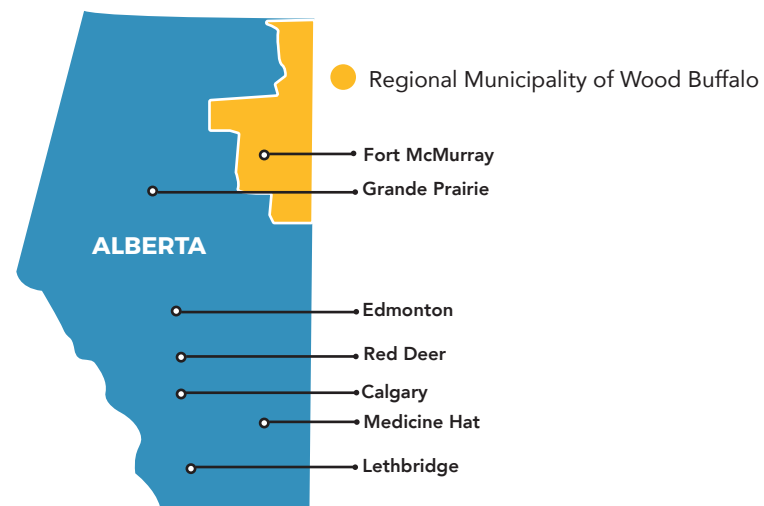
i. Unique Economic Influencers

In working towards economic recovery and a productive ‘new normal,’ it is important to note that the Wood Buffalo region must consistently account for a variety of unique factors.

- **Jurisdictional Issues:** The RMWB is designated as a ‘specialized’ Municipality, with three active levels of governance. While the provincial, federal and First Nation governments have control of specific lands and resources, the Municipal government is an amalgamation of urban and rural communities.
- **Pre-wildfire Economic Reality:** The dramatic decline of global oil prices (2014 onward) provoked the ongoing economic downturn which significantly impacted the energy-dependent RMWB economy.
- **The Disaster:** The economic shock of the wildfire directly impacted more than 80,000 residents and over 3,900 businesses.
- **The Community:** The RMWB region is situated five hours away from the nearest metropolitan centre and operates as a unique micro-economy, supporting multiple rural areas as well as the urban hub. In May 2017, the RMWB approved a new population projection developed by Nichols Applied Management. For 2016, it was estimated that between 71,800 to 74,200 people lived in the Urban Service Area and that 3,580 lived in rural hamlets. The RMWB is also home to a shadow population (temporary residents who work in the area for more than 30 days a year) which, according to the 2015 Municipal Census, was over 43,000 people.

Feedback Provides Foundational Data


Recommendations within this document are a direct result of feedback gathered from participating stakeholders. While not meant to be a statistical, quantitative report, the extensive detail herein directly represents the actual business concerns and needs within the RMWB. This assessment incorporates the EOAT’s research, stakeholder engagement, professional experience and perspective, while offering a number of immediate, short, medium and long-term recommendations. Collectively, this foundational data is designed to assist economic strategy development, and accelerate the region’s sustainable economic recovery.



b. Assessment Snapshot

i. Key Factors







- The region was already dealing with one significant crisis (i.e. the economic downturn due to the declined commodity prices) that negatively impacted housing prices, unemployment and vacancy rates prior to the 2016 wildfire.
- Individuals, families, business owners, industry, first responders, and many of those affected by the wildfire suffered significant and varying degrees of emotional and financial stress that will have impact for years to come.
- The proposed Government of Alberta Bill 21 will significantly shift the tax burden from major industry to local businesses and residents within the region.
- The region's environmental stewardship, in particular development within the Oil Sands, has been the target of much negative international reaction. A much lesser known component of the industry involves its world-leading advancements in land use reclamation, reducing greenhouse gas emissions through innovative technologies, water management and the preservation of biodiversity.
- A young population (under 34 years of age) makes up the majority of the RMWB community and is committed to creating a dynamic new normal.
- Much of the region's economy was founded on a keen entrepreneurial drive and 'can do' attitude. That same attitude is apparent today along with a strong eagerness to recover and rebuild this unique community.



The region was already dealing with one significant crisis (i.e. the economic downturn due to the declined commodity prices) that negatively impacted housing prices, unemployment and vacancy rates when the second crisis occurred.

ii. Key Challenges Summary

Stakeholder interviews identified the following top perceived issues as most impactful to business recovery. (Percentages reflect the overall importance ranking of individual issues.)

Processes & Governance:	33%	
Businesses expressed that there was insufficient two-way engagement between Municipality, business and industry; Inefficient permitting and regulatory timelines; Municipal barriers and confusion adding to the cost and complexity of doing business in the RMWB; Municipal departments operating in silos; Lack of clear and frequent communications. Businesses felt the lack of community vision created disjointed, inconsistent Municipal services.		
Insurance:	19%	
Lack of proper insurance, policy interpretation and clarity. Most local businesses had limited capacity to cover the costs of repairs and revenue losses.		
Real Estate:	12%	
High rent and lease rates; Landlord issues; Lack of affordable commercial/industrial space; Obsolescent downtown core.		
Business Supports:	11%	
Lack of Municipal business outreach, engagement and support; Need to address unique challenges facing rural businesses; Insufficient resiliency training, marketing support. Confusion over funding programs. What was available to whom?		
Workforce:	8%	
'Mismatch' between available workers, their skills and the job skills in demand; loss of entry level staff.		
Market Access:	6%	
Lack of RMWB procurement opportunities for regional businesses; Insufficient connecting of rural businesses to markets.		

Cross-sector Challenges

Social:

The disaster caused mental and emotional stress that affected the ability of business operators and employees to return to work; effects were further compounded by a depleted capacity in the healthcare system, including an ongoing out-migration of doctors and other medical staff.

Economic:

Issues pertaining to cash flow, lack of revenue, economic downturn.

Indigenous Issues:

Lack of inclusion and connectivity; market access; effective regulations and processes; food security; recognition of wildfire efforts. Additional issues regarding workforce, real estate, insurance, and overall social impact.

The challenges identified by businesses at the time of the assessment were a snapshot of what was being experienced during a very difficult time. While there was definitely frustration, fear and anxiety; there was also an underlying hope and belief that things could and would get better.

A detailed review of identified challenges may be found at pg. 20

iii. Key Opportunities Summary

On the flip side of the identified challenges are the myriad opportunities that give the region the chance to hit the 'reset' button – to take time to build a solid, operational foundation that will support strong, sustainable economic growth.

Based on the stakeholder feedback and overall assessment, the EOAT has identified a number of specific actions that could greatly impact the entire region's advancements in economic recovery:

- Receptive leadership: Provide effective, efficient governance, accountability and structure that is committed to pragmatic, timely solutions. Focus on building strength within the region first and foremost before attempting investment attraction.
- Redefined vision: Create a realistic and progressive regional vision now on which strategic development and implementation can build.
- Research-based strategy development: Make informed decisions by first thoroughly identifying the problem/need as well as the region's vulnerabilities and assets. Build on all available research, resources and knowledge including other successful recoveries and best practices.
- Responsiveness to business: Set a new standard in exceptional Municipality-to-business/industry engagement; two-way collaboration and support. Align requirements for the region's rebuilding and recovery efforts with local workforce skills and training.
- Relationships and Partnerships: Work collaboratively and focus on inclusivity. Respect that everyone is a partner and/or potential supplier in the economy. Function as a region and incorporate the needs of the entire community including Metis, First Nations and rural populations.
- Regional in scope: Function as a region incorporating the needs of the entire community, including Métis, First Nation and rural populations.
- Resilient mindset: Integrate business and economic resiliency best practices; integrate what was learned into all strategic and future planning efforts.
- Reinvent and Reposition the RMWB: Recognize and capitalize on the new normal, incorporating diversification, innovation, and world-leading practices into the rebrand. Proudly own the community's tenacity, passion, and entrepreneurial spirit as part of the unique strengths that bind and anchor this region.

Hit the 'reset' button – to take time to build a solid, operational foundation that will support strong, sustainable economic growth.

iv. Recommendation Overview by Timeline

The following is a visual representation of key recommendations and timelines as outlined by the EOAT.

Short-term:

(June 2017 + up to one year)

- Address the immediate barriers with insurance, permitting, inspections, local procurement, regulations
- Integrate additional content in business license process (e.g. NAICS code)
- Clarify regular vs. recovery operations and integrate as soon as possible
- Develop quick response trades training for rebuild
- Advocate for clearing of dangerous wildfire debris in rural areas
- Identify a short-term regional vision to drive initiatives through development of various economic development strategies and tactics
- Embrace cross-jurisdictional collaboration and increase outreach to rural areas

Medium-term:

(June 2017 + 1-2 years)

- Continue to develop and provide a system of business supports with various community partners
- Incorporate meaningful ongoing engagement strategies with business and industry
- Launch a Business Visitation Program; Complete a Regional Asset Mapping exercise
- Support efforts to improve child care access
- Complete a Regional Business Cluster Development Strategy

Note: A Regional Business Cluster Development Strategy is a logical organizing principle that enables regions to better understand their companies' competitive advantages, connect buyers and suppliers, improve productivity (and often profitability) and guide policy-makers and industry leaders on strategies for economic development.

Long-term:

(June 2017 + 3-5 years)

- Develop a community vision and brand to incorporate strengths and guide researched strategies
- Enable the community to take advantage of new opportunities, partnerships and funding programs
- Optimize R&D opportunities
- Update Land Use Bylaw and inventory of available land
- Downtown Revitalization Strategy
- Support the implementation of a Visitor Ambassador Program
- 10-Year Regional Economic Development Strategy and future delivery model
- Develop a Business Investment & Attraction Strategy

A detailed list of recommendations and suggested timelines may be found on pg. 35

Key Commitment

While the multi-faceted process of economic recovery may seem somewhat insurmountable, it is proven that a commitment to individuals, business and industry along with pragmatic planning and implementation will positively impact a community's long-term success.

II. EMBRACING THE NEW ECONOMIC REALITIES:

After The Wildfire

a. Note to Readers

As members of the Economic Opportunity Assessment Team (EOAT), we were honoured to participate in identifying the honest state of the business environment in the Regional Municipality of Wood Buffalo after the wildfire. We thank you for welcoming us into your community, and for your straight-forward feedback and honest desire to make things as good as they can be.

Through our pre-site research as well as our on-site investigations, we were stricken by not only the devastation of the wildfire but also by the significant effects of the industry downturn. It quickly became clear to us that the region was dealing with not one, but two major traumas that challenged families, businesses and the overall community in inexplicable ways.

In the aftermath of this unfortunate set of circumstances, we also observed the unique traits of the people who call the region home for work and/or play. There exists an undeniable tenacity, entrepreneurial passion and a willingness to build beyond what was. Is there still some fear? Sure. A desire for structured answers, trust and immediate solutions? Yes. But there is also brain power, human resiliency and a collaborative pride that will most certainly move this community forward.

It was our task to highlight the voice of business and, in response, present a pragmatic foundation on which leadership can base the region's solid economic recovery. It is our hope that the opportunity assessment and recommendations provided in this report will give you firm steps towards a strong economic recovery and a vibrant new normal.

