Building a Future of Prosperity

Newell Region Investment Readiness Study

March 20, 2017

Contents

Executive Summary

The Newell Region is located in southeast Alberta, centred along Highway 1, between Medicine Hat and Calgary. Five municipalities comprise the region, and its community leaders want to be proactive in ensuring that it continues to maintain and attract new investment.

The Investment Attraction Study builds on previous economic development efforts and provides direction into sectors that the Region should continue to target. An economic base analysis for the Newell Region's municipalities was developed to provide insight into the current state of the economy. It shows that, in general terms, the Region's agricultural economy has been successful over the last few years, in comparison with the province. Growth in the oil and gas and manufacturing sectors has slowed down, but both remain strong economic drivers for the Region. One sector that is projected to grow in importance is tourism and hospitality, especially building off the Region's provincial parks and recreational facility assets.

A scorecard analysis was undertaken for the two largest municipalities in the region, the City of Brooks and the County of Newell. These two municipalities were selected as they had more reviewable resources available than the smaller urban municipalities. It is also likely that more inquiries concerning available lands would be received for Brooks and Newell.

The results show both municipalities scoring relatively well for investment readiness, but with areas of improvement possible. Some of the more important areas needed for a higher score include:

- Ensure all agencies involved in economic development services delivery know their responsibilities and obligations by creating and signing a Services Delivery Memorandum of Understanding and Lead Handling Protocol
- Simplifying the existing web presence with the development of an investment portal which showcases the Region and directs investors to the right agencies for inquiries
- Updating Municipal Development Plans, which is underway in Brooks, and should be undertaken for the County (should occur every five years to better understand short- and medium-term employment land needs)
- Show investors a clear path forward by creating a flowchart to demonstrate the development approval process and provide a timeline for typical approval processes including development permit approval and Land Use Bylaw amendments
- Develop an investment aftercare program that includes scheduled follow-up with clients to identify, among other things, means of improving customer and approval process services
- Continue to monitor and improve customer and approval processes through an investment aftercare program that includes scheduled follow-up visits with clients.

Overall, the Newell Region provides several competitive advantages that could be marketed to potential investors looking to develop within southeast Alberta. These competitive advantages would have appeal to both a larger developer looking to establish a larger facility in the vicinity of an urban area, but also for a smaller entrepreneur interested locating to a rural community. Figure 1 lists several competitive advantages, along with disadvantages, that may impact an investor's decision to locate within the Region.

FIGURE 1: NEWELL REGION'S COMPETITIVE ADVANTAGES AND DISADVANTAGES

Competitive Advantages	Competitive Disadvantages
▪ Eastern Irrigation District can provide raw water and Newell Regional Services Corporation can provide potable water to rural development ▪ Lands within and near Brooks/Newell municipal boundary are largely unsubdivided quarter sections ▪ Multiple regional health care facilities ▪ Proactive and supportive municipal leadership ▪ Available supply of serviced land within regional industrial parks ▪ Housing costs lower than competitor municipalities ▪ In-community metal fabricating and construction companies to support regional projects, oil and gas exploration and services, and agriculture/food processing	▪ Lack of public transportation for workers ▪ Lack of business diversity ▪ Commercial sector is less developed than other urban communities ▪ Highway visibility for commercial development (particularly within Brooks) along Highway 1

The Region's overall competitive advantages and disadvantages translate into value propositions for four investment sectors, as proposed by the Consultant Team. Figure 2 on the following page shows each sector and its value proposition which can then be marketed and promoted to the investment community.

FIGURE 2: NEWELL REGION SECTOR VALUE PROPOSITIONS

Oil & Gas

- Oil & gas infrastructure well established and capable of expansion
- Strong skilled labour force
- Strong support industries such as metal fabrication and construction-related industry
- Medicine Hat College campus offers pre-employment welding, carpentry, and electrician training

Agriculture/Food Processing

- Large population of new Canadians working or interested in the sector
- Immigration support resources for labour force development: Language programming at local Medicine Hat College campus for ESL training, Newell Community Action Group, Brooks Community Adult Learning Centre, etc.
- Price-competitive, serviced and available land
- Raw and potable water availability

Manufacturing

- Access to major transportation infrastructure in southern Alberta (e.g. Highways 1 and 36, CP Rail Mainline)
- Price-competitive, serviced and available land suitable for manufacturing
- Mix of available skilled and unskilled labour
- Population base with lower median ages than Strathmore and Medicine Hat

Hospitality & Tourism

- Many natural amenities including Lake Newell Resort and Dinosaur Provincial Park
- Strong entertainment and recreational amenities and opportunities to cluster
- Access to major transportation infrastructure in southern Alberta (Highways 1 and 36)
- Unskilled labour availability and large immigrant population
- Population base with lower median ages than Strathmore and Medicine Hat

Through research, potential gaps in the value chains were identified and warrant closer investigation by the Region's economic development staff as potential businesses to target. They include:

- Agriculture/Agrifood Value Chain: farm product wholesale distributors
- Oil and Gas Value Chain: pipeline transportation businesses

Study Recommendations

The strategy recommends three key strategic directions for the Newell Region to undertake in the next five years. These directions will underpin how the new organization is structured and include different actions that can increase the area's investment readiness, and its ability to support reactive and proactive approaches to investment attraction. The strategic directions, along with recommended initiatives, partners and resources are listed below:

Building on the Economic Development Framework

Recommended Initiative	Partners	Resources
Formalize the City of Brooks as lead economic development agency for the Newell Region ▪ Establish an Economic Development Services Delivery Memorandum of Understanding (MOU) between Newell Region Municipal Partners ▪ Produce a Strategic Economic Development Plan that outlines a vision, mission, goals, directions, and marketing and financial plans ▪ Consult with other community agencies to see how they can contribute to the initiative	▪ Newell Region Municipalities ▪ Brooks and District Chamber of Commerce ▪ Community Futures ▪ Medicine Hat College	▪ In-kind administrative contributions from partner organizations ▪ Budget of approx. $5,000
Establish Single Portal for the Newell Region's Investment Attraction Activities ▪ Investigate the most effective way of developing an alternative to NavigateNewell.com and to better integrate OpportunityNewell.com ▪ Continue to update and build upon marketing materials that have been produced (e.g. update with 2016 census information) ▪ Ensure the new portal complies with IEDC standards for site selector attraction	▪ Newell Region Municipalities ▪ Brooks and District Chamber of Commerce	▪ $10,000 - $25,000 (for graphic design and branding support) ▪ $7,000 - $10,000 (for basic website design, hosting, graphic design etc.) ▪ $5,000 per year for search engine optimization ▪ In-kind contribution of partner resources ▪ Staff time of EDO

Recommended Initiative	Partners	Resources
Create 'One Window' Approach for Planning and Development Inquiries ▪ Provide a flow chart to identify planning and development processes for each of the partner municipalities ▪ Identify point of contact information for external resources (e.g. utility companies, provincial ministries)	▪ Newell Region Municipalities ▪ External agencies that may have an interest in planning and development matters within the region	▪ In-kind administrative contributions from partner organizations

Creating Investment Attraction Programming

Recommended Initiative	Partners	Resources
Develop Lead Generation Network Connections for Newell Region Economic Development ▪ Establish and grow relationships with key contacts in the Alberta Ministry of Economic Development and Trade, with portfolios that reflect Newell Region's target sectors ▪ Develop relationships with key influencers in Commercial Real Estate involved in site selection, particularly in Calgary ▪ Develop relationships with industry association executives in target sectors ▪ Continue to coordinate with Palliser Economic Partnership in their investment attraction activities for southeast Alberta ▪ Establish connections with the investment and business finance community to leverage knowledge and opportunities	▪ Newell Region Municipalities ▪ Alberta Ministries (Economic Development and Trade, Culture and Tourism, Labour) ▪ Palliser Economic Partnership ▪ Local Immigration Partners ▪ Workforce Development and Employment Partners ▪ Community Futures Brooks	▪ Staff time of EDO ▪ Budget of $15,000/ year for travel and networking expenses (this can include minor domestic event registrations)
Coordinate Strategic Familiarization Tours ▪ Coordinate local tours of strategically targeted influencers and decision makers (key actors in the lead generation network, business leaders in target sectors, ICI Realtors and Site Selectors, entrepreneurs and innovators) ▪ Investigate opportunities to leverage provincial tours and participate in similar activities at regional scales	▪ Newell Region Municipalities ▪ Brooks and District Chamber of Commerce ▪ Alberta Ministries (Economic Development and Trade, Culture and Tourism, Labour) ▪ Calgary Commercial Real Estate Community ▪ Real estate representatives for specific companies that the	▪ Budget of $7,000 - $25,000 depending on frequency of tours, level of travel and accommodation covered, and location of target audiences ▪ Staff time of EDO

Recommended Initiative	Partners	Resources
	Region wishes to attract	
Coordinate Trade and Investment Missions with Local Companies ▪ Through establishing relationships with provincial and federal trade representatives, identify opportunities to participate in target sector specific missions ▪ Coordinate a group of local companies that have specific interests in market expansion and international trade opportunities and facilitate participation in mission activities along target sector lines ▪ Investigate programs to offset the cost of business participation in trade activities	▪ Newell Region Municipalities ▪ Alberta Ministries (International Trade and Jobs, Tourism and Skills Training) ▪ Local Industry and Business	▪ Budget can range from $20,000 to $50,000 depending on number of external events targeted and what collaborative funds can be leveraged through joint initiatives

Developing Ongoing After Care Supports

Recommended Initiative	Partners	Resources
Establish a Formal Business Retention and Expansion (BR&E) Program ▪ Investigate the purchase of Client Relationship Management (CRM) software to track inquiries and ongoing issues (consider the availability of Executive Pulse which is found in municipalities across Alberta) ▪ Identify all local businesses that operate within the target sectors and catalogue these through a database ▪ Leverage local knowledge and research to identify growth companies and important contacts ▪ Establish an annual corporate calling initiative that gathers intelligence and identifies company needs and challenges, which could be done through a survey. To focus time and money most effectively, consider a 'triage' approach that pinpoints businesses that are in most need of support ▪ Coordinate local regulators to be prepared to respond proactively to expansion and location requirements	▪ Newell Region Municipalities ▪ Brooks and District Chamber of Commerce ▪ Community Futures	▪ Budget of $10,000 which can include CRM licencing for one user and local travel and networking expenses ▪ Budget of $15,000 for Triage BR&E survey ▪ One time fees may be associated with buying in to CRM systems or purchasing new licencing

Recommended Initiative	Partners	Resources
Develop After Care Programming ▪ Coordinate local business, immigration and workforce development services to provide timely integration and a soft landing platform ▪ Create a local welcoming program that includes local politicians and dignitaries ▪ Assemble a group of various business services including accounting, taxation, finance and legal professionals that can support business establishment in Canada ▪ Streamline new companies into the B&E program for ongoing support and plan opening celebrations if desired (including local media exposure)	▪ Newell Region municipalities ▪ Brooks and District Chamber of Commerce ▪ Local Immigration Partners ▪ Workforce Development and Employment Partners ▪ Community Futures	▪ Staff time of EDO ▪ In-kind contribution of partner resources ▪ Minor local travel expenses ▪ Potential minor marketing and promotional costs

1 Introduction

The purpose of this project was to provide the Newell Region's Joint Services Committee with an investment attraction strategy that achieves two main objectives:

- Providing a focused, strategic approach to marketing the region's attracting investment based on local strengths and advantages
- Providing a basic framework for marketing the region's strengths to the greater investment community within the province and the country

The project was undertaken through the review of planning and strategic documentation from the region's municipal partners. The project team also examined the contents and strengths/weaknesses of the existing internal and external websites that assist residents and the development community.

Stakeholder consultation was conducted with community, developers and business leaders. The project team completed several interviews and site visits in the area. The findings from the engagement process helped to validate the data analysis. This provided the means to connect the local strengths and assets to the opportunities identified.

Strategic directions to support the pursuit of these opportunities and assist in creating the organizational framework needed were developed. Action plans with partners, priority levels and resources were developed to assist Newell Region's economic development leads with implementation.

2 Our Basis for Growth

In order to formulate a clear path for advancing our priorities and activities for investment attraction and economic wealth generation more broadly, it is necessary to assess where we are now and where we have been as a collective of communities. This section functions as an overview of several key assessments that were conducted so as to serve as a basis for informed decision making and confident planning. More detailed analyses of all the components summarized below are available in the Appendix section of this document.

2.1 Situational Analysis

2.1.1 Document review – Common Threads

A variety of background documents were consulted in the process of developing this project. To the greatest extent possible, legislation and policy documents were gathered from across the region. These include:

- City of Brooks and County of Newell Economic Profile (2016)
- City of Brooks and County of Newell Regional Profile (2016)
- Business Survey and Action Plan (2016)
- City of Brooks Municipal Census (2015)
- City of Brooks Municipal Development Plan (2001)
- Brooks-Newell Intermunicipal Development Plan (2009)
- City of Brooks Land Use Bylaw 14/12 (2012)
- Bassano Land Use Bylaw 865/16 (2016)
- Duchess Land Use Bylaw (2013)
- Rosemary Land Use Bylaw 404/08 (2008)
- City of Brooks Area Structure Plans (n/d)
- Quality of Life Survey, City of Brooks (2014)
- Quality of Life Survey, Hamlet of Tilley (2014)
- Newell Region Youth Community Action Plan (2016)

The documents and policies identified above have been analyzed comparatively to uncover areas of thematic overlap. The policies are catalogued in correlation with the common themes in order to observe patterns – in essence, to find the 'common threads' among them.

The following discussion highlights the themes that are strongly represented in the current policy framework in the region. Additionally, this type of review also allows for the identification of gaps that exist where key themes and areas of importance are not prominent in the regional policy framework. By understanding where gaps exist, Brooks and Newell will be in a better position to develop a more robust policy framework which could be used to attract new businesses and investment and retain existing assets.