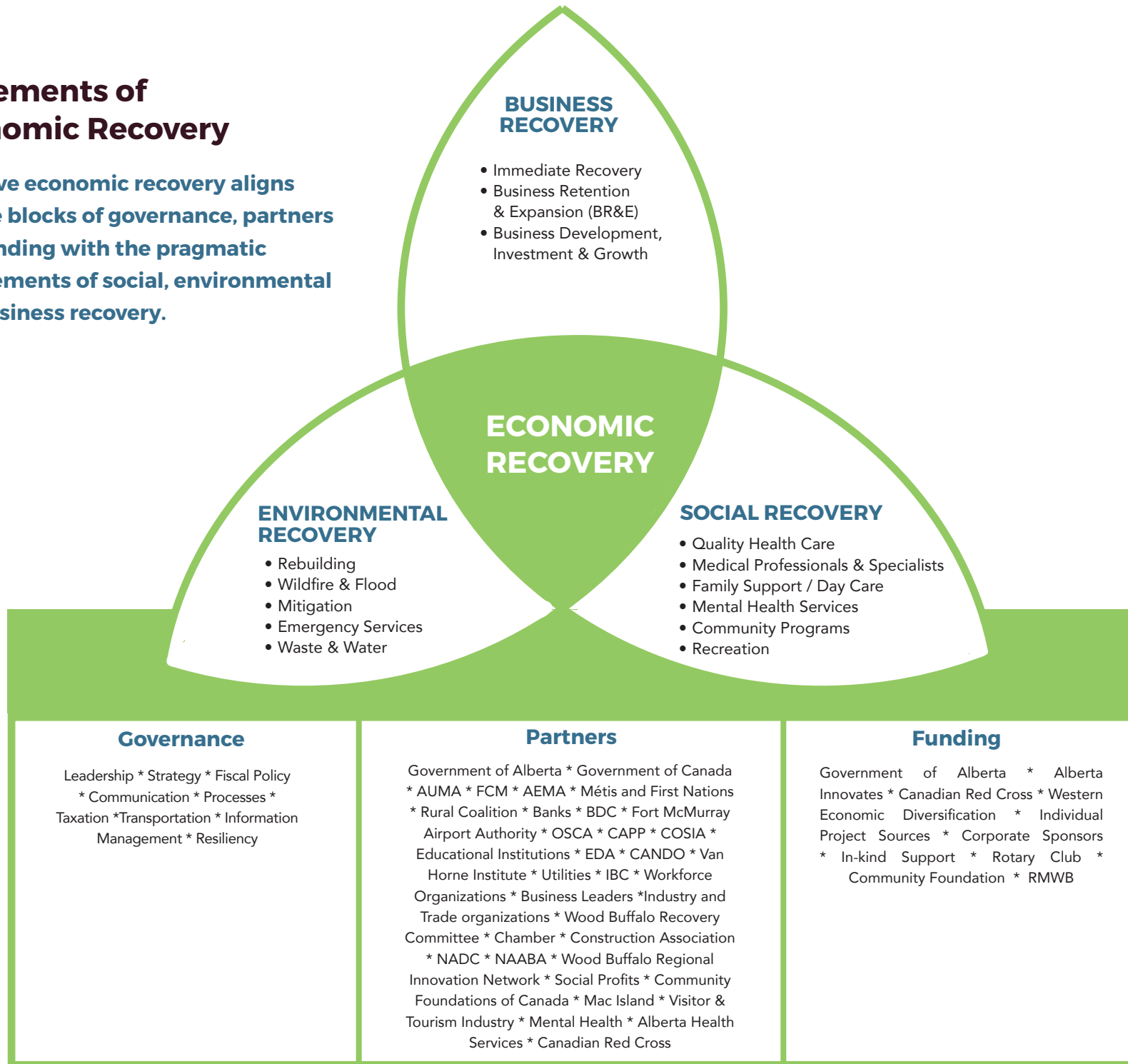
You have been heard.

The Economic Opportunity Assessment Team

We experienced an undeniable tenacity, entrepreneurial passion and a willingness to build beyond what was.

b. Elements of Economic Recovery

Effective economic recovery aligns all core blocks of governance, partners and funding with the pragmatic requirements of social, environmental and business recovery.



c. RMWB Community

There are multiple factors influencing the infrastructure requirements and economic challenges the region is currently experiencing.

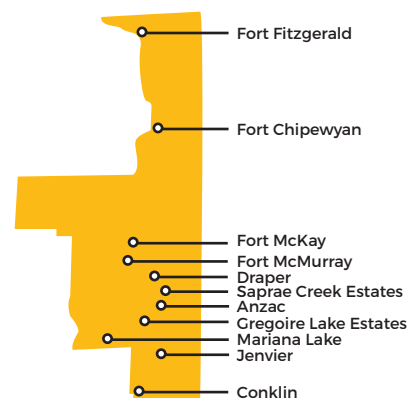
Located in northeastern Alberta, the RMWB is home to ten amalgamated urban and rural communities, including First Nation and Métis Locals. It is one of the largest Municipalities by area (63,000 square kilometres) in North America, extending from north central Alberta to the borders of Saskatchewan and the Northwest Territories. As the hub to one of the largest Oil Sands deposits in the world, the Municipality's population is distributed among nine rural communities, numerous project accommodation and camps, and the Fort McMurray Townsite (66% of the total population lives within the Urban Service Area). Also impacting the RMWB economy is the shadow population (temporary residents who work in the Municipality for a minimum of 30 days a year) totaling 43,084 living in 123 different project accommodations and camps. In 2015, the total permanent and shadow population was reported to be 125,032.

During the period of 2000-2015, the population steadily increased by 143%. In comparison to other parts of Canada, the RMWB is a relatively young community with over 55% of the population 34 years of age and younger. The largest group, aged 25-34, represents over 25% of the population.

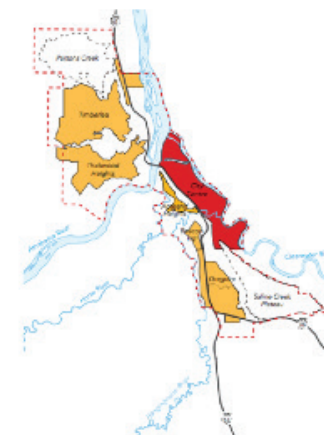
Source: 2015 Municipal Census

Note: See page 4 for additional population information.

Rural Population Pre-wildfire: 3566



Urban Service Area Population Pre-wildfire: 78,382 (66% of region)



First Nations:

Mikisew Cree
Athabasca Chipewyan
Fort McKay
Fort McMurray No. 468
Chipewyan Prairie Dene
Smith's Landing

Métis Locals:

Conklin Métis Local 193
Willow Lake Métis Local 780
Fort McMurray Métis Local 1935
Fort McMurray Métis Local 2020
Fort McKay Métis Local 62
Fort Chipewyan Métis Local 125.

III. THE ECONOMIC ASSESSMENT

The Parallel Need: Rebuilding Structures And Neighbourhoods. Revitalizing Business And Local Economies.

In dealing with the wildfire, the RMWB (as per most Canadian communities) did not have an approved post-disaster economic recovery plan articulating best practices for getting the local economy up and running after such a significant economic disruption. While a Municipal Emergency Plan (MEP) forms the centerpiece of Municipal emergency preparedness and response in Alberta, department-specific recovery plans are often lacking.

Typically, when disaster strikes, the services of first responders are critical. Police, wildfire, emergency and military personnel are deployed immediately to restore order and deliver critical resources to the crisis at hand. Immediate efforts appropriately center around the affected individuals and families, buildings and infrastructure.

As many first responders leave and communities begin “getting back to normal,” attention must then be given to how the disaster has affected businesses and their ability to compete. How do community leaders create and implement effective economic recovery efforts? How do they best support their local business community? How can they better position themselves to inform investors that the region is still an attractive place to invest?

Answers to these questions and more quickly became pivotal to the RMWB. With immediate recovery activities in place, focus needs to turn towards further understanding short, medium and long-term business needs and to creating relevant strategies and tactics that could accelerate the region’s economic recovery. Business and economic recovery must begin prior to investment attraction activities.

EOAT Model:

This team concept was originally developed by the International Economic Development Council (IEDC) to connect the growing body of knowledge, best practices and relevant case studies found within the economic development field to accelerate a community’s long-term recovery and resilience. The key objective of an EOAT visit and stakeholder engagement process is to determine the overall health and vitality of a business community post-disaster.

a. PROJECT MANDATE

Understanding the Needs of Business

Communities affected by disasters move from response to recovery by addressing permanent infrastructure repairs and by rebuilding or repairing homes. The role of economic development is to focus on meeting the needs of its business community. This is done by developing a renewal plan to accelerate economic recovery while re-evaluating existing policies and strategies that may be hindering economic recovery efforts.

Specific objectives included:

- Gathering in-depth information on the current economic situation from the community utilizing a variety of focus groups, stakeholder meetings and one-on-one interviews with stakeholders and the business community;
- Accessing unbiased expertise in disaster recovery as it relates to economic development;
- Better integrating resilience into Municipal programs;
- Gathering qualitative information from key community stakeholders and business owners on pre-existing conditions prior to the wildfire, direct and indirect impacts, actions taken to date, and identification of resource gaps/needs;
- Identifying potential opportunities for future action to assist the Municipality with its immediate, short, medium and long term economic recovery efforts.

From the work completed by the Wood Buffalo Recovery Hotline during the period May 30 - August 31, 2016, we know that of the 4,100 registered businesses, 92.9% laid-off or terminated employees after the wildfire, and over 44% did not have business insurance. These are just two examples that highlight the community's need to address business recovery as part of its overall economic recovery.

The goal of this Economic Opportunity Assessment is to assist the RMWB in understanding and prioritizing its key business and economic challenges, as well as identify opportunities that could improve the region's economic outlook moving forward.

***During the period
May 30 - August 31,
2016, 92.9% of the 4,100
registered businesses
laid-off or terminated
employees.***

b. THE TEAM

Tailoring Broad Experience Specifically for RMWB

As requested by EDB, the EDA invited ten external, unbiased and highly-skilled professionals to lead and participate in this critical data-gathering initiative. These individuals are noted for their 'on-the-ground' recovery experience throughout North America involving floods, hurricanes, and wildfires. This expert team brought vast knowledge to the RMWB and strengths in: entrepreneurship, energy, international trade, investment, technology, food and agriculture, Indigenous affairs, environmental stewardship, transportation, workforce and community development, resiliency planning, project management and overall economic recovery.

Economic Opportunity Assessment Team Members:

Alberta-based Economic Development Professionals



Leann Hackman-Carty,
Economic Developers
Alberta (Calgary, AB)



Natalie Gibson,
InnoVisions and Associates
(Airdrie, AB)



Daniel Hobson, Lloydminster
Economic Development
(Lloydminster, AB)



Angela Groeneveld, Town
of High River
(High River, AB)



Kent Rupert, Airdrie
Economic Development
(Airdrie, AB)



Larry Wright, Town of Olds
(Olds, AB)

First Nation, Métis and Rural Economic Development Professional



Ray Wanuch, CANDO
(Edmonton, AB)



Danielle Lightning,
CANDO (Edmonton, AB)

Economic and Business Recovery Experts



Mickie Valente, IEDC
Expert & FEMA Volunteer
(St. Petersburg, FL)



Charles Wemple,
Houston-Galveston Area
Council
(Houston, TX)

Based on their professional expertise and background, each team member worked with a specific focus stream:

- 1. Municipal leadership:** Internal Municipal departments, Council, Wood Buffalo Recovery Committee (Leann, Mickie)
- 2. Stakeholders:** Industry associations, business support groups, social profits (Natalie, Larry, Charles)
- 3. Business:** Individual business interviews (Kent, Dan, Angela)
- 4. Rural and Indigenous:** First Nations, Métis, rural business interviews (Ray, Danielle)

c. METHODOLOGY

Getting to the Core of the Matter

Standard Practice

Typically, an EOAT visits a community post-disaster to obtain specific information and feedback through various types of stakeholder engagement strategies. Primary research is gathered and then supplemented with relevant secondary research the community has completed. The information is further enhanced by the team's previous experience and expertise and then incorporated into recommendations targeted to improve the community's overall economic recovery.

RMWB Consultation

Questions and discussion topics were customized to the focus and needs of the stakeholder group. In each case, conversations were adjusted as necessary in order to attain the most relevant and timely information that would, in turn, be used to guide the recovery strategies. As it was key to gather unbiased and unrestricted details, all stakeholders and interviewees were assured confidentiality and privacy.

This methodology provided the EOAT with much more substantive content than a standard survey. While an interview sample of 207 (of 3,900 businesses) is neither statistically reliable nor unbiased from a pure market research perspective, it does represent some valuable stakeholder viewpoints.