The common threads identified among policies and documents examined include:

- Enhanced social infrastructure capacity (including public and shared space, age-friendly planning and youth retention)
- Quality of life enhancements, recreation services, and community safety
- Economic development and tourism
- Transportation, physical infrastructure capacity, facilities and asset management
- Community branding, marketing, and communications
- Agricultural strength and resilience
- Intergovernmental communications, coordination, and collaboration
- Zoning and bylaw enforcement

These themes are shown in Figure 1, where they are compared to all policy documents respectively.

It is important to note that almost every document reviewed is connected to *Quality of Life Enhancements, Recreation Services, and Community Safety* as well as *Economic Development and Tourism* opportunities in some way. Some of the documents outline where certain economic or recreational activities can take place (e.g. Land Use Bylaws and Area Structure Plans), others outline the specific opportunities which exist within the region (e.g. the Economic and Regional Profiles). Despite many documents having content that relates to economic development, there is no overarching economic development strategy at this time. Regardless, a workplan has been prepared by Brooks administration so economic development initiatives will continue to be advanced.

FIGURE 3: COMMON THREADS ANALYSIS FOR NEWELL REGION DOCUMENT REVIEW

Themes	Total Threads	City of Brooks and County of Newell Economic Profile	City of Brooks and County of Newell Regional Profile	2016 Business Survey	2016 Business Survey Action Plan	2016 City of Brooks Municipal Census	Brooks Municipal Development Plan	County of Newell and City of Brooks Intermunicipal Development Plan	City of Brooks Land Use Bylaw	Bassano Land Use Bylaw	Duchess Land Use Bylaw	Rorsemary Land Use Bylaw	City of Brooks Area Structure Plans (Northeast Sector, Northwest Sector, South Industrial, Southeast Sector)	Quality of Life Survey, City of Brooks	Quality of Life Survey, Hamlet of Tilley	Newell Region Youth Community Action Plan
Enhanced social infrastructure capacity (including public and shared space, age-friendly planning and youth retention)	4		✓											✓	✓	✓
Quality of life enhancements, recreation services and community safety	13	✓	✓		✓		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Economic development and tourism	12	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓			
Transportation, physical infrastructure capacity, facilities and asset management	4	✓		✓			✓	✓								
Community branding, marketing and communications	2				✓		✓									
Agricultural strength and resilience	3	✓		✓				✓								
Intergovernmental communications, coordination and collaboration	3	✓						✓								✓
Zoning and bylaw enforcement	8				✓		✓	✓	✓	✓	✓	✓	✓			

Source: MDB Insight, 2017

2.1.2 Economic Profile

The Economic Profile provides an overview of economic footprint of the five municipalities within the region, with comparators where necessary. It examines the demographic, workforce, and business related data for Brooks and County of Newell and compares them to regional neighbours to highlight areas of strengths and weaknesses for the region. This type of information helps to build a better understanding of the current socio-economic situation in both Brooks and the County as a whole. The data was collected from Statistics Canada Canadian Census, the 2011 National Household Survey (NHS), and from Canadian Business Patterns (CBP) data.

Where possible, a complete range of data for all communities was used, however, not all communities had sufficient or comparable data. Data for Brooks was the most reliable and consistent as it is the largest community in the region. Data pertaining to Rosemary and Duchess were available only through the 2006 and 2011 Canadian Census, not in the NHS. The data gathered for County of Newell includes a number of small hamlets, such as Bow City, Cassils, Gem, Lake Newell Resort, Patricia, Rainer, Rolling Hills, Scandia, and Tilley.

A complete Economic Profile can be found in Appendix B. Key findings from the include:

- The City of Brooks continues to experience population growth, growing by 11% between 2011 and 2015
- The City of Brooks has a relatively young population, with the majority of residents between the age of 25 to 44 years old
    - This indicates that the City is supported by a young and active workforce (something not necessarily the same in other rural areas of Alberta more generally)
- The City of Brooks had a higher proportion of immigrants (21.11%) and non-permanent residents (3.79%), leading to increased diversity, compared to Strathmore or Medicine Hat
    - This diversity is something that should not only be celebrated within the City but also shared as a success story to the province as a whole
- The City of Brooks had the lowest average value of a dwelling ($243,559) compared to County of Newell, Strathmore, or Medicine Hat as well as the highest median income ($38,214) in 2011
    - This suggests that residents have additional, disposal income to spend at local restaurants, shops, and events and festivals

- The County of Newell has the largest proportion of its residents educated in fields related to agriculture, natural resources, and conservation
    - These workers support both the agricultural and oil and gas industry, which is in high concentration in the County.
- The City of Brooks has the highest proportion of residents employed in the construction (19%) and the mining, quarrying, and oil and gas extraction (17%) industries compared to Strathmore, Medicine Hat or the province as a whole
- The City of Brooks had high Location Quotient[1] concentrations in the manufacturing sector (3.26) and mining, quarrying, and oil and gas extraction (2.54) sectors in 2011, indicating that they play a critical role in the local economy. At the same time, Brooks has strong retail and food service establishments for a community of its size, indicating it is a regional hub
- City of Brooks residents predominantly live and work inside of the City, indicating that Brooks has been able to retain its residents to support local jobs and businesses
- The City of Brooks had a total of 2,022 businesses in 2015, with 248 businesses related to agriculture, forestry, fishing and hunting, 178 businesses related to mining and oil and gas extraction and another 175 construction related businesses
- The County of Newell's business community is largely small businesses with less than 5 employees, where self-employed individuals and businesses with one to four employees make up 96% of all businesses.
    - A similar finding is true for Brooks, where 81% of businesses are either self-employed individuals or operate with less than five employees

2.2 Consultation Summary

This section provides insight into the combined consultation processes undertaken in the development of this report and strategy. Two separate methods of outreach were employed. First, a list of ten local and external business leaders that are familiar with the Newell Region's economy was interviewed for their insights on the business climate, barriers to growth, opportunities for enhancement, and areas of priority. Second, two focus group discussions were conducted in Brooks with a variety of regional stakeholders taking part.

While the detailed results of each individual engagement method are provided in the Appendix, key emergent themes from the consultations are summarized below:

[1] Location Quotient (LQ) is a method of measuring the concentration of business activity in a local area relative to larger area, usually the province that a municipality is located within. An LQ of over 1.20 suggests a local relative concentration of activity. In theory, this suggests the local sector is exceeding local demand, and could be exporting products/services to areas outside of the local community. A sector LQ of less than 0.75 suggests a gap area.

- Stakeholders recognized that agri-food, oil and gas, tourism and manufacturing sectors are critical to the economy
- The tourism sector was seen as an opportunity to be further leveraged, building on the natural heritage of the region as well as using existing outdoor spaces for new festivals and events for residents and visitors alike
- Quality of life assets are seen as key strengths of the region as a whole, including recent investments in recreational facilities
- Other significant assets include two college campuses in Brooks, the Crop Diversification Centre, and the proximity to major highway infrastructure (Highways 1 and 36)
    - Participants suggested that these assets can be further leveraged and marketed to attract investment and to further benefit the economy
- The diversity of cultures was seen as a strength to be further celebrated
    - Stakeholders saw an opportunity for immigrant-related education and social services which could further boost the economy
    - Social capital in encouraging immigrant entrepreneurship is also something with local cultivation (i.e. a desire to grow entrepreneurial spirit among immigrants)
- Stakeholders believe that there is a strong entrepreneurial spirit in the region which could be further supported at the municipal level, through mentorships and 'boot camps'.
- Concerns were raised about the cumbersome start-up process for businesses and general frustration with municipal policies, specifically about the lack of a one-stop-shop for business-related approvals or stronger guidance or information about approvals processes
    - Other issues discussed included issues around communicating and disseminating program information throughout the region as well as the perception of a Brooks-centric Chamber of Commerce
- Stakeholders discussed the desire for a long-term, innovative vision for Brooks which not only supports existing businesses but also creates an 'open for business environment'

2.3 Asset Inventory

An asset inventory allows for a footprint of the components of a community that bring it value, as well as serves to identify areas where opportunities may exist to enhance or build new assets. In some cases, it can serve as an opportunity to benchmark against other communities. In the context of a local economy, such as the Newell Region and the municipalities within it, assets fall into the following kinds of categories:

- Industry Value Chains and Clusters
- Quality of Place Assets

- Demographics
- Cost of Living
- Cost of Business
- Commercial and Industrial Land and Sites
- Workforce Considerations

An additional benefit of the raw data that comprise the asset inventory is that they can serve as a repository for any kind of specific information that can quickly be located and converted into custom information a site selector or potential investor specifically asks for.

2.3.1 Industry Value Chains and Clusters

The agri-food, tourism, manufacturing, and oil and gas sectors are strong in the Newell Region. Newell's proximity to Calgary plays a critical role in supporting these industries. Brooks, the smaller urban municipalities, and the County of Newell are strategically located near Highway 1 and/or Highway 36. The Canadian Pacific Rail mainline connects the region to the rest of Canada helping businesses connect with suppliers and clients. The region is also served by two municipal airports, the Brooks Airport and the Bassano Airport.

Data for the value chain assessment was captured from InfoCanada and the Opportunity Newell Business Directory. There is some discrepancy between the data gathered to the Canadian Business Patterns data available. This may be because some businesses may not have registered with the Chamber of Commerce.

The data suggests the largest employers in County of Newell are:

- Spraggs Meats
- Alberta Prairie Meats
- Scandia Honey
- JBS Canada

The largest employers in the City of Brooks are:

- City of Brooks
- Grasslands School Division
- Alberta Health Services

2.3.1.1 Agri-food Value Chain

According to the City of Brooks and County of Newell Regional Profile, 1,025 people were employed in the agricultural sector in 2011.[2] Figure 2 illustrates that there are 52 agri-food businesses within the region. The region is home to JBS Canada, one of the

[2] City of Brooks and County of Newell, Regional Profile. Retrieved from: http://www.brooks.ca/DocumentCenter/View/935

largest employers in southern Alberta as well as Scandia Honey Corporation, the largest honey producer in the Newell Region.[3]

The Government of Canada's Crop Diversification Centre South is also located in Brooks, a 10,550 sq. ft. horticultural research centre which includes a Production Greenhouse, a Research Greenhouse, and a Header House. Brooks is also home to the Canadian Cocoon Testing Centre, which monitors pollination bees for pollination quality control. Both of these research centres help to support the broader agricultural sector and help to attract talent to the area.

Strengths in this sector are the high number of farms throughout the region, over 700 according to Canadian Business Patterns data as well as support activities for farms. A possible gap in the chain would be wholesale distributors for farm products.

2.3.1.2 Tourism Value Chain

The National Household Survey shows that there were 860 residents of the region employed in tourism related sectors in 2011. This includes both the accommodation and food services as well as the arts, entertainment, and recreation industries. Lake Newell, one of Canada's largest man-made lakes, Dinosaur Provincial Park, Maximum Adventure Park, and a number of local festivals and events bring tourists into the region and helps to encourage residents to participate in local activities. There are 40 accommodation opportunities in the region, including a number of hotels, inns, and campsites. This indicates that the region is well suited to supporting the existing tourism market.

2.3.1.3 Manufacturing Value Chain

Figure 4 shows that there are 67 businesses related to the manufacturing value chain operating in the Newell Region. This includes 14 food manufacturers, which also support the agri-food value chain. Figure 4 highlights a possible gap in the value chain, with only one business in plastics manufacturing and only two businesses in the transportation equipment manufacturing industry. These sub-industries are relatively connected to the oil and gas extraction industry, which plays a dominant role in the regional economy. Accordingly to the City of Brooks and County of Newell Regional Profile, 3,380 people were employed in the manufacturing sector.[4]

2.3.1.4 Oil and Gas Value Chain

Newell Region is home to one of Alberta's most active natural gas field, with over 30,000 wells in the region, accounting form half of all wells in Alberta.[5] According to the City of Brooks and County of Newell Regional Profile, there were 3,095 people employed in the mining, oil and gas extraction sector within the region as a whole.[6] Many of these businesses (e.g. residential building construction, specialty trade

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[3] Opportunity Newell, Agriculture. Retrieved from: http://opportunitynewell.com/subcontent-detail.asp?ID=354&SubID=87

[4] City of Brooks and County of Newell, Regional Profile.

[5] Opportunity Newell, Oil and Gas. Retrieved from: http://opportunitynewell.com/subcontent-detail.asp?ID=354&SubID=89

[6] City of Brooks and County of Newell, Regional Profile.

contractors) also support the growth in residential and commercial development in the region as well as the oil and gas industry. Additionally, it is common within the region for farm operations to also have an oil field service business.[7] This shows how interconnected the different industries are within the Newell Region.

2.3.1.5 Presences of Supplier and Support Businesses

The availability of suppliers and support businesses is critical for any industry to survive, and the enrichment of any economy can always be improved by seeking stronger synergies between leading businesses and their suppliers or support services. This is particularly true for businesses which rely on transportation of goods, like the agri-food, manufacturing, and oil and gas related activities.