The Economic Opportunity Assessment engaged four stakeholder streams: Leadership, Stakeholder, Business, and Rural/Indigenous.

After the 2013 floods in Southern Alberta, EDA recruited and lead EOAT's into eleven distinct disaster-affected communities. That experience reaffirmed how valuable the research, perspective and professional knowledge of EOATs can be in advancing economic recovery.

d. ENGAGEMENT PROCESS

Accessing the Voice of Business

It is important to note that the EOAT focused its efforts on identifying challenges, opportunities and recommendations directly related to economic development, economic recovery, and sustaining a healthy business sector.

In Preparation:

- EOAT members reviewed a number of relevant reports and studies that had been completed for or approved by the RMWB

Note: Finding valid, reliable, current data and information sources was a challenge for the team as several diverse organizations were conducting research within the region post wildfire. At least 41 studies on the RMWB were underway or completed with little or no common knowledge of their scope or potential alignment. This further highlights that, in the absence of an overarching community vision, individualized tactics emerge, wasting or duplicating valuable resources.

- EDA worked closely with the RMWB to identify and organize customized meeting schedules for each of the four streams
- Local experienced Indigenous stakeholder, Mr. Bryant Fayant was engaged to help arrange additional meetings

January 23 – 27, 2017 Consultation:

- Initial briefing by the RMWB and members of the Wood Buffalo Recovery Task Force
- EOAT tour of the community
- Independent, confidential meetings with targeted stakeholders representing four interest streams:
 - Total of 125 one-on-one business interviews
 - 31 community organizations
 - 27 individuals in civic leadership roles and
 - 24 rural stakeholders

In total, 207 individuals were engaged from business and social organizations, industry and government including the Business Support Networking (BSN) group.

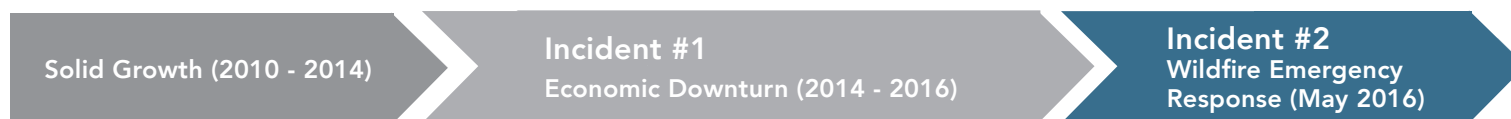
- Before leaving the community, the EOAT briefed the RMWB on its overall findings, and presented them with the following list of immediate recommendations (see page 35)

Post-Site Engagement:

- Subsequent review of business stakeholder feedback.
- Additional telephone interviews were conducted to confirm key findings, clarify content and identify further additional best practices.
- Development of written report including identification of key challenges and pragmatic recommendations.

e. STEPS FROM RESPONSE TO RECOVERY

Multiple factors impacted the economic health of the region before and after the wildfire. The following timeline outlines some of the notable events and statistics as well as past, current and potential economic recovery action steps.



Solid Growth 2010 - 2014

- Four years of continual economic growth largely due to progressive Oil & Gas industry
- Residential Rental Vacancy Rates at 11.4% (2014)

Wood Buffalo Unemployment Rate at

4.8 % (2012)
3.1% (2013)
3.8% (2014)

Economic Downturn 2014-2016

Sharp decline in global crude oil prices significantly impacts oil and gas industry and, therefore, the RMWB economy.

Energy companies announce major cuts to their investment and drilling plans. Layoffs ensue between 2014 - 2016.

January 2016: Oil prices down 73%; Dropped from \$106^{USD} to \$27^{USD}.

- Industry publicly challenges Municipality to reign in spending given new economic realities.
- In 2015, RMWB cuts \$80 million from its Municipal budget, including a \$39 million waste water treatment plant.
- Average House Price decreased 20%
- Residential Rental Vacancy Rates increase to 29% (October 2015)
- Wood Buffalo Unemployment Rate jumped to 7.6% (2015)

Source: Conference Board of Canada, Wood Buffalo Semi-Annual Economic Outlook, May 2016

Incident #2 Wildfire Emergency Response (May 2016)

Wildfire; Immediate Response May 2016

May 1

Local state of emergency declared

May 3

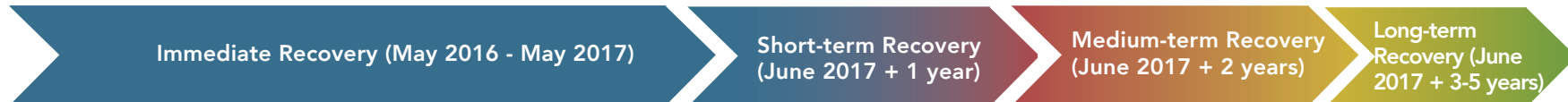
Mandatory evacuation order was issued

May 4

Government of Alberta declared a provincial state of emergency

More than 3900 local businesses impacted

- Approximately 88,000 people were successfully evacuated
- 1595 structures destroyed: 2,579 dwelling units
- Almost, 20,000 people applied for EI



**Business and Economic Recovery
May 2016 - May 2017**

May 24

- Business and Economic Recovery Plan approved by Council

May 30

- Wood Buffalo Business Recovery Hotline opens (and stays open until August 31, 2016)

June 1 -15

- Phased re-entry plan takes place for residents

June 2016 - January 2017

- * YMM Welcome Walks * Ask an Expert Program * Learning Events
- * Back to Business Coaching Program * Business Support Networking (BSN) * YMM Home Shows/Expos Job Fair * Back to Business Resource Centre
- RMWB’s Small Business Workforce Support Program injects Part A funding (\$4.5M of \$15M) into business community

January 22-27, 2017

- EOAT on-site assessment stakeholder interview process- immediate recommendations around insurance, business supports and communications.
- Wood Buffalo Recovery Task Force conducts business needs assessment

February - March, 2017

- Insurance Bureau of Canada (IBC) meetings with business owners/ residents
- YMM Home Show and Job Fair

April 2017

- Draft EOAT report provided to RMWB
- Canadian Red Cross Support to Small Business Program injects \$28.5M into local business community.

May 2017

- RMWB’s Business Startup Guide released
- Back to Business Resource Centre transitions to a permanent location and called “Business Resource Centre”

Business and Economic Recovery

June 2017 Final EOAT report presented recommending an initial short term focus on internal Business and Economic Recovery and Business Retention & Expansion efforts.

Business and Economic Recovery

Primarily an internal focus on outreach to existing businesses, regional asset mapping and business cluster development.

Business and Economic Recovery

Business and Economic Recovery
Supplement existing BR&E work with an overarching community vision and brand, from which a 10-year regional economic development strategy and delivery model can be developed, and drive revitalization, business and investment attraction activities.

Canadian Red Cross Support to Small Business Program injects \$28.5M into local business community.

IV. ECONOMIC ASSESSMENT FINDINGS

A. STAKEHOLDER GROUPS INTERVIEWED

Overview of business, Municipal and stakeholder groups interviewed:

- One-on-one business interviews (Fort McMurray based, and throughout the region (Metis, First Nations))
- Canada’s Oil Sands Innovation Alliance (COSIA)
- Canadian Red Cross
- Community Futures Wood Buffalo
- Financial Institutions (Focus Group)
- Fort McMurray Chamber of Commerce
- Fort McMurray Construction Association
- Fort McMurray International Airport
- Fort McMurray Real Estate Board
- Fort McMurray Tourism
- Government of Alberta: Recovery Task Force, Labour

- Keyano College
- Northeastern Alberta Aboriginal Business Association (NAABA)
- Northern Alberta Development Council (NADC)
- Oil Sands Community Alliance (OSCA)
- Social Profit Focus Group:
 - Arts Council Wood Buffalo
 - Borealis Counselling Services
 - Centre of Hope
 - Early Years Coalition
 - FuseSocial
 - Northern Lights Health Foundation
 - SPCA Alberta
 - Fort McMurray United Way
 - Justin Slade Youth Foundation
 - NGO Coordinator for the

Recovery Task Force

- Waypoints
- Wood Buffalo Food Bank
- YMCA of Northern Alberta (Wood Buffalo Region)
- Urban Development Institute (UDI)
- Wood Buffalo Recovery Committee

Indigenous Businesses and Stakeholders:

- Athabasca Chipewyan First Nation
- Athabasca Tribal Council
- Chipewyan Prairie Dene
- Conklin Métis Local 193
- Fort Chipewyan Métis Local 125
- Fort McKay First Nation
- Fort McKay Métis Local 62
- Fort McMurray No. 468
- Fort McMurray Métis Local 2020

- Infinity Métis Corp
- Mikisew Cree First Nation
- Willow Lake Métis Local 780

The Regional Municipality of Wood Buffalo:

- Community Services
- Emergency Management
- Engineering
- Industry Relations
- Land Administration
- Métis and First Nations Relations
- Planning and Development
- Supply Chain Management (Social Procurement)
- RMWB Council & CAO
- Waste Management

B. STAKEHOLDER FEEDBACK

This section reflects the actual feedback attained through 207 stakeholder interviews and captures specific comments and concerns based on real, existing perceptions and the knowledge base as of January 2017. Those who felt passionately about an issue were able to express freely, in their own worlds, without judgement.

While some statements may appear to be subjective, they are true reflections of what was heard by the third party interviewers. As such, the Municipality and all stakeholders are encouraged to take this input seriously, addressing challenges or seizing opportunities when and where possible.

Note: In focusing on a needs/solutions approach to the information gathered, the EOAT has formulated an extensive list of suggested actions found in Recommendations on page 35, that will assist the region in advancing their economic recovery.

i. RMWB Governance / Process

Overview:

The perceived lack of community vision, cooperation and cohesion negatively impacted the overall trust stakeholders had in the RMWB. The Municipality was perceived to be large and divisional, creating barriers and unnecessary red tape that impeded business recovery, time, incomes and goodwill between the Municipality and businesses. Inadequate and ineffective communication from the Municipality regarding processes and procedures caused frustration. For example, three streams of funding programs and delays in programming.

- Local procurement and supply chain issues
- Permitting/inspections
- Lack of trust or lack of leadership
- Communication
- Departments or recovery in silos

Specifics:

- Business felt there was a lengthy lag time between permit applications and approvals; need streamlined, efficient processes
- Lack of practical processes and regulations for rural businesses (eg: regulations for trappers' cabins)
- Ongoing conflicts between Planning and Inspections re. time delays and information
- Disconnect between RMWB departments forcing unnecessary repeat visits and additional time/costs
- Businesses expressed concerns that local procurement and supply chain processes don't allow for fair competition and open bidding by regional companies
- Majority of those interviewed did not feel business was a priority to the RMWB; feeling of alienation. Need for a 'business-friendly' Municipality
- Disparity between short and long-term planning activities
- Lack of inter and intra-departmental trust and connection
- Lack of overall community vision at macro level to drive strategies and plans
- Need for: Bill 21 Strategy, 10-year regional economic development strategy, cluster development strategy, and economic preparedness plan
- Lack of consistent multi-level governance and coordinated efforts; operating in silos
- Enormous lack of two-way, accurate, clear, consistent communications on multiple subjects; generally poor communication between Municipality, local and external groups
- No single source of reliable, updated information; no cross-jurisdictional baseline information
- Lack of suitable access to information; need consideration of restrictions
- Lack of 'open for business' marketing; communication of successes within various audience groups
- Limited or non-existent internet access or cellular phone service restricts access to information re. available support. RMWB outreach poor
- Lack of understanding between recovery and normal operations

ii. Insurance

Overview:

For many businesses, a decision on whether or not to continue operations after a disaster usually happens within the first six months. Preparing for this risk is an important element to consider when businesses are buying insurance products.

In the case of the wildfire, the economic hardship experienced while companies waited for an insurance settlement was significant. Some companies had exhausted all financial supports, including their savings and lines of credit. Fortunately, financial institutions were quick to raise the red flag that resolving this issue needs to be a priority. Still, however, there remains a high risk of more financial bankruptcies within this calendar year.