Canadian Business Patterns data reveals that there are 226 businesses in the construction industry, 206 businesses in the Professional, Scientific, and Technical Services (PST) industry, and 85 wholesale trade businesses in County of Newell as well as the City of Brooks. The Opportunity Newell business directory and InfoCanada[8] revealed the following information pertinent to support industries:

- 96 construction business ranging from residential and non-residential construction to highway and bridge construction, as well as foundation and structure contractors
- 58 PST businesses ranging from accounting/ bookkeeping to research and design/ specialised design services

2.3.2 Quality of Place Assets

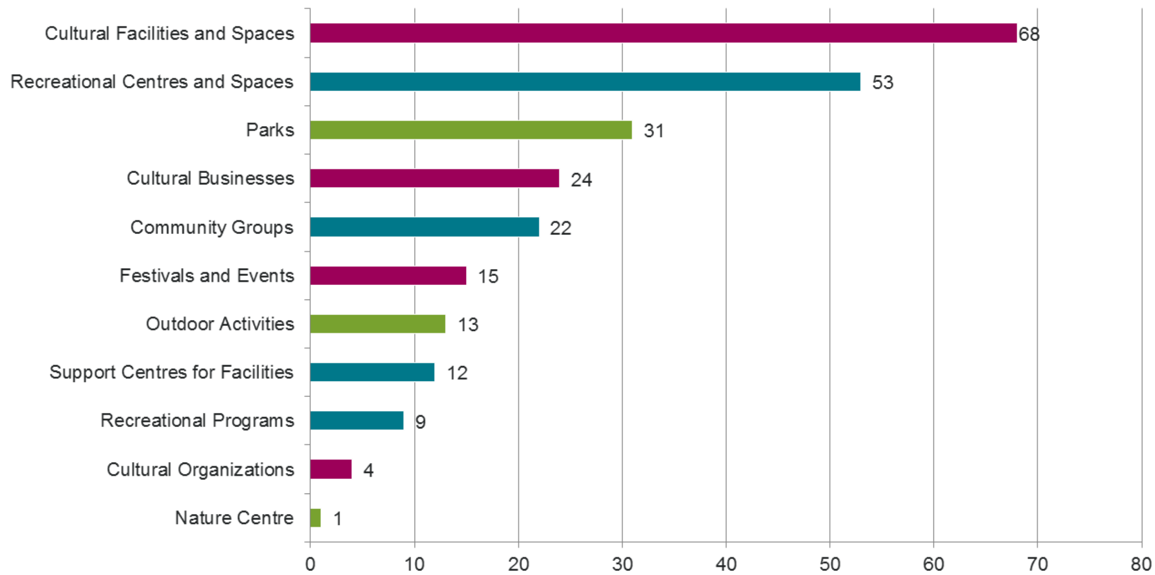
Strong quality of life assets help to support the tourism sector in the region as well as the attraction and retention of businesses and residents.

Overall 262 quality of life assets were identified. This includes cultural amenities, recreational amenities, and environmental assets. Some of the assets in the inventory overlap into multiple categories based on their nature. For example, dance studios fall under both cultural businesses as well as recreational programming.

The City of Brooks and County of Newell are home to 67 cultural facilities and spaces, which include churches, libraries and performing arts venues. Of the 98 recreational amenities, recreational facilities and spaces made of the majority of assets, 53 in total, including parks, arenas, curling rinks, baseball diamonds, and golf courses. Area residents also have access to three provincial parks (Tillebrook, Kinbrook Island, and Dinosaur).

[7] Opportunity Newell, Oil and Gas
[8] InfoCanada provides a list of businesses within a given region.

FIGURE 4: QUALITY OF LIFE ASSETS



Residents of the region have access to a number of health and emergency services. There are two main health centres, the Bassano Health Centre and the Brooks Health Centre, both offering 24-hour emergency services. The Brooks Alberta Health Services EMS station serves the City as well as the surrounding region. The region also participates in the Rural Physician Action Plan, which provides resources for rural communities to recruit physicians to rural communities. 86% of residents in both County of Newell and Brooks have a family doctor.[9] Other medical health services available to regional residents include medical clinics, massage therapists, dental clinics, chiropractors, and eye and vision clinics.

2.3.3 Demographics

Though the community profile also addresses demographics, in terms of assets, the local population in the Newell Region is important because it identifies what the current population looks like, from which inferences can be made about labour force availability. While new demographic data will be available later in 2017, 2011 Census data remains the most accurate representation of the region and its comparator communities.

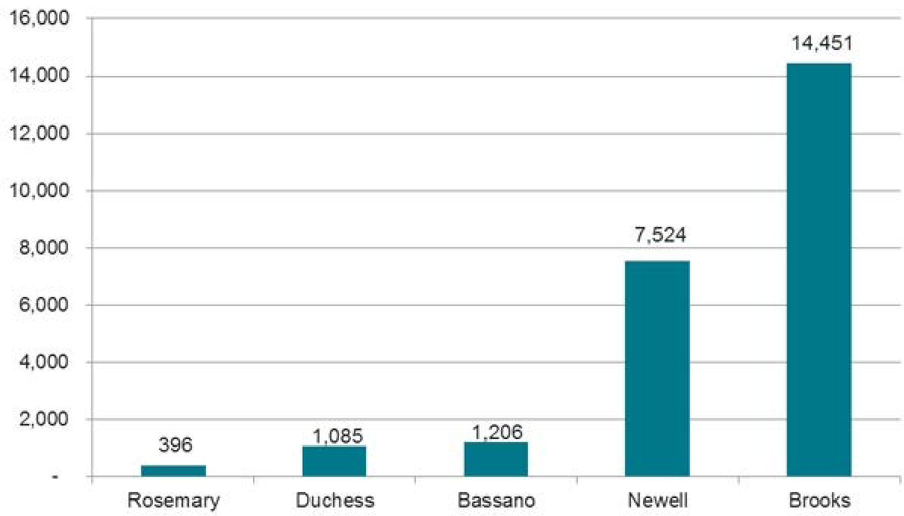
Brooks is one of the fasted growing communities in Alberta. With the release of the 2016 overall population statistics, Brooks remains the largest community in the region with just under 14,500 residents.[10] All municipalities with the exception of Bassano grew in population between 2011 and 2016. The County of Newell is the second

[9] Alberta Economic Dashboard, Newell County. Retrieved from: http://regionaldashboard.alberta.ca/region/newell-county/#/

[10] The 2015 Municipal Census conducted by Brooks set the population at 14,185.

largest community with a population of 7,524. The largest urban community outside of Brooks remains Bassano, with a population of 1,206.

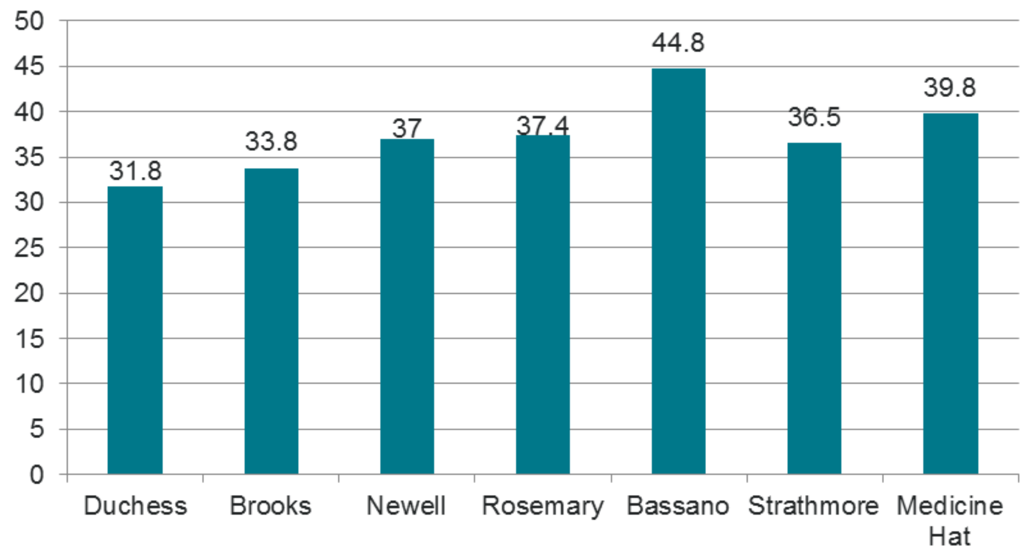
FIGURE 5: POPULATION STATISTICS, 2016 CENSUS



Source: Statistics Canada 2016 Census.

The median age of Newell residents was 37, while residents of Brooks had a median age of 33.8. Within County of Newell, the community of Duchess had the lowest median age (31.8) while Bassano had the highest (44.8). In particular, Duchess and Brooks are more competitive than Strathmore and Medicine Hat, but the rural area of County of Newell is notably oldest among all comparators. This means the younger workforce components are concentrated in the urban municipalities, where they are raising families.

FIGURE 6: MEDIAN AGE OF RESIDENTS

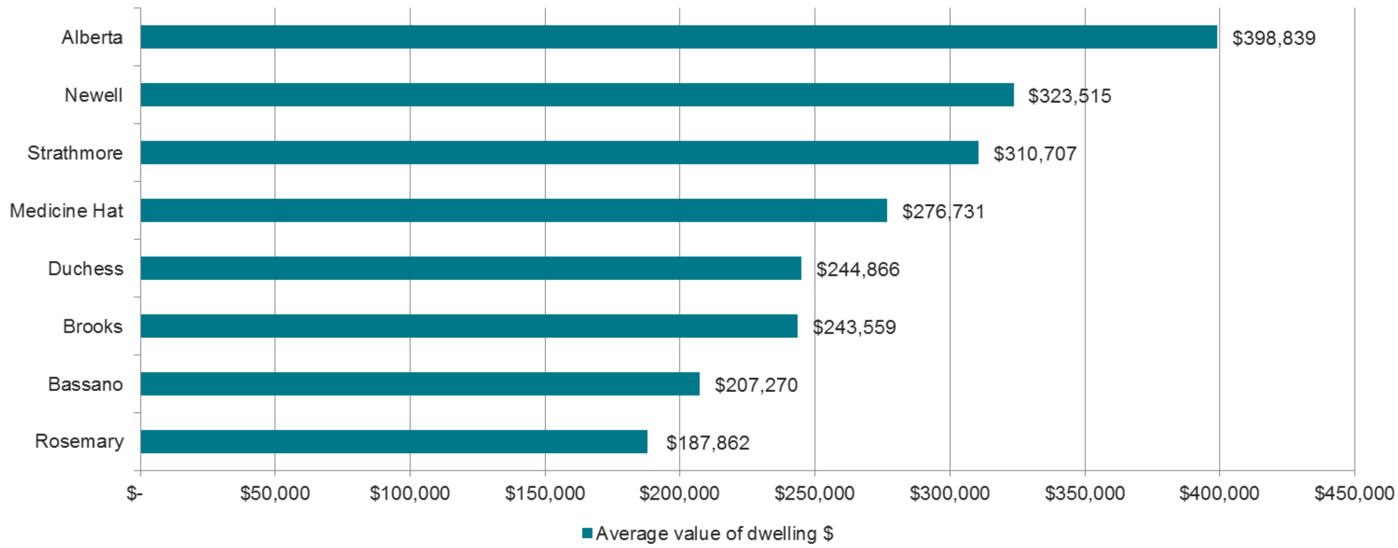


Source: Statistics Canada 2011 Community Profiles.

2.3.4 Cost of Living

The Consultant Team has reviewed available data concerning cost of living for the five within the region. Housing within the County of Newell is (on average) more expensive than the comparator urban municipalities due to a larger presence of estate residential housing within the County. Nevertheless, the average value, as shown in Figure 9 is still under the provincial average of $398,839. Within the urban municipalities, the average cost of a dwelling becomes even lower. Brooks' average dwelling value compares favourably to Medicine Hat and Strathmore, and the average dwelling values for the smaller urban municipalities are less than Brooks (with the exception of Duchess). Overall, the Newell Region's housing affordability is favourable to competing jurisdictions along Highway 1.

FIGURE 7: AVERAGE VALUE OF DWELLING, 2011



Source: National Household Study, 2011.

The data summarized above represent the clearest comparison across the various communities, though somewhat dated. Census data scheduled for release later in 2017 will allow for a more current overview. In the meantime, a 2016 study conducted by City of Brooks provides some housing value comparisons, but only two of the initial comparators are shown:

- Brooks $236,650.00
- Medicine Hat $252,460.00
- Strathmore $301,935.00

The findings indicate that Brooks continues to remain regionally competitive in comparison to external communities such as Medicine Hat and Strathmore.

In addition, Alberta's Regional Economic Dashboard tracks data for *average residential rent.* In Brooks and Bassano in 2015, a two bedroom unit cost on average $880 and $677 respectively, while for Strathmore and Medicine Hat, the monthly averages were $965 and $828.[11] Data was not available for the other municipalities in the region.

Figure 10 highlights the property tax rates for Brooks and the County of Newell communities compared to Strathmore, Medicine Hat and Lethbridge. The figure shows that Brooks has a low residential property tax rate compared to its neighbours in County of Newell and a relatively low non-residential tax rate. Brooks has a lower residential and non-residential tax rate compared to the other comparator communities outside of the region. Medicine Hat has the highest non-residential rate.

[11] Government of Alberta, Alberta Regional Dashboard,

This indicates that both Brooks and the County of Newell are well-positioned to attract commercial and industrial development compared to Medicine Hat.

FIGURE 8: PROPERTY TAX RATES, 2016[12]

	Residential	Non-residential	Non-residential, unserviced
Brooks	6.9149	11.3264	-
Bassano	9.1259	15.9885	-
Rosemary	10.4454	14.0912	-
Duchess	8.04511	9.85279	4.36424
Strathmore	3.864 - 5.476	18.2537	-
Medicine Hat	8.6468 - 9.9669	22.588	-
Lethbridge	10.37-13.822	-	-

[12] City of Brooks and County of Newell, Regional Profile; City of Lethbridge, Current Tax Rate. Retrieved from: http://www.lethbridge.ca/living-here/My-Taxes/Pages/Tax-Rates.aspx.; City of Medicine Hat, 2016 total Tax Rate. Retrieved from: http://www.city.medicine-hat.ab.ca/modules/showdocument.aspx?documentid=11188; Town of Strathmore, Bylaw No. 16-04. Retrieved from: http://www.strathmore.ca/include/get.php?nodeid=1641; Village of Duchess, Bylaw 457/14. Retrieved from: http://www.villageofduchess.com/wp-content/uploads/2013/10/Tax-Rate-Bylaw-457-2014.pdf; Village of Rosemary, Bylaw No. 445/15. Retrieved from: http://www.rosemary.ca/wp-content/uploads/2015/06/Bylaw-445-15-Tax-Rate.pdf; Town of Bassano, Bylaw 862/16. Retrieved from: http://www.bassano.ca/Documents/Bylaw%20862_16.pdf

2.3.5 Commercial and Industrial Land and Sites

Commercial and industrial assets are important to the marketability of the Newell Region to investors and site selectors.

Figure 11 provides an overview of developed commercial and industrial land obtained from the Navigate Newell online site selection tool. As the table shows, Brooks being the largest urban centre holds the majority of existing buildings for lease or sale in the region, with properties also available in Duchess and Tilley.

FIGURE 9: AVAILABLE COMMERCIAL AND INDUSTRIAL BUILDINGS IN NEWELL REGION, 2017

Site Name	Location	Sq.Ft	Price	Description
775 Sutherland Drive	Brooks	1750 each (5 separate bays) sf	$700.00/sf (lease)	Commercial/Industrial
Martin Subdivison- 35 Martin Way	Brooks	28,000 sf	$2,490,000 (Sale)	Industrial
823 3 Ave E	Brooks	Unknown	$372,000 (sale)	Commercial Retial
707 2 Avenue East - Brooks	Brooks	Unknown	$872,000 (Sale)	Commercial/Office
Blue sign 15 145051	Brooks	3200 sq ft	$999,000.00 (Sale)	Commercial/Industrial
118 2 Street West	Brooks	5,000 sf	$350,000.00 (Sale), lease also available	Commercial/Industrial
100 Railway Ave E	Duchess	Unknown	$775,000.00 (Sale)	Commercial (accommodation)
144 Centre St	Tilley	50.9x130 feet	$138,150.00 (Sale)	Commercial
153 Cenre St	Tilley	50.9x130 feet	$45,000.00 (Sale)	Commercial
103 & 107 Center Street	Duchess	Unknown	$1,230,000.00 (Sale)	Commercial (accommodation)
49 VEINER Road	Brooks	9.57 ac	$5.75/square feet	Industrial
1 307 6 Street	Brooks	2800sq	$6.86/square feet	Industrial
745 1 Avenue E	Brooks	0.02 ac	Lease rate $600 per month plus GST.	Industrial
329 9 Street E	Brooks	0.18 ac	$350,000 $6/square feet	Industrial
239 Aquaduct Drive	Brooks	1.22 ac	$599,000 $6/square feet	Industrial
5 311 9 Street E	Brooks	0.04 ac	$120,000	Commercial/Office
745 1 Avenue	Brooks	0.02 ac	$600 $8/square feet	Industrial

Source: www.navigatenewell.com, February 2017

In considering undeveloped greenfield land, Figure 12 shows Brooks having the majority of land holdings. Within Brooks, most are located in the Brooks Industrial Park Phase 3, with some also in the EID Industrial Park.

The average sale price per acre has been listed so that it can be used as a benchmark in future comparators and marketing. On average, Brooks sells undeveloped land for $148,000 per acre.

FIGURE 10: AVAILABLE GREEN-FIELD INDUSTRIAL LAND IN NEWELL REGION, 2017

Site Name	Location	Acres	Price	Cost per Acre	Industrial Park
119 Railway Avenue	Rosemary	0.14	$ 10,000	Unknown	Unknown
285 Veiner Road S	Brooks	Unknown	$ 295,000	Unknown	Unknown
161 Irrigation Avenue	Brooks	2.29	$ 338,920	$ 148,000.00	City of Brooks Industrial Park Phase 3
131 Irrigation Street	Brooks	2.4	$ 355,200	$ 148,000.00	City of Brooks Industrial Park Phase 3
100 Irrigation Street	Brooks	5.67	$ 839,160	$ 148,000.00	City of Brooks Industrial Park Phase 3
151 Irrigation Avenue	Brooks	3.14	$ 464,720	$ 148,000.00	City of Brooks Industrial Park Phase 3
160 Irrigation Street	Brooks	5.67	$ 839,160	$ 148,000.00	City of Brooks Industrial Park Phase 3
140 Irrigation Street	Brooks	5.01	$ 741,480	$ 148,000.00	City of Brooks Industrial Park Phase 3
201 Irrigation Avenue	Brooks	3.47	$ 513,160	$ 147,884.73	City of Brooks Industrial Park Phase 3
Plan 0812216, Block 1, Lot 1	Brooks	Unknown	$ 300,000	Unknown	EID Industrial Park
150 Irrigation Avenue	Brooks	2.07	$ 306,360	$ 148,000.00	City of Brooks Industrial Park Phase 3
200 Irrigation Street	Brooks	5.68	$ 840,640	$ 148,000.00	City of Brooks Industrial Park Phase 3
141 Irrigation Street	Brooks	2.87	$ 424,760	$ 148,000.00	City of Brooks Industrial Park Phase 3
120 Irrigation Street	Brooks	6.06	$ 896,880	$ 148,000.00	City of Brooks Industrial Park Phase 3
140 Irrigation Street	Brooks	5.01	$ 741,480	$ 148,000.00	City of Brooks Industrial Park Phase 3
201 Irrigation Avenue	Brooks	3.47	$ 513,160	$ 147,884.73	City of Brooks Industrial Park Phase 3
Plan 0812216, Block 1, Lot 1	Brooks	Unknown	$ 300,000	Unknown	EID Industrial Park
150 Irrigation Avenue	Brooks	2.07	$ 306,360	$ 148,000.00	City of Brooks Industrial Park Phase 3
200 Irrigation Street	Brooks	5.68	$ 840,640	$ 148,000.00	City of Brooks Industrial Park Phase 3
141 Irrigation Street	Brooks	2.87	$ 424,760	$ 148,000.00	City of Brooks Industrial Park Phase 3
120 Irrigation Street	Brooks	6.06	$ 896,880	$ 148,000.00	City of Brooks Industrial Park Phase 3

Source: www.navigatenewell.com, 2017

2.3.6 Cost of Doing Business

In addition to questions of affordability and cost competitiveness for residents, commercial operations have water and sewage costs and as well as other utilities. A key challenge associated with such costs is there is no standardized method for tracking and presenting data. Consequently, the amounts and values can vary significantly.

For water and wastewater, data were obtained from Brooks, County of Newell, Bassano, Strathmore and Medicine Hat, as Figure 13 below demonstrates. Yet, it becomes difficult to account for cost competitiveness without some framework for standardization, which will allow for a more detailed comparison. This is addressed below:

FIGURE 11: WATER AND SEWAGE UTILITY RATES FOR NON-RESIDENTIAL COMPARATORS.

Utility	Brooks	Newell	Bassano	Strathmore	Medicine Hat
Water	$ 40.95	$ 56.50	$ 98.00	$ 50.08	$ 43.58
Bulk Water Rate (beyond 13.65/m3)*	$ 0.9168	$ 1.88	$ 1.45	$ 2.10	$ 0.8841
Sewer rates**	$ 35.36	$ 23.00	20% of water consumption	$ 24.47	N/A
Bulk Sewer Rate per 4.55 m3	$ 3.69	$ 3.64	$3.64	$ 9.56	$ 5.10

*Note 1: For Bassano the rate change occurs after 600 m^3, while for Strathmore it changes beyond 30 m3

**Note 2: For sewer rates, Brooks and County of Newell's hamlets have fixed monthly amounts, while Bassano's depend on the water consumption and Medicine had does not charge a base rate for sewage.

Figure 14 addresses the shortcomings identified above by applying a standardized amount of water used (i.e. input) by a business and sewage sent out (i.e. output). From this, any cost-related multipliers from the table can be applied to the same uniform amount, which was 1,000 cubic meters.

FIGURE 12: WATER AND WASTEWATER UTILITY RATES FOR NON-RESIDENTIAL COMPARATORS BASED ON 1,000 CUBIC METER INPUT AND OUTPUT, 2016.

	Brooks	Newell	Bassano	Strathmore	Medicine Hat
Water	$ 40.95	$ 56.50	$ 98.00	$ 50.08	$ 43.58
Bulk Water Rate (beyond 13.65/m3)*	$ 916.80	$ 1,880.00	$ 1,450.00	$ 2,100.00	$ 884.10
Sewer rates**	$ 35.36	$ 23.00	$ 290.00	$ 24.46	N/A
Bulk Sewer Rate per 4.55 m3	$ 3,690.00	$ 3,640.00	$ 3,640.00	$ 9,555.00	$ 5,104.65
Total	**$ 4,683.11**	**$ 5,599.50**	**$ 5,478.00**	**$ 11,729.54**	**$ 6,032.33**

*Note 1: For Bassano the rate change occurs after 600 m3, while for Strathmore it changes beyond 30 m3
**Note 2: For sewer rates, Brooks and County of Newell's hamlets have fixed monthly amounts, while Bassano's depend on the water consumption and Medicine had does not charge a base rate for sewage.

The figure above demonstrates Brooks, County of Newell and Bassano are cost competitive relative to Strathmore and Medicine Hat. Strathmore is constrained in its water supply because it is provided by the City of Calgary. In particular, this serves to drive up the cost of high-volume sewage output; explaining why Strathmore's rate is nearly three times that of Brooks.

More significantly, the cost competitiveness of the region is further leveraged given that the region is located between Calgary and Medicine Hat.

Telecommunications

Internet and cellular telecommunications providers in the Newell Region are summarized in Figure 13. All the providers listed serve residential and commercial bases. Assuming that internet costs are likely to lean more toward the higher end of the price spectrum for a given provider, these range from $80 to $175 per month.

All cellular providers except Rogers have similar upper-limit amounts, ranging between $120 and $130, with Rogers topping out at $385, for its high-end business functions which include additional features.

FIGURE 13: INTERNET AND CELLULAR PROVIDERS IN NEWELL REGION

Type	Carrier	Coverage Notes	Speed	Rates
Internet	Telus	Avalible	25 Mbps downloa/ 1 mbps upload - 150 Mbps down and upload	$25.00 - $80.00
Internet	Bell	LTE Advanced, LTE	LTE Advanced: 12 - 100 Mbps; 4G LTE: 12-40 Mbps	$10.00 - $105.00
Internet	EIDNET	Unknown for region	3 Mbps / 1 Mbps - 9 Mbps/ 5 Mbps	$50.00 - $175.00
Internet	Rogers	5 mbps/ 1 mbps - 1 Gbps/ 50 Mbps	5 Mbps/ 1 Mbps - 1 Gbps/ 50 Mbps	$24.99 - $149.99
Internet	Xplornet	4G and LTE	1.5 - 5 Mbps 3 - 5 Mbps	$56.00 - $96/99 (residential) $109.99 - $154.99 (business)
Mobile Carrier	Telus	LTE Advanced and Super fast LTE Advanced	Unknown for region	$10.00 - $130.00
Mobile Carrier	Bell	LTE Advanced, LTE	Unknown for region	$15.75 - $120.00
Mobile Carrier	Virgin Mobile	LTE Advanced (LTE-A), LTE and HSPA+.	LTE advanced upto 335 mbps; LTE upto 150 mbps	$30.00 - $129.00
Mobile Carrier	Rogers	LTE, Minimal Extended	Unknown for region	$5.00 - $385.00

Sources: various websites for the internet and cellular providers.

2.3.7 Workforce Considerations

The City of Brooks and County of Newell are home to a young, active workforce. In 2011, 8,120 residents in Brooks were employed and 3,635 residents of County of Newell were employed. Brooks' unemployment rate is 1% higher than the County of Newell's rate. Bassano and Duchess have the lowest unemployment rates, with 4.7%. As new Census data become available in 2017, employment rate data will need to be addressed. Also, it is worthwhile considering that from an investment attraction perspective, a higher unemployment rate can be a signal that there is an available labour force. Therefore, even though intuitively people seek a low unemployment rate for their community, from an investment perspective, this may actually be counter-productive because site selectors are in search of young labour force assets.

FIGURE 14: WORKFORCE PARTICIPATION

	Brooks	Newell	Rosemary	Bassano	Duchess
Employment	8,120	3,635	25	685	490
Participation Rate	78.30%	80.00%	70.50%	68.50%	69.90%
Unemployment Rate	5.90%	4.90%	0.00%	4.70%	4.70%
Employment Rate	73.70%	78.20%	63.60%	65.70%	66.70%

Source: Government of Alberta, Alberta Regional Dashboard

In examining labour force characteristics by industry, Brooks has the highest number of residents employed in the manufacturing (1,520) and mining, quarrying, and oil and gas (1,210) industries in 2011. The agriculture, forestry, fishing and hunting (870) and mining, quarrying and oil and gas (480) industries had the largest labour force participation in the County of Newell. According to the City of Brooks and the County of Newell Regional Profile, the County employed the largest number of people in the mining, oil and gas extraction, followed by manufacturing and educational services, Brooks also employed a significant number of people in the mining, oil and gas extraction and manufacturing industries.

FIGURE 15 TOP INDUSTRIES IN COUNTY OF NEWELL AND THE CITY OF BROOKS[13]

	Newell	Brooks
Mining and oil and gas extration	1,985	1,210
Manufacturing	1,860	1,520
Educational services	1,075	-
Agriculture	1,025	-
Retail trade	995	-
Accommodation/food services	-	700

Source: City of Brooks and County of Newell Regional Profile

2.4 Investment Readiness Tools

New investment and development within a community are essential to securing sustainable and future growth. This highlights the importance of communities becoming "investment ready" and having the right personnel, processes and tools in place to facilitate the needs of potential investors[14]. There are many ways in which a community can increase its investment readiness, but what is important is that communities move towards becoming proactive on investment attraction rather than reactive.