- Policy interpretation and clarity
- Challenges to settle claims
- Lack of proper insurance
- Confusion or lack of response from insurance

Specifics:

- Insurance issues including no insurance or sub-par insurance; inadequate access to information
- Confusion with interpreting policies and benefits
- Disparity over settlement amounts
- Realities of inadequate, insufficient or inconsistent policies for individual businesses
- Lack of response from insurers
- Lack of business interruption insurance

iii. Real Estate

Overview:

Economic recovery in the downtown has experienced under-utilized real estate (due to changed administrations and priorities) and impacts from the 2014-16 downturn. While real estate issues were not prevalent issues for rural areas, regulations and taxation rates were common problems outside of the Urban Service Area.

- High rent and lease rates
- Landlord issues
- Lack of affordable commercial/industrial space

Specifics – Urban:

- High lease rates; landlord/tenant issues
- Little availability of affordable commercial space within Urban Service Area
- Empty downtown; no vitality; stalled development; lack of primary businesses or attractions to draw people into the downtown. A weak downtown core not only impacts nearby businesses but the entire jurisdiction as well

Note: It was suggested that while past Councils made several overtures to deal with downtown development, all plans had been abandoned.

- Very few landlords have decreased their lease rates post wildfire
- Need for innovative planning with multi-use developments; more commercial integration into residential developments so people could work closer to home
- High cost of new infrastructure.
- Perceived shortage of shovel-ready industrial land (pre-wildfire to now)

Note: The RMWB is currently completing a Commercial Industrial Land Use Study and Retail Market Analysis which will hopefully provide additional insights. This content will be valuable to the Planning and Development Department as well as the Engineering Department as they consider a range of commercial and industrial space options in the years to come.

Specifics – Rural:

- Land accessibility: Hard to rebuild log cabins on trap lines because logging companies take from cut blocks; hard for local people to access commercial/industrial land
- Regulations: Too many bylaws and restrictions. RMWB requires trappers to apply for a business license. Communication as to the purpose of this is unclear to trappers.
- Taxation: Pay high taxes for minimal services. Costs are high to live in rural areas. Community can't support the young or old.

iv. Business Supports

Overview:

Due to the economic downturn, many of those interviewed had experienced a significant drop in revenue prior to the wildfire. This situation was, of course, only compounded after May 2016 and in January of 2017, stakeholders conveyed a 'new level of stressed.'

Determined and entrepreneurial in approach, business owners are eager to build their business skills and re-tool for the new economy, some business owners are actively seeking training as well as Business to Business (B2B local, external) Business to Government (B2G) and Business to Consumer (B2C) marketing support.

Specifics:

- Lack of awareness re: RMWB and Canadian Red Cross Small Business Financial Support programs, Back to Business Resource Centre (BBRC) and the Certified Management Consulting (CMC) coaching program
- Better coordination/communication between volunteer, public and private sectors required
- Confusion re. who was eligible for what with Red Cross Phase 2/3 funding
- Perceived lack of funding for self-employed business owners with no employees
 - Note: RMWB has a significant number of self-employed, small business owners*
- Disconnect between region's needs and business offerings
- Little understanding of industry's priorities
- Lack of individual business owners' 'solid grasp' of their own product/service concepts, target market, capacity and competition
- Need for specific marketing of local products and services within region and across supply chains
- Businesses wanted more training, mentoring and coaching tools; support in entrepreneurship, marketing, communications and financial management
- Limited BR&E efforts in community

v. Workforce

Overview:

There is an obvious ripple effect from the workforce skills demanded by the region's major businesses throughout their supply chains. Anticipating and preparing for the skills that will be in demand tomorrow should be paramount.

Specifics:

- Industry advised that in order to save money, they are minimizing the number of staff living onsite
- Potential decrease in fly-in fly-out staffing approach could result in significant drop in shadow population
- There was apparent confusion over the benefits of the East Clearwater Highway. Specific discussion with all involved stakeholders is required
- Capabilities of available workers don't match required positions/skills
- Significant loss of entry-level, hospitality and service industry workers impacting hours of operation and revenues
- Loss of professional services, particularly doctors and medical specialists; impacts the practicality of living in the area for the growing young families
- Training programs at Keyano College aren't necessarily addressing current or future workforce needs; referenced examples were mechanics, child care and health care
- To some, the Municipality's hiring of local Indigenous people is inadequate. A need for better outreach and recruitment of talent with the Indigenous communities was identified
- Increased use of automated vehicles could further decrease the number of staff working in the camps in the future

vi. Market Access

Overview:

Market access issues were primarily related to the cost of doing business in a northern community and taxes in other competing jurisdictions affecting businesses revenue. Comments were somewhat divided between a feeling of fair market access versus a feeling regional companies did not have enough experience or capacity to supply services in the region.

Outside the Urban Service Area, the rural and indigenous business community felt they were being overlooked in relation to providing services to the Municipality.

Specifics:

- Procurement of products and services; offering local businesses fair market access to Municipal contracts
- Rural and indigenous business community felt overlooked in providing services to RMWB. Overall, Indigenous people feel under-utilized and can provide much more than they are currently providing with respect to products and services. Need access to markets and contracts

Note: RMWB's new Social Procurement Policy could potentially help lessen or resolve this challenge

- No comprehensive list of economic assets

vii. Social Impact

Overview:

Workplace burnout, availability of certified caregivers and daycare options, and mental health issues are significant socio-economic challenges having a real impact on economic recovery. These issues are further compounded by burn-out within this key sector and a perceived diminished number of health and wellness personnel overall.

Specifics:

- Growing lack of health care professionals and out-migration of doctors is a quality of life indicator that influences whether a business (and residents) stays or invests
- Need practical resources and strategies for personnel burn-out
- Business community requires more suitable child care options; needs for quality child care can range dramatically both in hours of service provision and location. We heard conflicting perspectives on the severity of this issue. Research and confirmation of factual numbers so that appropriate planning can take place

viii. Economic Impact

Overview:

Critical pre-existing conditions of the region weighed heavily in all of our interviews. In some cases, the business community was already adapting by diversifying its services and seeking outside partnerships to build capacity; however, in other cases, business owners reported either a lack of business skills or capacity to even know where to start.

Some companies reported revenue losses anywhere between 30-50% prior to the wildfire. At the end of January, others had yet to generate any revenue in 2017.

Specifics:

- Lack of immediate cash flow – first six months

Note: Financial institutions confirmed they had already been working with many clients to manage their cash flow prior to the economic downturn. Had Phase 1 emergency relief for business been higher in the beginning, it could have helped business owners make better decisions and feel less vulnerable while doing so

- Overall, there was a need for the business community to understand the current and future market demands as well as their capacity to handle requirements, small or great. They also identified a need to business supports to assist them with marketing advice and training.

Rural Business Community:

- While several people in rural communities 'felt this was their home and they weren't going anywhere,' many Indigenous businesses were struggling to sustain themselves even prior to the wildfire
- The post-wildfire landscape is dangerous for trappers
 - Loss of quarry for trap line by surrounding industry; interferes with hunting, food security, wildlife sustainability, etc
 - Lack of sufficient cleanup; dangerous landscape for trappers; partially burnt stumps and debris remaining throughout forest
- Perception that self-employed with no employees in rural areas did not qualify for funding
- Limited or non-existent internet access or cellular phone service restricted access to information re available support. RMWB outreach poor.
- Limited internet/broadband is a larger infrastructure issue

ix. Business Resiliency

Overview:

Business resiliency refers to the ability of a business to quickly adapt to disruptions and maintain continuous business operations while safeguarding people and assets. It goes beyond disaster recovery by offering strategies to help avoid costly downtime, mitigating vulnerabilities and maintaining operations in the face of unexpected challenges.

Resilient businesses have a number of elements in common, including the priority given to developing a continuity of operations plan. Only a handful of the businesses interviewed had an operations plan with a business continuity plan which would have included prioritization of their most crucial functions and systems.

Gaps were even more evident in the rural business interviews.

Specifics:

- Lack of resiliency understanding, strategy, training etc. so that businesses could mitigate risk and better prepare for the unforeseen
- Businesses eager to learn how to diversify market product base and market outside the region. Education required
- Lack of vibrant downtown core negatively impacts adjacent businesses. Require commitment to revitalization plan
- Lack of interruption insurance, no emergency plans

V. SWOT

This SWOT analysis outlines the Strengths, Weaknesses, Opportunities, and Threats of the RMWB. While the 'Challenges' and 'Recommendation' sections of this report reflect specific feed-back and responding opportunities, the SWOT represents the higher-level facts and views gained through the EOAT's assessment. The details within the SWOT will serve as valuable positioning points for both the RMWB's future economic development and brand strategies.

Note: This SWOT is based on input from participants of cross-sector focus groups and business interviews, vs. the community at large.

STRENGTHS

Factors or assets of a community that can be utilized to capitalize on future growth opportunities and create community capacity.

- An established urban business sector that supports industry and community needs
- Strong, entrepreneurial and innovative attitude throughout region; 'can-do,' pioneer approach
- Determination to succeed post downturn and wildfire; eagerness to move from Response to Recovery to Resiliency
- Industry participation in promoting and supporting regional socio-economic development
- World-leading Oil & Gas innovation, technologies and research; reclamation, environmental stewardship as well as exploration and production; high level of professional expertise
- Innovative advancements in Municipal green initiatives; waste management, Cleantech, EcoPark, potential manufacturing and sale of recycled materials
- History of community volunteerism; generous personal and corporate philanthropy
- Young, energetic population; eagerness to commit to career, business development and community recovery
- Established market ties to major centres; including Edmonton and Calgary
- International Airport that supports basic local, regional and industry needs
- Post-Secondary education and research institution: Keyano College
- 4 public school districts: Public, Catholic, Francophone and Rural Northland School Division
- Northern Lights Regional Health Centre
- Rich heritage; diverse, Indigenous culture
- Average household and discretionary incomes are higher than the national and provincial averages
- Relaxed lifestyle, quiet country living; natural environment
- Quality recreational opportunities (parks, playgrounds, fishing lodges, football, interpretive trails, green space, extreme sports, kayaking/canoeing, lakes, skiing, snowboarding, swimming, hockey, curling, racket sports, golfing, baseball, soccer, lacrosse, rugby, badminton)
- First-class amenities; e.g. Syncrude Athletic Park, MacDonald Island Park recreational, leisure and social centre with 50,000 sq. conference/banquet facilities for special events, concerts, conferences, galas, meetings, trade shows
- Art gallery, public library, museums, theatre

WEAKNESSES/CHALLENGES

A disadvantage that may impede community growth opportunities. Weaknesses should be addressed to sustain a prosperous community.

- Wildfire on the heels of economic downturn; insufficient time to adjust prior to wildwildfire
- Need for current studies and plans that address: 1) Business and Economic Recovery 2) Business Retention & Expansion 3) Business Development & Economic Growth
- Lack of cross-jurisdictional, cross-sector engagement and alignment of processes
- Ongoing business challenges re: insurance, permitting, inspections, local procurement, regulations, communications and rural relations
- Bottlenecks in communication, policies and processes within the Municipality that inhibit business
- Low attraction/retention of medical and health care professionals/specialists
- Lack of business continuity planning; emergency preparedness
- Lower population than pre-downturn; negative trickle-down impact on economy
- Compromised work force; many entry-level workers not returning to region
- Lack of appropriate child care
- Under-served rural communities; individuals and businesses not afforded same opportunities as urban communities, limited transportation, direct communications, and engagement
- Mental health issues – PTSD post economic downturn and wildfire
- Little positive positioning of RMWB strengths and attributes pre-crisis; no identified 'need' for such previously
- Many studies being conducted, no collaboration of the data, no tracking of outcomes
- Businesses may or may not be aware/prepared for the economic reality of the new normal

OPPORTUNITIES

Factors that may can help move a community forward. Their actions can help impact the opportunities.