[13] City of Brooks and County of Newell, Regional Profile
[14] Alberta Investment Readiness Toolkit, 2012

Toolkits exist to help communities assess and improve their investment readiness in this regard. A detailed appraisal of two dominant investment readiness toolkits is provided in the Appendix; however, what is most salient from that discussion is that investment readiness toolkits begin with a critical assessment of the current state of investment readiness in the form of a test or checklist, upon which specific suggestions can be made about where improvements can be made going forward.

The checklist used for this assessment is based on an amalgam of one developed in the Alberta Investment Readiness Toolkit and one from Ontario called the Investment Readiness Test.[15]

Figure 18 below presents final scorecard results of the checklist, which was applied to Brooks and the County of Newell respectively. These two municipalities were selected as they had more reviewable resources available than the smaller urban municipalities. It is also likely that more inquiries concerning available lands would be received for Brooks and Newell.

The scorecard functions on a points system. Every section has a given number of evaluation questions. Each question can be scored as a "Yes" (2 points), "Needs Improvement" (1 point) or "No" (0 points). Each section is added to identify the total Yes, Needs Improvement (NI), or No.

The highest possible score is 192, if "yes" is marked for all questions. Otherwise, the score breakdown is as follows:

- Greater than 163 = the municipality is very investment ready and well positioned (85% or greater)
- Between 96 and 162 = the municipality is investment ready but there is room for improvement (between 50% and 84%)
- Between 67 and 95 = the municipality is close to being investment ready but requires some additional work and changes to be made (35% to 49%)
- Below 66 = There are many opportunities for the municipality to ensure its investment readiness (below 35%)

As Figure 18 demonstrates, Brooks and the County of Newell scored about 60% and 59% respectively, indicating they both fall within the second level (investment ready, but room for improvement). A critical reason why Brooks and the County had similar scorings is because they share the same Economic Development Officer and other services (such as the site selection website, Navigate Newell).

[15] Alberta Investment Readiness Toolkit, 2012; Ontario Investment Readiness Test, n/d.

FIGURE 16: INVESTMENT READINESS CHECKLIST SCORECARD FOR CITY OF BROOKS AND COUNTY OF NEWELL

Investment Readiness Scorecard	Brooks			County of Newell		
	Yes	Needs Improvement (NI)	No	Yes	Needs Improvement (NI)	No
Part I: Expertise						
▪ Contacts	6	2	0	2	4	0
▪ Land Use Planning	18	6	3	20	5	3
▪ Liaising with Existing Business in your Community	4	1	1	4	1	1
▪ Information Services	2	0	1	2	0	1
Part II: Resources						
▪ Industrial Land Inventory	22	2	5	22	2	5
▪ Joint Ventures	4	0	0	4	0	0
▪ Economic Development Capacity	8	1	3	8	1	3
Part III: Communications						
▪ Community and Site Selection Profile	26	5	13	26	5	13
▪ Website	2	2	2	2	2	2
▪ Other Communication Considerations	4	0	0	4	0	0
Investment Readiness Sub-Totals	96	19	28	94	20	28
Investment Readiness Total (“yes” + “NI”)	115		28	114		28

Source: MDB Insight, 2017.

2.4.1 Key Findings and Opportunities of Investment Readiness

This section provides an overview of the key findings from the assessment summarized above. For a detailed breakdown of the evaluation itself and the analysis of results, refer to the Appendix component of the report.

The assessment resulted in the following key findings and opportunities for improvement:

- Continue to ensure local Economic Development Officer grows in knowledge of land use planning documents and policies. Initiate a formal protocol for site selection responses (i.e., how to document and track site selection opportunities)
- Updating the Municipal Development Plan, which is underway in Brooks, and should be undertaken for the County (should occur every five years)
- Develop a flowchart to demonstrate the development approval process and provide a timeline for typical approval processes included for development permit approval and Land Use Bylaw amendments

- Develop an investment aftercare program that includes scheduled follow-up with clients to identify, among other things, means of improving customer and approval process services
- There is currently no regularly scheduled business retention and expansion (BR+E) survey (though one was performed in 2016). This must continue to be a regular occurrence, designed to understand business needs and continue to cultivate strong ties to the existing business community
- Identify a key contact at each major utility and telecommunications company or department so that technical questions from either a potential investor can be answered with a single, direct phone call
- The site selection tool is advanced and provides information that is valued by site selectors. Despite that there are some opportunities to enhance the tool by including additional data fields that speak to taxes, utility providers and capacity (easily imported from Economic Profile), information on site contamination, telecommunications providers and related information (download/upload, bandwidth, “bars” etc.), and transportation access (i.e. proximity to major transport routes/infrastructure). The use of North American Site Selection Data Standards, as developed by the International Economic Development Council will help to ensure that a website that would replace Navigate Newell is leveraged for maximum adherence to the Standards
- The variety of economic-related websites represents a broad-reaching ecosystem that is at once impressive and confusing to outsiders. Efforts need to be made to steer users of all these pages to a common focal point for information. As things stand currently, it is unclear where to go for different information. At present, it is unclear who the local “leader” is for economic development and who is the ‘supporter’
- There is currently no economic development strategy in place for the region as a whole, although the workplan prepared by the City of Brooks will advance economic development initiatives within the short and medium term
- A list of key contacts in private and public sectors that can provide advisory and technical assistance, and a ‘one-window’ development process specifically for investment attraction
- The Community/Economic Profile for Brooks and County of Newell is a useful set of resources. Some areas suggested for inclusion in a future supplemental document or if the current Profiles are expanded include: labour force profile (including average wages for different National Occupation Levels levels), education attainment levels, list of top public and private sector employers (with names and employee estimates), list of financial institutions, overview of telecommunication services and infrastructure, and testimonials from local businesses
- Information concerning investment inquiries should be shared and compiled between the five municipalities. This means that the municipality best suited to the development proposal should field the enquiry and then report it to the other municipalities as part of inter-municipal meetings.

3 Aligning Our Competitiveness

3.1 SWOT Analysis

Strategic planning is often informed by Strengths, Weaknesses, Opportunities, and Threats (SWOT) assessments or variations thereto. The SWOT is an opportunity to summarize research undertaken on a subject, organize it and then identify strategic directions to maximize opportunities and overcome challenges. Items listed as part of the SWOT have been derived from the Consultant Team's background research and engagement.

A thorough SWOT Analysis will provide a strong foundation in assessing the priority issues and opportunities for the Investment and Marketing Strategy. Building on the SWOT Analysis, the consulting team will identify competitive advantages and disadvantages.

While a SWOT Analysis identifies the traits that might be shared across a larger area (i.e., southern Alberta), competitive advantages and disadvantages help identify what makes the Newell Region the unique place that it is.

A detailed SWOT that focusses collectively on the region, but also where appropriate addresses individual communities.

- Strengths that can provide a competitive advantage
- Weaknesses that must be improved in order to be investment ready – alternatively they can be ignored if not important to the target market
- Opportunities are situations that should be capitalized upon to create economic growth
- Threats are situations that can result in lost investment and decline in community strength

The SWOT analysis follows as Figure 17.

FIGURE 17: SWOT ANALYSIS FOR THE NEWELL REGION

Strengths	Opportunities
▪ Highway and transportation infrastructure ▪ Diverse community with resources for immigrants ▪ Large number of entrepreneurs and small enterprises ▪ Lower cost of housing compared to larger regional communities ▪ Strong oil and gas sector ▪ Strong agriculture sector, both in primary agricultural production and agri-food processing ▪ Metal fabrication businesses provide support to oil and gas exploration	▪ Access to High Load Corridor (Highway 36) ▪ Medicine Hat College program offering in Brooks ▪ Community Futures can provide ongoing training and support to entrepreneurs ▪ Alternative energy (solar) potential ▪ Potential for more small-scale agri-food processors/ start-up companies ▪ City's economic development department can become a 'one-window' for investors
Weaknesses	**Threats**
▪ Economy is primary resource based (oil and gas, agriculture) ▪ Lack of transit options for non-drivers trying to get to place of employment ▪ Lack of commercial or industrial designated land along Highway 1, particularly within Brooks ▪ Opportunity Newell needs a refresh for City economic development staff as primary contacts (currently the County is listed) ▪ Navigate Newell is cumbersome and dated ▪ No overarching Economic Development Strategy for the region	▪ Larger population centres have more diverse retail offerings ▪ Larger municipalities can offer better transportation options ▪ Larger municipalities have more diverse grant programs for investment attraction ▪ Economy is still subject to global commodity prices

3.2 Competitiveness Overview

The results of the SWOT analysis provide a list of Brooks' and Newell's strengths, weaknesses, opportunities, and threats. Looking at competitive advantages and disadvantages is helpful in differentiating the Newell Region from its regional competitors and counterparts. The region's competitive advantages form the basis of the unique value proposition the community offers to new businesses and potential investors, while competitive disadvantages are the factors that need to be addressed to minimize the effects of barriers, particularly when attracting specific types of investment.

Figure 18 highlights the region's competitive advantages and disadvantages:

- Competitive advantages will form the nucleus of the Newell Region's unique value proposition – the 'wow' factor that will motivate potential investors to take a closer look.
- Competitive disadvantages are those elements that the Newell Region needs to fix (or become less of an obstacle) if it is critical to investment attraction and retention efforts.

FIGURE 18: NEWELL REGION'S COMPETITIVE ADVANTAGES AND DISADVANTAGES

Competitive Advantages	Competitive Disadvantages
▪ Eastern Irrigation District can provide raw water and Newell Regional Services Corporation can provide potable water to rural development ▪ Lands within and near Brooks/Newell municipal boundary are largely unsubdivided quarter sections ▪ Multiple regional health care facilities ▪ Participation in the Rural Physician Action Plan ▪ Proactive and supportive municipal leadership ▪ Available supply of serviced land within regional industrial parks ▪ Housing costs lower than competitor municipalities ▪ In-community metal fabricating and construction companies to support regional projects, oil and gas exploration and services, and agriculture/food processing	▪ Lack of public transportation for workers ▪ Lack of business diversity ▪ Commercial sector is less developed than other urban communities ▪ Highway visibility for commercial development (particularly within Brooks) along Highway 1

3.3 Sector Value Propositions

The Region's overall competitive advantages and disadvantages also translate into value propositions for four investment sectors, as proposed by the Consultant Team. Figure 19 on the following page shows each sector and it's value proposition which can then be marketed and promoted to the investment community.

FIGURE 19: NEWELL REGION VALUE PROPOSITIONS

Oil & Gas

- Oil & gas infrastructure well established and capable of expansion
- Strong skilled labour force
- Strong support industries such as metal fabrication and construction-related industry
- Medicine Hat College campus offers pre-employment welding, carpentry, and electrician training

Agriculture/Food Processing

- Large population of new Canadians working or interested in the sector
- Immigration support resources for labour force development: Language programming at local Medicine Hat College campus for ESL training, Newell Community Action Group, Brooks Community Adult Learning Centre, etc.
- Price-competitive, serviced and available land
- Raw and potable water availability

Manufacturing

- Access to major transportation infrastructure in southern Alberta (e.g. Highways 1 and 36, CP Rail Mainline)
- Price-competitive, serviced and available land suitable for manufacturing
- Mix of available skilled and unskilled labour
- Population base with lower median ages than Strathmore and Medicine Hat

Hospitality & Tourism

- Many natural amenities including Lake Newell Resort and Dinosaur Provincial Park
- Strong entertainment and recreational amenities and opportunities to cluster
- Access to major transportation infrastructure in southern Alberta (Highways 1 and 36)
- Unskilled labour availability and large immigrant population
- Population base with lower median ages than Strathmore and Medicine Hat

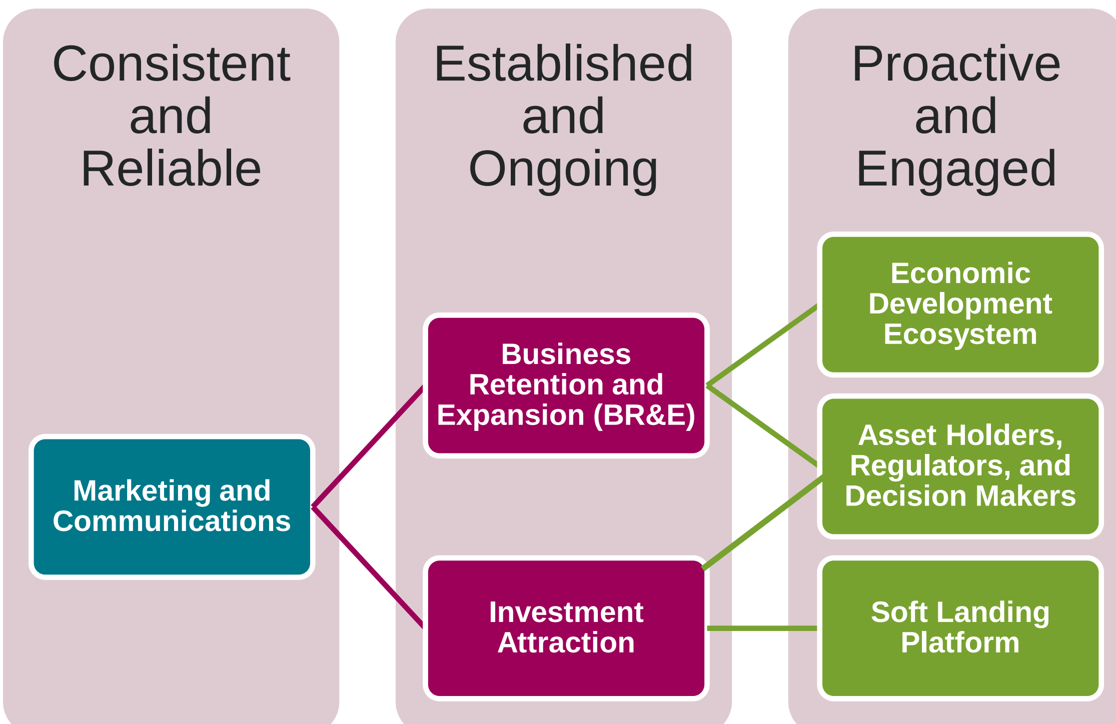
4 Investment Attraction and the Newell Region

4.1 Setting the Stage

In its most basic form, economic development is about how communities (and their representatives) can take specific, sustainable actions over a period of time to improve their economic wellbeing and standard of living. Three types of economic development generally underpin these activities and have developed over time: investment attraction, business retention and expansion, and entrepreneurship.

In order for the region's municipalities to achieve its goal, it must ensure that all of its regional partners are coordinated effectively. This means that some foundational aspects need to be formalized, as the City of Brooks has been designated as the lead agency for Economic Development within the region. The diagram in Figure 20 highlights how the different components of economic development feed into each other. In order to promote the Newell Region as a unified group, marketing and communications must be consistent and reliable across all partners – everyone must be using the same messaging and driving contacts back to the same source.

FIGURE 20: ECONOMIC DEVELOPMENT FOUNDATIONS DIAGRAM



Investment attraction and business retention and expansion programming need to be formally established in the various communities being served. This can be accomplished by one organization or by multiple organizations working in a seamless and coordinated manner. Finally, it is important all of the stakeholders in the broader network of economic development service delivery are operating proactively and are actively engaged with each other. This includes municipal and regional regulators and decision makers (including senior levels of government). Ensuring that local industries, property owners, realtors, development community, and service organizations are actively supporting the community's economic development goals is also a critical component to successful investment attraction, as it projects an image of collaboration and unity under common goals to the prospective investor.

4.2 The Lead Generation Network

Nearly every area has an economic development ecosystem that is comprised of various people and organizations that support industry, business expansion or attraction, entrepreneurship, and workforce development. A key consideration for establishing a centralized investment attraction initiative or program is determining where it can bring value, how it can avoid duplication, and what role it will play in the broader service delivery network.

A lead generation network exists in Canada, although it would not formally describe itself as such. It includes various economic development and industry-specific agencies from federal and provincial governments, regional groups, municipalities and regions, consultants, commercial and industrial realtors, and site selectors.

This network also includes local industries that also have various connections with the different actors in the network. Adopting a proactive, as well as a reactive approach to investment attraction is important. In order for the region to take an active role, it will require a strong understanding of what each sector and industry's competitive strengths are.

Through marketing activities identified within the following subsections, strong relationships are developed and maintained between the region's representatives and the larger provincial and national network. This approach will also allow the region's representatives to drive initiatives from the centre out, by leveraging the resources the network provides. It means proactively seeking touch points with potential investors that are active in the target industries identified in this report. Connecting this back to local opportunities and benefits to a prospective investor is critical to successful investment attraction.

4.3 Investment Attraction Strategy

Based on the evidence presented above, this strategy recommends three key strategic directions for the Region to undertake in the next five years. These directions will underpin how the organization is structured and include different actions that can increase the area's investment readiness, and its ability to support reactive and proactive approaches to investment attraction.

Three Strategic Directions		
Build on the established Economic Development Framework	**Create Formal Investment Attraction Programming and Marketing**	**Develop Ongoing After Care Supports**

Each strategic direction has an action plan with recommended initiatives and activities. The priority, partners, and resources for each recommended initiative are identified. In all cases, the City of Brooks would be the lead or coordinating agency that would then work with the region's municipal partners and external agencies that would have an interest in the item's outcome.

The level of priority is based upon:

- Sense of urgency and level of immediacy indicated by the consultations and research
- Level of economic development potential and gain for the Region
- Feasibility and suitability based on local assets and SWOT analyses
- Resources required and value for output
- Logical sequence of actions

Priority levels are as follows:

- Ongoing = Current Action or Once Established
- Highest = Immediate
- High = Within One Year
- Moderate = Within 3 Years
- Low = Between 3-5 Years

Given fiscal restraint, limited funding resources, and competing priorities for core service delivery, these priority levels recommend a starting point, and may not indicate completion. It is recognized that some of the recommended initiatives may take 1-3 years to complete or may even span the life of the current strategy and be carried over into the next planning period.

4.4 Building on the Economic Development Framework

Recommended Initiative	Priority	Partners	Resources
Formalize the City of Brooks as lead economic development agency for the region ▪ Establish a formal Memorandum of Understanding (MOU) between regional Municipal Partners ▪ Produce a Business Plan that outlines a vision, mission, goals, directions, marketing, financial plans ▪ Consult with other community agencies to see how they can contribute to the initiative	Highest	▪ Newell Region Municipalities ▪ Brooks and District Chamber of Commerce ▪ Community Futures Brooks Office ▪ Medicine Hat College	▪ In-kind administrative contributions from partner organizations ▪ Budget of approx. $5,000
Establish Single Portal for Newell Region's Investment Attraction Activities ▪ Investigate the most effective way of developing an alternative to NavigateNewell.com and to better integrate OpportunityNewell.com ▪ Coordinate the development of marketing material for the region ▪ Ensure the new portal complies with IEDC standards for site selector attraction	High	▪ Newell Region Municipalities ▪ Brooks and District Chamber of Commerce	▪ $10,000 - $25,000 (for graphic design and branding support) ▪ $7,000 - $10,000 (for basic website design, hosting, graphic design etc.) ▪ $5,000 per year for search engine optimization ▪ In-kind contribution of partner resources ▪ Staff time of Economic Development Officer
Create 'One Window' Approach for Planning and Development Inquiries ▪ Provide a flow chart to identify planning and	High	▪ Newell Region Municipalities ▪ External agencies that may have an interest in planning and development	▪ In-kind administrative contributions from partner organizations

Recommended Initiative	Priority	Partners	Resources
development processes for each of the partner municipalities ▪ Identify points of contact information for external resources (e.g. utility companies, provincial ministries) ▪ Coordinate pre-application development review meetings for the City of Brooks. Ensure that City department representatives and relevant outside (e.g. utility companies) are providing timely information/feedback to potential developer/investors		matters within the region	

4.5 Creating Investment Attraction Programming

Recommended Initiative	Priority	Partners	Resources
Develop Lead Generation Network Connections for Newell Region Economic Development ▪ Establish and grow relationships with key contacts in the Alberta Ministry of Economic Development and Trade with portfolios that reflect the region's target sectors ▪ Develop relationships with key influencers in Commercial Real Estate involved in site selection, particularly in Calgary ▪ Develop relationships with industry association executives in target sectors ▪ Continue to coordinate with Palliser Economic Partnership in their investment attraction activities for southeast Alberta	Ongoing - High	▪ Newell Region Municipalities ▪ Alberta Ministries (International Trade and/or Jobs, Tourism and Skills Training) ▪ Palliser Economic Partnership ▪ Local Immigration Partners ▪ Workforce Development and Employment Partners ▪ Community Futures Brooks	▪ Staff time of Economic Development Officer ▪ Budget of $15,000/ year for travel and networking expenses (this can include minor domestic event registrations)

Recommended Initiative	Priority	Partners	Resources
▪ Establish connections with the investment and business finance community to leverage knowledge and opportunities			
Coordinate Strategic Familiarization Tours ▪ Coordinate local tours of strategically targeted influencers and decision makers • This includes key actors in the lead generation network, business leaders in target sectors, ICI Realtors and Site Selectors, entrepreneurs and innovators ▪ Investigate opportunities to leverage provincial tours and participate in similar activities at regional scales	Ongoing – Moderate	▪ Newell Region Municipalities ▪ Brooks and District Chamber of Commerce ▪ Alberta Ministries (Economic Development and Trade, Culture and Tourism, Labour) ▪ Calgary Commercial Real Estate Community ▪ Real estate representatives for specific companies that the region wishes to attract	▪ Budget of $7,000 - $25,000 depending on frequency of tours, level of travel and accommodation covered, and location of target audiences ▪ Staff time of Economic Development Officer ▪ In-kind contributions by partner organizations
Coordinate Trade and Investment Missions with Local Companies ▪ Through establishing relationships with provincial and federal trade representatives, identify opportunities to participate in target sector-specific missions ▪ Coordinate a group of local companies that have specific interests in market expansion and international trade opportunities and facilitate participation in mission activities along target sector lines ▪ Investigate programs to offset the cost of business participation in trade activities	Ongoing – Low	▪ Newell Region municipalities ▪ Alberta Ministries (International Trade and Jobs, Tourism and Skills Training) ▪ Local Industry and Business	▪ Budget can range from $20,000 to $100,000 depending on number of external events targeted and what collaborative funds can be leveraged through joint initiatives

4.6 Developing Ongoing After Care Supports

Recommended Initiative	Priority	Partners	Resources
Establish a Formal Business Retention and Expansion (BR&E) Program ▪ Investigate the purchase of Client Relationship Management (CRM) software to track inquiries and ongoing issues ▪ Identify all local businesses that operate within the target sectors and catalogue these through a database ▪ Leverage local knowledge and research to identify growth companies and important contacts ▪ Establish an annual corporate calling initiative that gathers intelligence and identifies company needs and challenges ▪ Coordinate local regulators to be prepared to respond proactively to expansion and location requirements	Ongoing – Moderate	▪ Newell Region Municipalities ▪ Brooks and District Chamber of Commerce ▪ Community Futures Brooks Office ▪ Community Futures Entre-Corp (Medicine Hat)	▪ Budget of $10,000 which can include CRM licencing for one user and local travel and networking expenses ▪ One time fees may be associated with buying into CRM systems or purchasing new licencing

Recommended Initiative	Priority	Partners	Resources
Develop After Care Program ▪ Coordinate local business, immigration, and workforce development services to provide timely integration and a soft landing platform ▪ Create a local welcoming program for businesses that includes local politicians and dignitaries ▪ Assemble a group of various business services including accounting, taxation, finance, and legal professionals that can support business establishment in Canada ▪ Streamline new companies into the Business Retention and Expansion (BR&E) program for ongoing support and plan opening celebrations if desired (including local media exposure)	Ongoing – Moderate	▪ Newell Region municipalities ▪ Brooks and District Chamber of Commerce ▪ Local Immigration Partners ▪ Workforce Development and Employment Partners	▪ Staff time of Economic Development Officer ▪ In-kind contribution of partner resources ▪ Minor local travel expenses ▪ Potential minor marketing and promotional costs

Appendix A: Document Review

Economic Documents

City of Brooks and County of Newell Economic Profile[16] (2016)

The report highlights the economic opportunities and current economic drivers for the City and the County. Critical to Brooks' success has been that it is strategically located between Calgary, Medicine Hat and Lethbridge, and is the largest urban centre within 100km. The City is also a growing transportation hub, with close proximity to the TransCanada Highway, Highway 36, the Brooks Airport and the CP Rail mainline.

The region's economy is supported by a young, educated workforce, significant agricultural crop quality, and a growing sports tourism industry. The County has also made significant investments in roads, sports and recreation facilities as well as infrastructure. The City of Brooks and the County have developed joint Economic Development services to support entrepreneurship, business retention and expansion (BR&E), investment attraction as well as marketing, promoting and branding. This ensures that services are not duplicated, creating a more efficient economic development ecosystem. This also supports decreased competition between the communities within the County, allowing the County to work to support its local economy in a cohesive manner. Important incentives that help to create a unique environment within the County include:

- Participating in the Rural Physical Action Plan by offering residents secure family doctors by offering comprehensive and enhanced rural medical services, education, and recruitment
- Supporting a healthy agriculture and oil and gas industry, including a number of agriculture-related R&D facilities and food processes facilities
- Creating an innovative and vibrant manufacturing sector, supported by high-quality welders to allow for custom steel fabrication
- Establishing a shop local campaign, the Newell Proud campaign, to help raise the profile of local businesses and increase awareness of the diversity of goods produced within the region
- Creating an industrial and commercial real estate database, Navigate Newell, which also contains information related to demographics and industry breakdowns to support development and investment attraction opportunities

These services and assets will be further explored and examined in order develop a fuller picture of the investment readiness situation in County of Newell and the City of Brooks.

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[16] City of Brooks and County of Newell, Economic Profile. Retrieved from: http://www.brooks.ca/DocumentCenter/View/938

City of Brooks and County of Newell Regional Profile[17] (2016)

The City of Brooks and County of Newell created a regional profile, highlighted key community and lifestyle assets. As of 2014, the City of Brooks has 5,840 private dwellings while the County has 3,184. This shows the important Brooks has in supporting the broader region. Brooks has recognized the importance of diversity and multicultural opportunities and is the home to residents who speak over 100 languages. The presence of strong physical quality of life assets help to attract residents to the City and to the region, helping to also attract businesses and industry investment.

In examining the key industries in the County and Brooks, the mining and oil and gas extraction and manufacturing industry are the largest sectors of the economy. These sectors are supported by a robust urban infrastructure, access to major transportation corridors (e.g. Hwy. 1 and Hwy. 36), and competitive tax and utility rates. The quality of business support offered by both the County and the City are important in supporting existing businesses as well as attracting new businesses to the area. This will be further examined throughout the Investment Readiness Study.