- Re-building, repositioning of regional vision and brand (strengths and attributes); integration and marketing thereof
- Fly-in fly-out customer base; potential provision of customized products and services to this unique population
- Opportunities for major employers to present a list of their unique supply/service needs to regional businesses in order to see if they can be matched locally
- Development of Airport lands
- Airport connectivity and business access to people and markets around the world
- Independent local power utility
- Quality of life enhancements
- Economic diversification; capitalize on brain trust and entrepreneurial nature of region
- R&D; RINSA, Oil Sands research, innovative technologies
- New commercial/industrial/rural development

OPPORTUNITIES (cont'd)

- Creation of a Wood Buffalo Community Foundation for future community development, recovery and resiliency initiatives
- Optimized workforce development and training
- Resiliency and preparedness planning; training, lessons learned, best practices
- Specialized workforce programs: Entrepreneur Centre/Start Up Incubator, enhanced programming at Keyano College, skill development, retraining
- Improved communications infrastructure and implementation throughout the region
- Private public partnerships, support opening of critical infrastructure and key resources owned or operated by the private sector, better use of resources
- Opportunity to rethink the RMWB budget, information updates for business on Bill 21 discussions, different taxation system for rural businesses
- Greenhouse innovation; food security and availability
- Repositioning of region's environmental stewardship; mitigation of global perception
- Tech automation may drive efficiencies and new industry advancement
- Advances in technology and innovation in all sectors can be leveraged and expanded

THREATS

External factors that present challenges or impede opportunities.

Threats must be considered when developing economic development strategy.

- Intergovernmental jurisdictional issues; lack of alignment and identified responsibility stalls progress, costs businesses time and money
- Bill 21; pending changes to small businesses and residential taxation
- Commodity-driven economics; potential further downsizing of industry; significant impact on region
- Economic decisions made outside the region (e.g. oil companies deciding when to expand and contract)
- Business uncertainty: unpredictability of business/service requirements; unknown number of returning customers
- Impact of automation on employment/workforce requirements and retraining
- Negative local and global perceptions re. Oil Sands projects and industry impact on environment; public out-cry pre and post wildfire; all influence investment, business growth/sustainability, choices to live and work in region
- Internal and external perceptions that flood/wildfire mitigation plans are not yet adequate or complete
- A slow recovery and rebuilding process

VI. BUSINESS & ECONOMIC RECOVERY BEST PRACTICES

Disasters are testing the resilience of regions and communities across North America. Whether the cause is a natural disaster, an industrial incident or a global economic downturn, these challenging experiences provide many lessons and best practices that can not only lead to reopened businesses and recovered industries, but to stronger communities with more competitive economies.

Emergency responders generally refer to four phases of a disaster: prevention/mitigation, preparedness, response and recovery. This model can also be used to understand how communities experience and manage an event that causes a major economic disruption. While the model's four phases imply specific timelines for each, communities that have experienced major economic disruptions, particularly those triggered by natural disasters, understand these phases and their related milestones often overlap.

Economic resiliency, renewal and competitiveness are inextricably connected. Each depends on the underlying health of individual businesses, and the ability of a community to be nimble and timely in its response to meeting their needs. They also require a community to maintain focus on developing diverse industries; prioritizing long-term efforts on expanding markets; retaining and building a workforce that has the skills to fill industry needs; and providing services to support commercial growth; all while ensuring its quality of life will remain attractive to future residents.

Economic recovery starts the first day of response by assessing immediate impacts to businesses and addressing their needs, including the workforce that supports them. Decisions made during this initial phase can have significant, long-term effects on how well the community's businesses and economy ultimately recovers.

Disaster preparation builds resilience into the community. Without it, important decisions are made under the duress of the catastrophic event. Communities cannot afford to lose core businesses that supply its essential services and products. These small retailers and service providers often compose a significant portion of the local employment base, providing job opportunities

and tax revenue.

Good Governance will make or break successful economic recovery. Strategic, transparent civic leadership directs strategies and policies to integrate responses to social, economic and environmental issues.

In reality, very few communities have post-disaster economic recovery plans in place that articulate how they will best get their local economy up and running after a significant economic disruption. Luckily, there is a growing body of knowledge, best practices and relevant case studies that can be accessed and adapted from the economic development field. One specific model, developed and implemented by the International Economic Development Council (IEDC), utilizes external Economic Opportunity Assessment Teams (EOAT).

Over the past twenty years, IEDC has utilized EOAT's in disaster-impacted communities throughout the United States, and more recently in Canada. Their basic premise is to take advantage of specific expertise and knowledge that economic development practitioners have gained from recovering their own economies, through volunteering their time and energy to share this experience with others. Most have been "in the same shoes" as the affected community at some point, and have had to deal with crises, failures and success. They know how overwhelming it can be and want to help. Some have lived through one disaster, while others have lived through twenty or more. These practical, unbiased, third-party advisory teams are extremely helpful for economic developers as they begin to position their community for a "new normal."

VII. RECOMMENDATIONS FOR ECONOMIC RECOVERY

a. Opportunity Overview

Resiliency Methods

As the RMWB looks to integrate economic resilience methodologies in its internal planning processes, it should commit to doing so as an iterative process that responds to change. Resilience is an ongoing awareness of strengths and weaknesses that requires up-to-date knowledge, procedures and assets. This awareness needs to be followed with action. Communities that make static plans, place them on a shelf, and refer to them later are generally less resilient than those who proactively update protocols and keep abreast of evolving vulnerabilities. The EDB should target locally based businesses when creating programs to address resiliency. It can help them develop continuity plans, obtain primary insurance support, and engage them as essential participants in developing future business response and recovery partnerships.

Business Retention and Expansion (BR&E)

BR&E should be addressed before any new investment attraction efforts take place. Existing businesses are the ones that are most likely to rebuild the economy; therefore, programs and policies supporting new business development and entrepreneurs need to be established first. Not only will these programs complement BR&E efforts in the community, but they are also likely to spur job growth and private investment in the community.

Economic Diversification and Partnerships

Part of the diversification process involves identifying potential partners, examining existing industries, figuring out what they need for expansion,

evaluating the current and future workforce needs and completing a comprehensive business cluster analysis. This analysis could help the Municipality better leverage its science and technology opportunities with partners like OSCA (Oil Sands Community Alliance) and COSIA (Canada's Oil Sands Innovation Alliance).

As an example, COSIA currently has 76 active projects targeting industry solutions in four key environmental priority areas: tailings, water, land and greenhouse gases. In order to implement these projects, they are collaborating with over 35 associate members, including a range of Fortune 500 companies, innovation hubs and post-secondary institutions. Becoming more knowledgeable about the research and development (R&D) assets in the community, and potential environmental and economic impacts they could generate, would be helpful to the RMWB. For example, COSIA's new Wastewater Technology Development Centre will allow operators to test drive more technologies than each partner could do on their own while sharing associated risks and costs. An increased focus on R&D could also leverage underutilized community assets like Keyano College which is a community resource the region does not want to lose.

Market Access

Economic diversification works best in a regional setting. Economies don't operate strictly on local jurisdictional divisions. Similarly, natural disasters can't be contained within a specific jurisdiction. It is therefore beneficial to proactively take a regional perspective from the beginning. Including and involving regional players before a disaster strikes will make it easier to create task forces and recovery programs when time is a crucial factor.

Infrastructure and Streetscape Improvements

These can be a critical impetus for re-investment from developers if completed in conjunction with a revitalization strategy. Completing a Community Investment Readiness (CIR) initiative would be a valuable exercise as it would help the Municipality develop essential tools and capability to attract, receive and successfully explore future investment opportunities.

Investment Incentives

These will be needed when the community is deemed to be investment ready; however, in the meantime, there is need to build awareness about the correlation. There is a need to build awareness about the correlation between the health of small and large businesses and the level of regional well-being. Business and industry contribute to the regional economy. This needs to be included in local policy development and strategic planning efforts. While the focus has primarily been oil and gas, all businesses generate products and services for the larger economy. One organization indicated the need for incentives to reduce fly-in fly-out scenarios. This suggests a need to build awareness of why companies actually encourage their employees to reside in a community while others do not. It extends both to employee health and safety issues as well as economic realities. Seeing the fly-in fly-out issue as an opportunity instead of a challenge would be more beneficial to the community.

b. Recommendations and Proposed Timelines

The recommendations listed below are ‘action items’ responding directly to the ‘challenges/issues’ expressed by community stakeholders. While not intended to exist as the overarching economic development strategic plan, these pragmatic steps outline the key go-forward items that will be key in the ultimate economic recovery of the RMWB.

Following a typical categorization of successful economic recovery, the recommendations are outlined as:

1. Business and Economic Recovery

2. Business Retention & Expansion (BR&E) – focus on existing businesses

3. Business Development & Economic Growth – focus on new businesses

Within the three main categories are sub-categories arranged by subject. They are as follows:

- Business Supports
- Communications
- Economic Diversification
- Funding
- Information Management
- Insurance
- Neighborhood Revitalization
- Process
- Resilience/Preparedness
- Real Estate
- Social
- Workforce

The EOAT has further broken down the recommendations into a timeline which is to serve as a suggested prioritization and are to be adjusted to suit ever-altering requirements. The recommendations follow typical best practices that, generally-speaking, build upon one other.

Going forward, the Region must determine exactly which recommendations will be adopted, as well as the priority and timeline of each. Ultimately the RMWB must make the determination as to whether or not these recommendations will be adopted, how they will be addressed, and exact timing of each. For additional details on timelines and potential resources, refer to Appendix 4.

- Immediate (Blue): Recommendations given to EDB during EOAT assessment site visit on January 27, 2017
- Short-term (Red): from June 2017 through one year
- Medium-term (Yellow): approximately 1 – 2 years from June 2017
- Long-term (Green): approximately 3 – 5 years from June 2017

The following recommendations are for the RMWB and community groups to adopt as they see fit:

	Sub-Category	Recommended Action
A	Insurance	<p>Insurance Advisory Program</p> <ul style="list-style-type: none"> Engage experts to provide additional business insurance claim advisory services. Speak to the Canadian Red Cross about the immediate need to fill this gap, include financial institutions, the Insurance Bureau of Canada (IBC) and legal advice. Implement a program specifically to address and resolve ongoing matters and unnecessary delays
B	Business Supports	<p>EDB Community Outreach</p> <ul style="list-style-type: none"> Hire a qualified Rural Liaison as soon as possible. Follow-up on pressing business and economic recovery issues within the region. Someone with existing relationships would be an asset. Investigate whether the new Technology Development Advisor (TDA) approved by Alberta Innovates can be housed within Keyano College. Build additional science and technology training capacity.
C	Communications	<p>EDB Initial Engagement with Business</p> <ul style="list-style-type: none"> Send a letter to the region's business community: Welcome them back, introduce the EDB team, reference upcoming business outreach program and outline collaboration on relevant studies Commence planning an inaugural State of the Economy event. Bring together community stakeholders for training, networking and information sharing. Ideally it would take place in November 2017 after the Municipal election. Develop new ways to engage the community with a range of communications tools and tactics
1	Governance	<p>Initial Community Vision; Macro Level</p> <ul style="list-style-type: none"> Create an initial short-term community vision now so that there is a foundation to drive the region's multiple strategies and Municipal plans. This vision is to serve as an immediate 'guide post' prior to the development of the 5 – 10 year strategy. Embrace the opportunity to 'hit the reset button.' Focus on the foundation and community ecosystem that will serve the RMWB for the long-term.
2	Governance	<p>Recovery Task Force</p> <ul style="list-style-type: none"> Develop a transition plan and date for transitioning from recovery to regular operations (eg. providing of necessary services to the region). A transition strategy should include steps to integrating the appropriate task force support staff back into existing RMWB departments and mechanisms to integrate programs (e.g. business outreach) or policies developed for recovery that can support business retention, development and economic resiliency.
3	Governance	<p>Strategic Planning; Fiscal Management</p> <ul style="list-style-type: none"> Develop a Fiscal Management Strategy; address the rollout and mitigation of pending changes Create internal culture reflective of positivity and community strengths Research successful P3 models of service delivery that can support a more efficient deployment of Municipal services Continue to monitor and engage in frequent discussion around Bill 21 impacts and zero-based budgeting; provide updates to businesses Economic Development Branch to access funding from the RMWB's \$10 million Economic Recovery fund for immediate and short term economic recovery priorities.

	Sub-Category	Recommended Action
4	Governance	<p>Regional Cooperation</p> <ul style="list-style-type: none"> • Work across jurisdictions in order to avoid jurisdictional issues, promote inclusiveness and collaboration. Commit to 'can do' and eliminate barriers/red tape as quickly and pragmatically as possible. Determine who will champion the individual projects. • Streamline service agreements, joint marketing, shared priorities
5	Governance	<p>Project Prioritization</p> <ul style="list-style-type: none"> • Align priorities with newly-defined community vision • Build strength locally before externally; focus first on rebuilding of local business community and industry: business supports, relationships, collaborations, gap analysis, identifying needs, resources, etc.
6	Workforce	<p>Assessment</p> <ul style="list-style-type: none"> • Conduct workforce skills assessment; business/industry needs assessment
7	Workforce	<p>Training</p> <ul style="list-style-type: none"> • Develop quick response trades training for rebuild; allow local business to participate • Develop workforce training to meet current market demand and prepare workers for new industry entries • Ignite collaboration between Municipality, Fort McMurray Construction Association, trade organizations and Keyano College to increase programming • Include training in supply chain management, marketing, procurement
8	Funding	<p>Financial Aid</p> <ul style="list-style-type: none"> • Create and launch a Wood Buffalo Community Foundation as a legacy for unspent donation dollars; establishing a mechanism that will continue to invest in community priorities in the future
9	Neighbourhood Revitalization	<p>Rural Recovery</p> <ul style="list-style-type: none"> • Liaise with the Government of Alberta to discuss debris removal plans and options to hire rural businesses and employees as part of that process • Clear dangerous forest debris in rural areas, where it is negatively impacting Indigenous residents/businesses • Follow-up on issues surrounding lease restrictions on trap lines
10	Communications	<p>Consistent Updating</p> <ul style="list-style-type: none"> • Define and position community brand for the immediate new normal and develop initial marketing strategy that will address current opportunities • Continually communicate positive recovery advancements; set expectations, inform of activity and results • Address rural constraints in accessing information • Communicate – locally and externally - the positive strides; region's successes
11	Information Management	<p>Align Research</p> <ul style="list-style-type: none"> • Mandate a collaborative approach to the multiple studies in progress; minimize duplication of valuable resources and individualized tactics; track and communicate outcomes

	Sub-Category	Recommended Action
12	Social	<p>Major Stress Factors</p> <ul style="list-style-type: none"> • Continue to acknowledge and address the real social trauma and pressures that the duo crises have had on the region’s residents; PTSD, anxiety, hopelessness, fear • Align and accelerate recovery strategies to minimize these stressors
13	Business Supports	<p>Small Business Assistance</p> <ul style="list-style-type: none"> • Continue to offer existing workshops and develop new workshops/mechanisms to support individual business resiliency (e.g., business continuity planning, procurement training, business succession planning) • Organize quarterly roundtables on specific topics for both business and community stakeholders • Incorporate entrepreneurship training programs/opportunities and possibly an Entrepreneur Centre/Start Up Incubator
14	Business Supports	<p>Industry Assistance</p> <ul style="list-style-type: none"> • Develop efficient, meaningful ways to engage industry including quarterly roundtables; focus on understanding priorities, issues, major plans, mutual benefits, and potential points of collaboration • Define industry innovation and tech advancements; highlight strengths as part of brand rebuild • Begin to prepare industry for future cluster strategy collaboration. E.g., technology and innovation projects.
15	Resiliency and Preparedness	<p>Regional Economic Preparedness Plan</p> <ul style="list-style-type: none"> • Create a practical plan that can serve as a guidebook • Increase the number of businesses with continuity plans and strategies; this is key in building the overall economic resiliency of the region as well as in minimizing future business disruption challenges including: costly downtime, and tax revenue losses • Develop a tiered system of business re-entry with key resources; identify assets, resources etc. that can be accessed immediately (this could easily be pre-populated in the ExecutivePulse database) • Institutionalize response and steady-state initiatives for short-term and long-term economic recovery • Include Flood and Wildfire Mitigation, vulnerability mapping
16	Resiliency and Preparedness	<p>WildfireSmart Program</p> <ul style="list-style-type: none"> • Continue with the expansion of this program in the community e.g. wildfirebreaks, public education
17	Business Supports	<p>Rural Connectivity</p> <ul style="list-style-type: none"> • Develop a strategy to improve rural broadband • Review and improve connectivity processes between the RMWB and region
18	Communications	<p>Information Dissemination – Rural</p> <ul style="list-style-type: none"> • Research additional options for dissemination of information to remote communities

	Sub-Category	Recommended Action
19	Governance	<p>Municipal Leadership</p> <ul style="list-style-type: none"> • Reduce or remove silos between departments and Recovery that create barriers/issues for business • Encourage pro-business corporate culture; more business-friendly Municipality • Consistently demonstrate transparency; commit to practical collaboration and solutions-based planning
20	Governance	<p>First Nations / Métis Relations</p> <ul style="list-style-type: none"> • Bridge gaps through increased engagement and communication • Outreach to regional communities with specialized Indigenous/economic development expertise
21	Governance	<p>Alignment/connection within the Local Business Community</p> <ul style="list-style-type: none"> • Increase opportunities for more Business to Business (B2B), Business to Government (B2G) and Business to Consumer (B2C) networking events for community stakeholders • Showcase regional/urban/rural businesses, (include trappers) • Recognize complete business mix including forestry, mining, agribusiness
22	Governance	<p>Management of Key Issues</p> <ul style="list-style-type: none"> • Continue to meet with industry on Bill 21, zero-based budgeting, transportation infrastructure and the realignment of Municipal priorities/strategies
23	Governance	<p>Internal Development and Education</p> <ul style="list-style-type: none"> • Encourage RMWB economic development staff to attend BR&E International Conference: Edmonton, June 19 – 23, 2017 to learn more about best practices in BR&E • Encourage current and future economic development staff to have specialized economic development training/certification in order to increase their knowledge, experience and ability to implement required economic development strategies and tactics
24	Process	<p>Permitting and Licensing</p> <ul style="list-style-type: none"> • Improve permitting, licensing, re-zoning processes in all departments; reduce lag times; respond to business more seamlessly • Work with rural business to consider revising regulations based on unique circumstances • Update current business licensing process and database: <ul style="list-style-type: none"> • Incorporate NAICS code into all business licenses • Increase content on licenses to include more detail re: primary and secondary products, services, workforce/ NOCS, and supply chain
25	Business Supports	<p>Business Ambassador Program</p> <ul style="list-style-type: none"> • Within the Municipality, coordinate a Business Ambassador Program (BAP) team with a representative from key departments/divisions (eg. Economic Development, Planning, Engineering, Licensing etc.) to improve and streamline policies, programs and processes and relaying concerns, questions and suggestions encountered by business

	Sub-Category	Recommended Action
26	Business Supports	<p>Optimize Business Support Opportunities</p> <ul style="list-style-type: none"> • Coordinate a meeting of RMWB business stakeholders to help develop a Business Supports Plan to address the various needs expressed by local businesses. Identify champions to implement various areas. • Implement a Business Satisfaction Survey for ongoing feedback into programs and services <p><i>Note: Many economic development organizations implement regular Business Satisfaction Surveys in order to collect data on a number of topics related to the economy, business operating environment, and their Municipal business-related services in order to help shape programs and services for the business community.</i></p>
27	Communications/ Business Supports	<p>Promotion of Local Goods and Services</p> <ul style="list-style-type: none"> • Create an online business directory offering an up-to-date listing of all active businesses, their products and services, and contact information • RMWB’s new Social Procurement Policy; test to ensure success; implement marketing campaign to outline benefits and resources • Shop Local Campaign; assist business in increasing revenue, initiate community engagement/pride, foster partnerships, link this to the regional business directory • Promote identified regional business assets to outside markets • Open two-way engagement process for procurement of goods and services between business, government and industry; maximize knowledge and resources already existing in region
28	Communications	<p>Internal and External Communications Strategy and Implementation Plan</p> <ul style="list-style-type: none"> • Develop a communications strategy to inform existing businesses and business prospects on economic development programs and processes; include a mechanism to gather community feedback that informs policy and program development. Ensure the outcomes are reported quarterly and annually. • Specifically: <ul style="list-style-type: none"> • Support and foster community vision, values and brand attributes • Provide ongoing updates on business, issues and general progress to all segments of region; *consider preferred communication methods for each segment • Report on the number of programs and processes that have been enacted and what the results/outcomes are • Acknowledge recovery work that was done, and is being done by Indigenous members in the region
29	Workforce	<p>Attraction and Retention</p> <ul style="list-style-type: none"> • Engage business and industry to determine methods for attracting and meeting the diverse workforce needs • Address the challenges of: accessible and affordable workforce housing; training and retraining; providing essential community services (e.g. suitable medical services) • Increase the awareness of fly-in fly-out as a necessity for meeting industry workforce requirements. The RMWB must work with industry to find progressive solutions for ensuring optimal worker experience and optimizing positive engagement with this population.
30	Real Estate	<p>Landlord/Tenant Issues</p> <ul style="list-style-type: none"> • Conduct an analysis of current lease rates with the expressed purpose of offering realistic solution for displaced businesses. Involve landlords, tenants, Fort McMurray Real Estate Board etc.

	Sub-Category	Recommended Action
31	Funding	<p>Additional Financial Resources</p> <ul style="list-style-type: none"> • Research various funding grants (Government of Canada, Government of Alberta, Canadian Red Cross, CARES, CIR Capacity Building, Alberta Innovates, WD, ICCI etc.) • Create a matrix of available funding/loan programs for entrepreneurs and businesses • Engage grant writer to support grants for RMWB and social, economic, environmental organizations
32	Business Supports	<p>Business Visitation Program (BVP)</p> <ul style="list-style-type: none"> • RMWB Economic Development to develop action plans for ongoing outreach engagement with businesses; regular, consistent face-to-face meetings, surveys etc. • Two-way exchange of information: gather details on needs of business community, report back progress, updates, etc. Utilize ExecutivePulse database to input business engagement data. This amalgamated data will help the RMWB provide important business details, trends and feedback so other RMWB staff and Council can make 'pro-business' changes based on valid, defensible input. <p><i>Note: BVP is a common term used by economic development professionals that refers to an active outreach program with the purpose to Municipalities to develop future policies, programs, internal processes and resources to assist their local business community.</i></p>
33	Business Supports	<p>Visitor Ambassador Program</p> <ul style="list-style-type: none"> • Find a partner to initiate this program (i.e. Tourism, Chamber, Welcome Wagon, Airport etc.). Start with the hospitality and service sectors. • Focus on providing experiences that support the regional brand and encourage positive, repeat visitation and business. Train first points of visitor contact (e.g., taxi drivers, workers at public parks and recreation areas) on how to make a good first impression, and how to better represent the area's attributes. This group is often the first point of contact for many visitors, tourists, investors. Don't underestimate their ability to influence future decisions to live, invest or visit your community.
34	Economic Diversification	<p>Research & Development (R&D)</p> <ul style="list-style-type: none"> • Optimize R&D potential; promote opportunities after business environment has recovered • Focus on existing businesses