2016 Business Survey and Action Plan (2016)

The City of Brooks and the County of Newell undertook a business survey in 2016. The survey looked at opportunities to make the Newell Region a better place to do business. Of the 182 respondents, 171 (93.96%) indicated that their business existed in the City of Brooks rather than other areas within the Newell region. The majority of respondents indicated that the region was a good place to do business. More specifically they indicated that their clientele and the location of Brooks are key assets for the region. Challenges identified by businesses include high taxes, the availability of labour, and the costs of advertising. Respondents were also asked to identify areas for improvement to create a better business environment in the region. Opportunities include:

- Supporting downtown businesses, including improving the look of the downtown business district and expanding the range of stores
- Diversifying industry, employers, and the population
- Supporting advertising initiatives of local businesses to help them reach a wider audience
- Providing affordable rental opportunities for smaller businesses
- Reviewing bylaws and regulations to make them more business friendly

Following the Business Survey, the City and County developed a series of action items to be accomplished in 2016-2017. Primary actions include utilizing local contractors to a greater extent by reviewing purchasing policies and establishing a contractor cluster, as well as encouraging new businesses by improving the permitting process and improving customer service. Secondary areas of focus include reviewing fees related to business, creating regional and economic profiles (accomplished already), and

[17] City of Brooks and County of Newell, Regional Profile. Retrieved from: http://www.brooks.ca/DocumentCenter/View/935

promoting the area to qualified and quality employees while also working with the local Medicine Hat College campus.

The action plan also puts forward the opportunity to compare Brooks with similar communities in the area to address the concern raised by residents in the business survey on the high cost of living and taxes. This effort, as well as the opportunity to promote the region, will be further explored throughout the Investment Readiness Study.

Brooks Municipal Census (2015)

In 2015, the City of Brooks completed a municipal census. 8,018 residents indicated that they have lived in the City for more than five years, of which 3,597 residents have only ever lived in Brooks. According to the census, 2,275 residents indicated they lived outside of Canada prior to moving to Brooks. This illustrates that the City is home to a high number of immigrants, bringing new talent and culture to the City, adding new vibrancy. The census also captured information about the age of residents. The largest age categories, according to the census, were 35-39 (1,041), 30-34 (1,176), 40-44 (1,058), and 5-9 (1,041). Looking at figure 1 in the base analysis, this trend in age cohorts is also seen in both 2006 and 2011. This shows that the City has a high number of working-age population to support the 5,643 residents indicated that they were employed full-time, while 824 residents indicated that they were either looking for employment or were unemployed. 1,331 residents responded that they were employed in an occupation related to processing, 736 residents were employed in managerial, administrative or related occupations and another 674 residents in mining and quarry (oil and gas field employment).

Planning Documents

This section looks specifically at planning-related documents, policies, and bylaws.

City of Brooks Municipal Development Plan (2001)[18]

In fulfilment of requirements Municipal Government Act (2000), the Municipal Development Plan (the Plan) is designed to ensure stakeholders and adjacent municipalities are aware of the types and locations of development acceptable to the Town of Brooks. The Plan puts a projected growth of the population to approximately 20,000 by 2031.

The Plan acknowledges a leadership role for the Town in local economic development planning. Links are made between economic development and the development of effective policies regarding infrastructure and servicing arrangements, land use, and financing. An emphasis is also placed on continuing to ensure Brooks is attractive to investors and outlines a need for an economic development strategy to identify strengths and weaknesses that face Brooks, and opportunities for moving forward. Key geographic assets identified in regard to economic development include the Trans-

[18] Town of Brooks, 2001, Bylaw No.00/19 A Bylaw of the Town of Brooks in the Province of Alberta to Adopt a New Municipal Development Plan for the Town of Brooks, March 19.

Canada Highway and CP Rail mainline, which passes through the south part of the community.

The Plan also lists a series of guiding principles:

- Promote social and economic wellbeing
- Advocate complete community concepts
- Encourage a variety of quality housing
- Promote environmental stewardship
- Provide high-quality community services
- Support inter-municipal co-operation

A Town vision is also provided:[19]

> The Town of Brooks will be a green oasis and a safe, appealing, well planned, and economically diverse community where all citizens enjoy a high quality of life through innovative community facilities, programs and services, parks, effective transportation, attractive commercial development, a vibrant central business area and a variety of integrated housing.

The Plan suggests the economic development strategies should be focused on the strengths of the local landscape, including local businesses, skills and investment as well as supporting economic diversification through a mix of industries and sectors. It also suggests that the City should develop an Economic Development Strategy focused on the needs of the future including establishing partnerships with businesses, organizations, and neighbouring municipalities. Economic development goals and objectives for Brooks, as outlined in the Plan include, encouraging the retention of existing businesses in the community, explore a "made-in-Brooks' model for economic growth, work with local partners to explore economic development options and maximize the benefit of the City's proximity to transit corridors. These principles have largely already begun to be explored and established, as is the case of Economic Development Framework as well as the partnership with the County to deliver economic development services.

County of Newell Municipal Development Plan (2010)[20]

The County of Newell last updated its Municipal Development Plan (the Plan) in 2010, which is more recent than the City of Brooks. The County's stated vision is "To encourage and support sustainable growth and quality of life with the County of Newell."

Its mission statement is, "The County of Newell through leadership and policy provides services, structure and stability." For the County's economy, a series of objectives are listed in the Plan, including:

- To expand and diversify the local economy

[19] Ibid, p.20.

[20] County of Newell No. 4 (2010) Municipal Development Plan Bylaw No.1705-10, Consolidated to Bylaw 1761-13 (updated in 2013).

- To create a positive municipal environment that encourages and supports business
- To ensure that industrial and commercial development is done in a manner that reduces conflict with other uses
- To encourage home-based businesses

Emerging from the objectives are a series of policy areas, of which a primary aspect establishes that land use decisions are expected to reduce the negative impact of commercial and industrial development on existing land uses. This may represent a desire to reduce industrial and commercial land use availability due to previous complications encountered. The undertone of the document is generally focussed on ensuring a diverse small business base is prioritized.

City of Brooks/ County of Newell Intermunicipal Development Plan (2009)[21]

In accordance with the Municipal Government Act (2000), the Intermunicipal Development Plan (IMDP) provides a policy to guide future land use and development as well as other matters related to the physical, social or economic development of Brooks and the County of Newell. This Plan builds off the 2004 Intermunicipal development Plan, which outlined general land use policies for residential, commercial, agricultural, and industrial uses, among others. The IMDP recognizes the social and economic connects as well as land use considerations between the City of Brooks and the County of Newell as well as the city's connections to Medicine Hat and Calgary. In total, the IMDP area covers 16,302 acres, as seen in Figure 21, outlined in red.

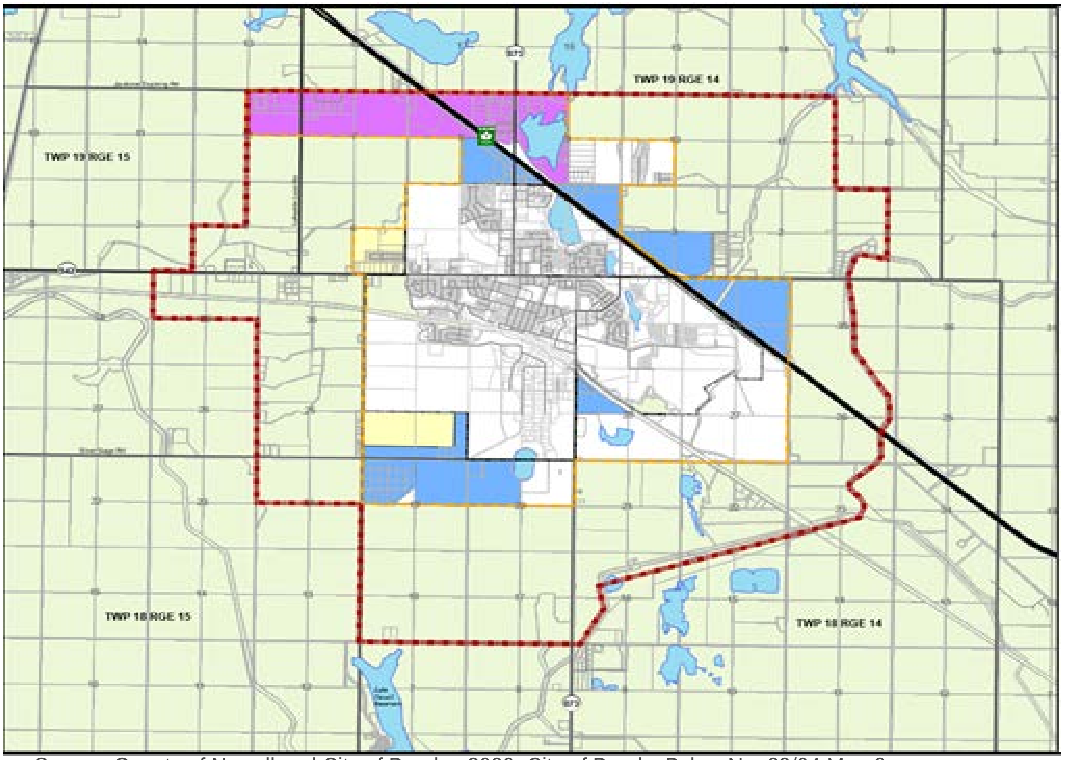
The objectives of the IMDP are to:

- Create a plan that adds value to the planning and development process in the County of Newell and the City of Brooks
- Identify the growth strategies of the City of Brooks and ensure that these growth strategies are compatible with the development and land use policies of the County of Newell
- Ensure that highway corridors and entranceways present a positive and welcoming image for the City and the County while maintaining a safe and efficient road network

The IMDP outlines policies related to transportation, recognizing that some transportation related issues lie outside the boundaries of either the City of Brooks or the County of Newell. Source: County of Newell and City of Brooks, 2009, City of Brooks Bylaw No. 09/04 Map 2.

[21] County of Newell and City of Brooks, 2009, City of Brooks Bylaw No. 09/04.

FIGURE 21: FUTURE LAND USE GUIDE, 2009



Source: County of Newell and City of Brooks, 2009, City of Brooks Bylaw No. 09/04 Map 2

The area outlined in black in Figure 21 illustrates the municipal boundary for the City of Brooks. The area outlined in red illustrates IMDP Plan Boundary while the area outlined in yellow illustrates the focused development boundary of the IMDP. The Map outlines the designated future services residential (dark blue) and non-residential (yellow) as well as unserviced rural non-residential (pink) areas. The bolded black line shows the path of Highway 1.

The IMDP outlines four non-agricultural uses, of which the Potential Serviced Non-Residential Development land use policies are of the most interest. These policies recognize that industrial and commercial development, are occurring and may require servicing. The IMDP discourages the developed of grouped industrial or commercial uses in the areas that cannot be easily serviced by municipal infrastructure. The other non-agricultural uses identified include:

- The Brooks Urban Fringe- lands currently found in the IMDP Boundary which is currently used for agricultural production or limited-non-agricultural uses but will remain predominantly agricultural in use
- Potential Serviced Urban Residential Development- lands which are intended to be developed for residential purposes at urban standards
- Potential Unserviced Rural Non-Residential Development- lands which are intended to be developed for rural industrial and commercial

purposes

While the IMDP largely provides for the future land use within the City of Brooks, it also relates to the social and economic development of the area. By shaping the future connections between land uses, including agriculture, commercial and residential, the IMDP plays an important role in connecting people to services.

City of Brooks Land Use Bylaw 14/12[22] (2016)

The City's land use bylaw was adopted in 2014, with amendments added as recent as April 2016. The bylaw outlines three commercial districts:

- Commercial Central- supports the existing mixture of residential, commercial and other uses that currently take place in the City's historic downtown. This allows for a mix of uses, including offices, cafes, upper storey units, and art studios.
- Commercial General- allows for the development of a wide variety of commercial uses which benefit from a high level of exposure and the travelling public. This allows for a wider range of businesses, including medical clinics, major retail establishments, and warehouse storage.
- Commercial Neighbourhood- provides commercial uses to locate within a primarily residential area. This designation allows for less as-of-right uses, restricting businesses to those that are compatible with and are complementary to the daily needs of residents (e.g. cafes, day care, minor retail).

The Bylaw also identifies three industrial districts:

- Industrial light- allows for a variety of industrial developments that may associate with nuisances such as noise, odour, or vibrations. This includes repair shops, gas bars, and light manufacturing.
- Industrial General- provides space for industrial uses which are complementary but secondary to commercial activities and are sensitive to the impact of the primary industrial or secondary commercial uses in the surrounding area. Uses include contractor services, lumber yards, and outdoor storage.
- Industrial Heavy- allows for a variety of heavy industrial development, which has the greatest impact on-site regarding noise, odour, and vibration.

Bassano Land Use Bylaw 865/16[23](2013)

The Town's land use bylaw was consolidated in 2016. The bylaw outlines the goals and permitted uses under a commercial, highway commercial and industrial commercial district. Key considerations include:

- Commercial District- intended to accommodate retail, service, and office uses which cater to the needs of Bassano residents, within the town's central business district
- Highway Commercial- accommodates retail and other uses which serve the motoring public

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[22] City of Brooks, 2016, Land Use Bylaw 14/12.

[23] Town of Bassano, Land Use Bylaw 865/16

- Industrial Commercial supports industrial, warehousing, and commercial uses which require large lots, special siting and or services

Village of Duchess Land Use Bylaw[24] (2013)

The Village's land use bylaw outlines the vision for long-term community development for Duchess. This includes the use of a commercial and an industrial commercial district. Key considerations for these districts include:

- The Commercial District is located in the central business district and allows for retail, business and professional offices, restaurants, and accommodations, along with other uses
- The Commercial Industrial District is intended for light industrial uses and commercial services, including storage and warehousing, office buildings, farm equipment sales, manufacturing, along with other uses

Village of Rosemary Land Use Bylaw 404/08[25] (2016)

As outlined in the Land Use Bylaw, Rosemary is home to a commercial and a light industrial district. Permitted uses for each district include, but are not limited to:

- Commercial district- offices, retail, restaurants, personal service business and social care facilities
- Light Industrial District- all permitted uses of a Commercial District as well as light manufacturing and assembly, grain elevators, agricultural equipment sales and services, public and private schools as well as lumber yards

City of Brooks Area Structure Plans (n/d)

The City of Brooks has four Area Structure Plans (ASPs) which provide a policy framework to support existing development and guide future development (residential and non-residential). Captured in the table below is the information related to commercial development in each of the four ASPs.