	Sub-Category	Recommended Action
35	Communications	<p>Regular Communications Forums; Opportunities for Engagement</p> <ul style="list-style-type: none"> • Develop new ways to engage the community with a range of communications tools and tactics • Annual State of the Economy Summit
36	Real Estate	<p>Commercial and Industrial Space</p> <ul style="list-style-type: none"> • Develop a strategy on how to increase multi-use commercial and industrial space • Research affordable incubator/shared/co-working space needs and opportunities for businesses. Investigate value of in-house specialists to offer expertise, mentorship. Potential partnership with Keyano College
37	Workforce	<p>Healthcare Attraction and Retention Strategy</p> <ul style="list-style-type: none"> • RMWB should liaise with social organizations to identify a champion: <ul style="list-style-type: none"> • For the attraction and retention of medical/healthcare professional services to the region • For innovative training models to provide accessible opportunities for residents to enter the healthcare professions and meet local demand • To identify public and private sector models for creating, recruiting and retaining essential healthcare professionals
38	Governance	<p>Long-term Community Vision and Strategy</p> <ul style="list-style-type: none"> • Update Municipal Development Plan (MDP) to allow for the New Normal; realign for new fiscal, demographic, economic and industrial environments for the entire region
39	Economic Diversification	<p>Regional Asset Mapping</p> <ul style="list-style-type: none"> • Complete a Regional Asset Mapping exercise to: <ul style="list-style-type: none"> • Deepen understanding of unique assets (tangible, intangible) and how they interact to support innovation-based growth; • Create a foundational tool for long-term strategic planning; • Identify detailed map of linkages that exist within the region, cultivating a sense of regionalism and interdependence of assets; • Initiate strong community engagement for future collaboration. • Mapping should incorporate: existing and lacking physical assets and amenities; available/vacant commercial properties; priority infrastructure improvements; placemaking. <p><i>Note: Regional Asset Mapping is a common term used by economic development professionals that refers to a process to reveal a region's unique set of assets, both tangible and intangible, to help leaders leverage assets, and to inform strategic plans to achieve their economic and workforce development goals. This exercise can also be included as part of the overall Business Cluster Development process.</i></p>

	Sub-Category	Recommended Action
40	Economic Diversification	<p>Regional Business Cluster Development Strategy</p> <ul style="list-style-type: none"> • Launch a Regional Business Cluster Development Strategy that will: • Identify business clusters, shared challenges, solutions, leaders and strategies for collaboration • Mobilize the region by providing connection to opportunities for products and services • Analyze the economy (performance outcomes, economic drivers, economic outputs, producers, suppliers) • Support the future growth of clusters <p><i>Note: A Regional Business Cluster Development Strategy is a common term used by economic development professionals, originally coined by Michael Porter in 1990. It enables regions to better understand their companies competitive advantages, connect buyers and suppliers, improve productivity (and often profitability) and guide policymakers and industry leaders on strategies for economic development.</i></p>
41	Social	<p>Child Care Access</p> <ul style="list-style-type: none"> • Work with social organizations to improve availability
42	Real Estate	<p>Land Inventory</p> <ul style="list-style-type: none"> • Identify and inventory available land; brownfield, greenfield and/or potential greyfield development • This information needs to be included in the BI&A strategy
43	Real Estate	<p>Housing</p> <ul style="list-style-type: none"> • Liaise with RMWB and social organizations to improve affordable housing options; for purchase and rent • Identify opportunities for seniors' housing/accommodation
44	Economic Diversification	<p>Regional Economic Development Strategy</p> <ul style="list-style-type: none"> • Create a 10-year Regional Economic Development Strategy that is built on: regional assets, the Business Cluster Development Strategy, qualitative research data, input from business visitation program and industry collaboration. <p><i>Note: This should take place after the MDP update, and regional branding exercise.</i></p> <ul style="list-style-type: none"> • Based on the Strategy, confirm the best economic development delivery model (e.g. in-house, department, P3)

	Sub-Category	Recommended Action
45	Economic Diversification	<p>Business Investment & Attraction Strategy (BI&A)</p> <p>As part of this process:</p> <ul style="list-style-type: none"> • Develop a ‘Community Investment Readiness’ (CIR) capacity; • Incorporate BI&A Tools- updated data, industry trends/priorities, Commercial Industrial Land Use Study, retail market analysis, incentives, branding messages, land inventory, cluster profiles/opportunities, regional assets, demographics, regional attributes etc. • Target and attract new business investment based on cluster priorities • Attract foreign direct investment (FDI) based on cluster priorities <p><i>Note: Business Investment & Attraction is a common term used by economic development professionals which focuses on bringing new business and/or investment to a Municipality. Ideally, a BI&A strategy is created AFTER BR&E and business outreach, as well as a Business Cluster Strategy. A BI&A Strategy should build on priorities and target markets identified through Business Cluster Strategy work, targeting businesses and markets that can competitively and profitably locate in the region, and complement existing businesses in the region.</i></p>
46	Economic Diversification	<p>Research and Development (R&D/tech-based) Opportunities</p> <ul style="list-style-type: none"> • Seek opportunities to partner with those currently involved in R&D activities: OSCA, COSIA (e.g. Wastewater Technology Development Centre), Alberta Innovates, Keyano College, U of A, U of C, NAIT, SAIT etc. • Expand on COSIA research on climate change; industry’s leading-edge research; overall environmental stewardship • Focus is on new businesses <p><i>Note: Ensure that progressive opportunities and successes are reflected in the rebranding and marketing efforts</i></p>
47	Economic Diversification	<p>Fort McMurray International Airport</p> <ul style="list-style-type: none"> • Promote more collaboration between the Fort McMurray Airport Authority, industry and the community • Harness this valuable asset; facilitate growth and development • Work with the Airport to expand market access linking to a BI&A goal
48	Business Support	<p>Identify and Foster Joint Industry Priorities</p> <ul style="list-style-type: none"> • Liaise with COSIA and CAPP about joint priorities. This work should be closely aligned with or within the RMWB. • Include regional opportunities for business and economic development, good neighbor agreements, joint ventures, Indigenous voice within the RMWB

	Sub-Category	Recommended Action
49	Neighborhood Revitalization	<p>Land Use Bylaw (LUB)</p> <ul style="list-style-type: none"> • Encourage Planning & Development department to adjust Land Use Bylaw (LUB) content to include placemaking initiatives. <p><i>Note: Placemaking is a term used by economic development professionals that refers to a multi-faceted approach in the unique design, planning, and management of public spaces to make the 'places' more engaging and meaningful to residents and business.</i></p>
50	Neighborhood Revitalization	<p>Downtown Revitalization Strategy</p> <ul style="list-style-type: none"> • Develop a comprehensive plan for revitalization of the downtown core • Work with the downtown business community as part of this planning • Address beautification, development and placemaking that will aid business recovery
51	Communication	<p>RMWB Re-Brand for Today's RMWB</p> <ul style="list-style-type: none"> • For the purpose of repositioning the RMWB for ultimate economic recovery • Utilize a consultative approach with internal and external stakeholders to attain critical data re: <ul style="list-style-type: none"> • Brand equity; assess and understand perceptions including post-wildfire positivity and recovery, Oil Sands controversies, community desirability, strengths, tech innovation, etc. • Competitive analysis; clearly understand the internal and external competitive landscape • 'Product' definition and positioning – identify differentiators that meet present needs within region; incorporate findings of asset mapping study etc. • Create comprehensive RMWB Brand Strategy and Rollout: <ul style="list-style-type: none"> • Encompass defined business development assets, brand values and attributes • Coordinate multi-tiered implementation to defined target markets (local and external); marketing that promotes brand awareness and adoption, and meets business growth objectives

VIII. THE NEW NORMAL

Success in the New Normal

Rebuilding a sustainable community after not one but two significant incidents is taking enormous heart and determination by everyone in the region. The effort, passion and hopeful attitudes displayed thus far are truly commendable and have laid a positive groundwork that will most certainly drive the new normal forward.

To take this further and create a sustainable and vibrant community for the long-term, the current achievements must now merge with a committed focus on the economic elements that will allow all the wheels to start turning again.

Real economic recovery is about aligning all the core blocks of governance, funding and partnerships with the pragmatic requirements of social, environmental and business recovery. It's about understanding not just the problems but the actual needs; not just the strengths but the feasible opportunities that can help reposition the community as a leader in both human and business vitality.

It is critical that the community takes time to focus on building up the strength of its people, its systems, processes and structural foundations upon which the elements of growth can really thrive.

As with most crisis situations, out of the rubble comes opportunities for renewed growth that can very often take a community beyond where it was before. The RMWB is poised to experience just that. Today's strategic commitment to business revitalization, economic recovery, and regional resilience will positively impact this unique and potential-rich community for a long, healthy future.

"Success is about turning problems into opportunities. The region definitely has what it needs to take this community to new heights: the brain trust, the natural resources, the entrepreneurial attitude, the people. But even on top of all that is a passion for this unique area and a desire to make a better home. That's what will make the region's new normal a great new normal."

Leann Hackman-Carty
CEO, Economic Developers Alberta
www.edaalberta.ca

IX. GLOSSARY

Acronym	Name	Definition	Website
AEMA	Alberta Emergency Management Agency	The Alberta Emergency Management Agency (AEMA) leads the coordination, collaboration and co-operation of all organizations involved in the prevention, preparedness and response to disasters and emergencies.	www.aema.alberta.ca
AHS	Alberta Health Services	Alberta Health Services (AHS) is Canada’s first and largest province wide, fully-integrated health system, responsible for delivering health services to the over four million people living in Alberta, as well as to some residents of Saskatchewan, B.C. and the Northwest Territories.	www.albertahealthservices.ca
AUMA	Alberta Urban Municipalities Association	The Alberta Urban Municipalities Association was founded in 1905 and today represents Alberta’s urban Municipalities. This includes cities, towns, villages, summer villages, and specialized Municipalities, as well as Associate and Affiliate members. It represents and advocates the interests of its members to both the provincial and federal governments. They also work closely with other provincial and federal organizations. They want to create a shared vision of Alberta’s future—one that involves long term planning focused on social and economic growth, a strategic and stable funding matrix for capital projects, vital emergency and social services, and implementation and coordination in the delivery of these services. This partnership will ensure our province’s sustainability and resiliency.	www.auma.ca

Acronym	Name	Definition	Website
BBRC	Back to Business Resource Centre	A one-stop shop for businesses to access government, business planning and office resources to help them return to operations	www.choosewoodbuffalo.com
BDC	Business Development Bank of Canada	Canada's business development bank dedicated exclusively to entrepreneurs. BDC's mission is to help create and develop strong Canadian businesses through financing, advisory services and indirect financing, with a focus on small and medium-sized enterprises.	www.bdc.ca
BI&A	Business and Investment Attraction	<p>Business investment and attraction (BI&A) is an Economic Development strategy centered on bringing new businesses and/or investment to a Municipality. A well thought out and developed BI&A strategy can include the following goals:</p> <ul style="list-style-type: none"> • Encouraging existing businesses to expand through investment; • Developing 'Community Investment Readiness' (CIR) capacity; • Targeting and attracting new business investment to your community or region; and • Attracting foreign direct investment (FDI) to your community or region. 	www.edaalberta.ca

Acronym	Name	Definition	Website
BR	Business Resiliency	<p>Business resiliency refers to the ability of a business to quickly adapt to disruptions and maintaining continuous business operations, while safeguarding people and assets. It goes beyond disaster recovery by offering strategies to help avoid costly downtime, mitigating vulnerabilities and maintaining operations in the face of unexpected challenges. Business resilience planning is sometimes referred to as business continuity planning. Only a handful of the businesses we interviewed had addressed this important task in advance with some sort of business impact analysis to help prioritize their most crucial functions and systems. Gaps were even more evident in the interviews with rural business.</p>	
BR&E	Business Retention and Expansion	<p>Business Retention and Expansion (BR&E) is a strategy that supports goals for Economic Development that in turn, supports the vision and mission of your community. The strategy of BR&E supports and fosters the development and growth of local business. BR&E is a crucial yet rewarding community Economic Development strategy. The key goal is to strategically plan, manage and implement programs that help existing business thrive and grow. The outcome is a sustainable business community which in turn provides a sustainable community foundation.</p>	www.edaalberta.ca
BRL	Brownfield Land	<p>Brownfield land is a term used in urban planning to describe land previously used for industrial or commercial purposes with known or suspected pollution including soil contamination due to hazardous waste. After clean up, such an area can become a community park or business development.</p>	www.wikipedia.org

Acronym	Name	Definition	Website
BSN	Business Support Network Wood Buffalo	A network to increase capacity, social connection and recognition to support the long-term achievements and sustainability of the regions' small business community	www.facebook.com/BSNWB
BVP	Business Visitation Program	BVP is a common term used by economic development professionals that refers to an active outreach program with the purpose to Municipalities to develop future policies, programs, internal processes and resources to assist their local business community.	
CANDO	Council for the Advancement of Native Development Officers	Cando (Council for the Advancement of Native Development Officers) is a federally registered, non-profit society that is Aboriginal controlled, community based, and membership driven. Cando is directed by a national regionally represented volunteer board of elected EDOs representing every region of Canada. Cando has been instrumental in facilitating partnerships with EDOs, academics, Aboriginal leaders and senior corporate and government representatives. Cando is unique because it is the only national organization that focuses on education and professional development for EDOs working in Aboriginal communities or organizations.	www.edo.ca
CAPP	Canadian Association of Petroleum Producers	The Canadian Association of Petroleum Producers (CAPP) is the voice of Canada's upstream oil, Oil Sands and natural gas industry.	www.capp.ca
CMC	Certified Management Consultant	The Certified Management Consultant (CMC) designation is the profession's only international certification mark, recognized in over 40 countries. It represents a commitment to the highest standards of consulting and adherence to the ethical canons of the profession.	www.cmc-canada.ca
COSIA	Canada's Oil Sands Innovation Alliance	Canada's Oil Sands Innovation Alliance (COSIA) is an alliance of Oil Sands producers focused on accelerating the pace of improvement in environmental performance in Canada's Oil Sands through collaborative action and innovation. Through COSIA, participating companies capture, develop and share the most innovative approaches and best thinking to improve environmental performance in the Oil Sands, focusing on four Environmental Priority Areas (EPAs) – greenhouse gases, land, water and tailings.	www.cosia.ca

Acronym	Name	Definition	Website
	Community	The term 'community' within this document refers to the entire jurisdiction of Wood Buffalo which includes both rural and urban boundaries that coexist under a single Municipal government. As an amalgamated Municipality since 1996, its regional communities include: Fort Fitzgerald, Fort Chipewyan, Fort McKay, Fort McMurray, Draper, Sapræ Creek Estates, Gregoire Lake Estates, Anzac, Janvier and Conklin as well as five First Nations and six Métis Locals.	www.facebook.com/BSNWB
EDA	Economic Developers Alberta	Economic Developers Alberta (EDA) is the leading economic development network in Alberta. EDA's broad and varied membership base includes: Municipalities; towns; regions; tourism groups; financial institutions; Crown Corporations; businesses; Regional Economic Development Authorities; Community Futures Development Corporations; federal, provincial, regional and Municipal government agencies; students; NGO's; and other groups and individuals that are either involved or interested in economic development.	www.edaalberta.ca
EDB	RMWB Economic Development Department	Municipal department responsible for economic development.	www.choosewoodbuffalo.com
EDO	Economic Development Officer	As a rule, the EDO is a liaison between the Economic Development committee and community, and supports, encourages, and advises local businesses. Broadly defined, the duties of an EDO can range from Economic Development program coordination and implementation, supervision, to matching business investment opportunities with investors. It is important to note that the job is not about creating business or jobs; rather, it is about facilitating an environment where business and investment can flourish. An EDO is a mentor that facilitates Community Economic Development, and links various government departments (through the Planning Department), business and community groups and potential information or resources for short-term and long-term projects. In some communities the EDO and Planning department work closely together on development of Municipal and regional growth strategies. In other communities, or regions, one EDO administers and facilitates Economic development for a number of communities and Councils. There are many different job descriptions, duties, and responsibilities for Economic Development Officers. Each provincial association of Economic Development has a list of members, code of ethics, and standards of expectation for economic developers.	www.cosia.ca

Acronym	Name	Definition	Website
EOAT	Economic Opportunity Assessment Team	<p>Their basic premise is to take advantage of specific expertise and knowledge that economic development practitioners have gained from recovering their own economies, by volunteering their time and energy to share this experience with others. Most have been in the same shoes as the affected community at some point, and have had to deal with crises, failures and success. They know how overwhelming it can be and want to help. Some have lived through one disaster, while others have lived through 20 or more. These practical, unbiased, third-party advisory teams are extremely helpful for economic developers as they begin to position their community for a “new normal”. EOAT’s visit a community post-disaster to obtain specific information and feedback through various types of stakeholder engagement strategies. This primary research is then supplemented with relevant secondary research the community has completed, and further enhanced with the team’s previous experience and expertise in order to develop recommendations targeted to improve the community’s overall economic recovery.</p>	<p>www.iedconline.org www.resto-reyoureconomy.org</p>
ER	Economic Resiliency	<p>Resilience is the ability to anticipate risk, limit impact, and bounce back rapidly through survival, adaptability, evolution, and growth in the face of turbulent change. Resilient communities minimize any disaster’s disruption to everyday life and their local economies. Resilient communities are not only prepared to help prevent or minimize the loss or damage to life, property, and the environment, but they also have the ability to quickly return citizens to work, reopen businesses, and restore other essential services needed for a full and timely economic recovery.</p>	<p>www.capp.ca</p>
FCM	Federation of Canadian Municipalities	<p>The national voice of Municipal government representing 90% of Canada’s Municipal population. They advocate on behalf of Municipalities.</p>	<p>www.fcm.ca</p>
FDI	Foreign Direct Investment	<p>Foreign direct investment (FDI) is when a company based in one country makes an investment into a company operating or functioning in another country. This foreign direct investment could include investment in land, equipment, technology, and/or acquisition of shares or holdings. FDI can be an entirely new development ‘greenfield’ or through the change of ownership of existing companies referred to as mergers and acquisitions.</p>	

Acronym	Name	Definition
FEMA	Federal Emergency Management Agency	A US government agency. FEMA's mission is to support US citizens and first responders to ensure that the US works together to build, sustain and improve its capability to prepare for, protect against, respond to, recover from and mitigate all hazards.
GRL	Greenfield Land	Greenfield land is undeveloped land in a city or rural area either used for agriculture, landscape design, or left to evolve naturally. These areas of land are usually agricultural or amenity properties being considered for urban development. Greenfield land can be unfenced open fields, urban lots or restricted closed properties, kept off limits to the general public by a private or government entity.
GYL	Greyfield Land	Greyfield land is economically obsolescent, outdated, failing, moribund or underused real estate assets or land. The term was coined in the early 2000s from the 'sea' of empty asphalt that often accompanies these sites.
Industry	Industry	Within this document, Industry (with a capital I) references the oil and gas sector within the RMWB.
IBC	Insurance Bureau of Canada	Established in 1964, Insurance Bureau of Canada (IBC) is the national industry association representing Canada's private home, auto and business insurers. Its member companies represent 90% of the Canadian property and casualty (P&C) insurance market. IBC works on a number of fronts to increase public understanding of home, auto and business insurance. Public understanding is also fostered through IBC's five regional consumer centres, where trained personnel with years of industry and government relations experience answer tens of thousands of consumer inquiries each year.
ICCI	Invest Canada-Community Initiatives	The Invest Canada-Community Initiatives (ICCI) program provides support to Canadian communities seeking to improve their capacity to attract, retain and expand FDI in order to create jobs for Canadians, support innovation and increase exports.
IEDC	International Economic Development Council	The International Economic Development Council (IEDC) is a non-profit, non-partisan membership organization serving economic developers. With more than 5,000 members, IEDC is the largest organization of its kind. Economic developers promote economic well-being and quality of life for their communities, by creating, retaining and expanding jobs that facilitate growth, enhance wealth and provide a stable tax base. From public to private, rural to urban and local to international, IEDC's members are engaged in the full range of economic development experience. Given the breadth of economic development work, our members are employed in a wide variety of settings including local, state, provincial and federal governments, public-private partnerships, chambers of commerce, universities and a variety of other institutions. When we succeed, our members create high-quality jobs, develop vibrant communities, and improve the quality of life in their regions. One of IEDC's initiatives is Restore Your Economy, which is a one-stop shop of disaster preparedness and post-disaster economic recovery resources for economic development organizations, chambers of commerce, local business and trade organizations, and other economic recovery stakeholders.

Acronym	Name	Definition	Website
NAABA	Northeastern Alberta Aboriginal Business Association	The Northeastern Alberta Aboriginal Business Association (NAABA) is a non-profit organization that consists of a growing interest group of Aboriginal Businesses, committed to enhancing and creating an environment, which promotes businesses, jobs, and training for the betterment of all Aboriginal people in the region. Our association certifies that all Full Members are qualified by at least 51% Aboriginal ownership and are local to the Wood Buffalo region.	www.naaba.ca
NADC	Northern Alberta Development Council	The Northern Alberta Development Council advances the promise of Alberta's North. NADC's mandate is to help the region's 150 communities and 350,000 people realize their rich potential and strengthen their diverse economies. The Council is made up of a dedicated group of provincial and local leaders and staff tasked with producing quality regional development information, supporting education and skills enhancement programs and building strategic partnerships.	www.nadc.gov.ab.ca
NAICS	North American Industry Classification System	The North American Industry Classification System (NAICS) is the standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the Canadian business economy	
OSCA	Oil Sands Community Alliance	OSCA was established in 2013 with approximately 25 industry members. It is an industry association that pursues innovative solutions that help to build thriving communities. Together with its neighbours, it is enabling responsible growth of Alberta's Oil Sands.	www.oscaalberta.ca
	Placemaking	Placemaking is a term used by economic development professionals that refers to a multi-faceted approach in the unique design, planning, and management of public spaces to make the 'places' more engaging and meaningful to residents and business.	
RAM	Regional Asset Mapping	Regional Asset Mapping is a common term used by economic development professionals that refers to a process to reveal a region's unique set of assets, both tangible and intangible, to help leaders leverage assets, and to inform strategic plans to achieve their economic and workforce development goals. This exercise can also be included as part of the overall Business Cluster Development process.	
R&D	Research and Development	Refers to the research and development taking place in a community within industry, government and academia.	
	Regional Business Cluster Development Strategy	A Regional Business Cluster Development Strategy is a common term used by economic development professionals originally coined by Michael Porter in 1990. It enables regions to better understand their companies competitive advantages, connect buyers and supplier, improve productivity (and often profitability) and guide policymakers and industry leaders on strategies for economic development.	

Acronym	Name	Definition	Website
RINSA	Regional Innovator Network of Southern Alberta	The Regional Innovation Network of Southern Alberta (RINSA) is a collaborative partnership between, Lethbridge College, Economic Development Lethbridge, and the University of Lethbridge, with support from Community Futures Lethbridge Region, SouthGrow Regional Initiative, Alberta Southwest Regional Alliance and NRC-IRAP. The purpose of RINSA is to offer entrepreneurs and SMEs: Innovation support, technology transfer and commercialization programs; Marketing, business development, training and export development services; Networking and match-making services; Business incubation opportunities; Access to funding at various stages (vouchers, angel investment, venture capital); and access to funding through Community Futures' lending services for start-up and/or expansion.	www.rinsa.ca
RMWB	Regional Municipality of Wood Buffalo	The RMWB is a specialized Municipality located in northeast Alberta. Its regional communities include: Fort Fitzgerald, Fort Chipewyan, Fort McKay, Fort McMurray, Draper, Saprae Creek Estates, Gregoire Lake Estates, Anzac, Janvier and Conklin as well as five First Nation communities and six Métis locals.	www.rmwb.ca
TDA	Technology Development Advisor	A position funded by Alberta Innovates	www.albertainnovates.ca
USA	Urban Service Area	The USA is composed of nine areas including: Abasand Heights, Beacon Hill, Gregoire, the Lower Townsite, Parsons Creek, Thickwood Heights, Timberlea, Waterways and Saline Creek.	www.rmwb.ca
WB	Wood Buffalo	A specific region in Northern Alberta.	www.rmwb.ca