[24] Village of Duchess, Land Use Bylaw

[25] Village of Rosemary, Land Use Bylaw 404/08

FIGURE 22: AREA STRUCTURE PLANS RELEVANT TO NON-RESIDENTIAL LAND IN THE CITY OF BROOKS

ASP	Land Use
Northeast Sector	▪ Commercial services occur along the periphery of the Plan Area along 2nd Street W and Cassils Road ▪ No direct access to the TransCanada Highway which limits future development possibilities within those portions of the Plan Area adjacent to it • The TransCanada Highway acts a physical barrier to urban growth and there is a need to properly plan development in the vicinity of this highway ▪ The Municipal Development Plan identified 2nd Street West as a key entranceway to the municipality and that adjacent lands should be supported as the primary commercial area for the community
Northwest Sector (2007)	▪ A commercial node is established which encompasses the area north of the former mall fronting Cassils Avenue Upland Boulevard. ▪ Neighbourhood commercial is situated at key intersections in the Plan Area and is kept to a minimum to reduce the likelihood of non-compatible development adjacent to each other ▪ Develops a vital and attractive commercial centre to not only meet the shopping needs of residents of the Plan Area but also the general community ▪ Encourages walking and cycling within and between Neighbourhoods as an alternative mode of travel, particularly for shorter, internal trips ▪ Approximately 66 ha (162 acres) of land will be available for commercial development in this area of the community, which provides sufficient commercial land base to serve community needs into the future ▪ Gateway Commercial Area predominant land use will be commercial uses, primarily retail and those uses serving the travelling motorist
South Industrial **(2004)**	▪ The Plan provides policies for industrial, business park and institutional land development ▪ Develops a long-term land use concept in which present and future demand for industrial land can be accommodated ▪ Provides for the development of light, medium and heavy industrial development in an environmentally sound and economically efficient manner ▪ Ensures that the opportunity for ancillary commercial land uses is available within the Plan Area ▪ The business park provides an area comprised of industrial land uses that can be conducted entirely within buildings that are compatible with surrounding development
Southeast Sector **(2004)**	▪ Commercial development within the Southeast Sector is contemplated to include: (1) highway commercial, (2) neighbourhood commercial, (3) business park, and (4) commercial industrial ▪ Highway commercial development will be promoted as an important element of the municipality's long-term supply of commercial land ▪ Only those commercial uses that are compatible and appropriate adjacent to residential areas will be permitted ▪ Neighbourhood commercial will be limited to convenience commercial, personal services, and support offices to home-based businesses ▪ Business park uses will be limited to such uses as business services, research and development, and communications and accessory activities or other similar businesses
Southwest Sector **(1999)**	▪ There are two commercial sites planned within this ASP (westerly and easterly), developed as small localised shopping facilities which support the day to day needs of the community

Sources: City of Brooks, Northeast Sector Area Structure Plan, n.d; City of Brooks, Northwest Sector Area Structure Plan, Jan 2007; City of Brooks, South Industrial Area Structure Plan, Sept 2004; City of Brooks, Southwest Area Structure Plan, Jan 2004; City of Brooks, Southwest Area Structure Plan, July 2014.

Quality of Life Documents

City of Brooks Quality of Life Snapshots, 2014[26]

In 2011, the Grasslands Regional FCSS conducted a Regional Quality of Life Review, featuring 8 Snapshots of local municipalities, and hamlets within the County. The City of Brooks' Quality of Life Snapshot acts as an opportunity to determine gaps between factors of importance and satisfaction as well as gather information to measure the level of satisfaction with social programs, services, and conditions for residents. Its content is based largely on survey results in combination with supplemented data derived from various external sources. The end result is a Snapshot that functions as a community profile centred on quality of life and quality of place attributes and attitudes.

Three negative gaps were identified (health, economy and employment, and political rights and general values) and four positive gaps were indicated (social program/social condition, personal well-being, sense of community, physical environment). The findings highlight overall, Brooks is a good community to live in from a programming and community perspective, but has important gaps in terms of economic opportunity and servicing. Important to note, for all ages both health services and economy and employment ranked as a negative gap and health remained at top importance for all age groups. 77% of respondents were satisfied with health services in Brooks. The negative gap in healthcare may be attributed to access to transportation or wait times rather than access to the services themselves. Access to transportation for residents without private vehicles was identified as a gap in the City and the region as a whole.

Quality of place data was also collected. Retail and shopping received the most negative responses, across all age groups. Green spaces and sports and leisure facilities, on the other hand, had the highest percentage of satisfied responses, followed by both neighbourhood design and heritage structure. This indicates that the City is doing a good job in developing policies that create opportunities for the public to engage with (e.g. heritage structure, green spaces) but has been less successful in attracting retail and shopping experiences. This highlights an important opportunity for the future of Brooks, helping to recognize the need to attract more retail businesses to the City and encouraging more residents to shop locally.

Important to note, not all gaps can be addressed by the City of Brooks alone. A multi-sector approach, involving a variety of actors working together to identify and resolve issues, offers an opportunity to increase the resources and expertise to addressing current gaps.

[26] City of Brooks, 2014, Quality of life.

Newell Region Youth Community Action Plan[27] (2016)

Following the closure of the Ashton's Place Youth Centre, facilitated the plan to conduct research and determine youth out of school programming and activities based on feedback from both youth and the community as a whole in the Newell Region. The research for the Youth Community Action Plan (YCAP) was carried out in four phases:

1. Youth Out-of-School Activities Survey and Follow-Up Discussion
2. Youth Community Action Plan Forum
3. Newell Region Youth Community Action Plan recommendations for Action
4. Implementation of Action Priorities

The survey revealed that the top three out of school activities are hanging out with friends, homework and watching Netflix. Fun and physical activity were the top two choices for getting involved in out of school activities. Family and friends were highlighted as the top resources for finding out about both volunteering and extra-curricular programming. Stemming from the Forum, six opportunities were identified as key action steps, of which three were included in the Implementation of Action Priorities. This includes:

- Creating an Action/Resource Committee, this will be used to form partnerships and pool resources of YCAP. The committee will build on the recommendations of the YCAP Forum.
- Establishing a Youth Network, which will bring the youth from the region together and provide them with opportunities to discuss and determine realistically targeted programs, activities, and other initiatives which will build resiliency and leadership
- Developing a Youth Website and App which will coincide with the creation of the youth network. This will provide an opportunity for youth serving groups and organizations to post their youth activities online for easier access.

Youth programming is a critical component of the quality of life for both parents and young students in the region, providing opportunities to socialize, volunteer, and gain skills in a non-school setting. As such, these actions should be monitored going forward to ensure that the desired outcomes of each of the initiatives are being achieved. Monitoring will also help highlight possible areas for improvement or spin-off projects throughout the Newell Region to support youth programming.

27 Newell Region, 2016, Youth Community Action Plan.

Appendix B: Economic Profile

The Newell Region represents a nuanced landscape of communities of various sizes. Several formal municipalities function collectively on the economic development front, and therefore discussions must represent these diverse communities as fully as possible when describing the regional economy. Data used in the sections below are derived from Statistics Canada's 2006 and 2011 Canadian Census, the 2011 National Household Survey (NHS), and from Canadian Business Patterns (CBP) data from 2008, 2013, and 2015.

A key challenge associated with some of these data sources, particularly in regard to NHS and CBP data, is that not all formal municipalities are captured in data sets released by Statistics Canada. Brooks is the most reliable and consistent source of data from all the sources because it is the largest urban area in the municipality. Bassano appears in some data, but not in others, as is the case for Duchess. Rosemary does not emerge at all except for in population statistics associated with the Canadian Census (2006 and 2011). Also, the way in which County of Newell was classified in 2008 and 2013 changed between these years, leading to an inability to track trends for the County specifically. There are numerous small hamlets that are also included within County of Newell. These include Bow City, Cassils, Gem, Lake Newell Resort, Patricia, Rainer, Rolling Hills, Scandia, and Tilley. Therefore, the hamlets noted here are counted within the data for County of Newell; however, with some variation from year to year as they pertain to CBP data.

Wherever possible, the complete range of data available for all communities is used; however, it is necessary to reiterate that not all communities have sufficient or comparable data. The best is done with the data sources available, which means that Brooks is most often cited, but all others are also included where the information exists.

Demographics

In 2016, the City of Brooks has a population of 14,451, an increase of 5% since 2011. This reflects a continuous trend of population growth since 2001, increasing a total of 13% over the 10 year period.

According to Census data, Brooks' population increased at a slightly lower rate than Alberta overall between 2006 and 2011 (see Figure 24); however, Brooks has experienced positive population growth. One area of potential concern is the drop in people aged 10 to 25, which suggests future labour force components may be constrained. On the other hand, there was notable growth in 30 to 45 age groups, indicating a strong core of established professionals.

With a population of 7,524, the County of Newell's population has increased in population since 2011, an increase of almost 10%.

The Figures below indicate data taken from the 2011 National Household Survey. Similar information from the 2016 Census is expected to be released throughout 2017.

FIGURE 23: POPULATION CHANGE, 2006 TO 2011 FOR BROOKS AND ALBERTA

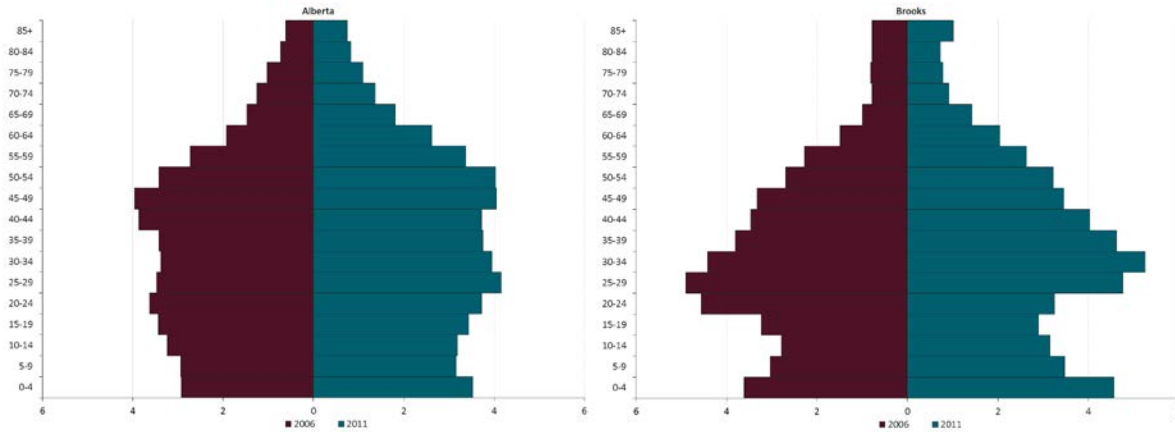
	2006		2011		Brooks		Alberta	
	Brooks	Alberta	Brooks	Alberta	2006-2011 Change	% Change	2006-2011 Change	% Change
Total	12,500	3,290,350	13,675	3,645,260	1,175	9.40%	354,910	10.79%
0 to 4 years	945	202,595	1,195	244,880	250	26.46%	42,285	20.87%
5 to 9 years	795	204,115	910	218,990	115	14.47%	14,875	7.29%
10 to 14 years	730	224,805	825	220,920	95	13.01%	-3,885	-1.73%
15 to 19 years	845	237,900	760	238,205	-85	-10.06%	305	0.13%
20 to 24 years	1,195	251,380	850	258,475	-345	-28.87%	7,095	2.82%
25 to 29 years	1,280	240,530	1,245	288,735	-35	-2.73%	48,205	20.04%
30 to 34 years	1,155	234,305	1,375	274,390	220	19.05%	40,085	17.11%
35 to 39 years	995	237,845	1,210	260,135	215	21.61%	22,290	9.37%
40 to 44 years	905	268,290	1,055	258,515	150	16.57%	-9,775	-3.64%
45 to 49 years	870	274,740	905	280,635	35	4.02%	5,895	2.15%
50 to 54 years	705	237,465	845	279,705	140	19.86%	42,240	17.79%
55 to 59 years	595	189,260	690	233,785	95	15.97%	44,525	23.53%
60 to 64 years	390	133,705	535	182,160	145	37.18%	48,455	36.24%
65 to 69 years	260	102,410	375	125,700	115	44.23%	23,290	22.74%
70 to 74 years	205	86,920	240	94,775	35	17.07%	7,855	9.04%
75 to 79 years	215	71,475	205	76,040	-10	-4.65%	4,565	6.39%
80 to 84 years	205	50,320	190	57,725	-15	-7.32%	7,405	14.72%
85 +	205	42,295	265	51,485	60	29.27%	9,190	21.73%

Source: Statistics Canada, 2006 and 2011 Community Profiles.

In 2011, Brooks had a population of 13,675. In both 2006 and 2011, the under 40 are age groups represented the largest proportion of the population. The age group which experienced the largest increase between 2006 and 2011 was that between the ages of 65 to 69, which increased by 44.23%. This was a significantly larger increase compared to the provincial 65 to 69 age group. The age group which experienced the largest decrease in the City was that of 20 to 24 years, decreasing by 28.87%. The 15 to 19 year and 35 to 29-year cohort also experienced a decline in Brooks. This indicates that Brooks has issues retaining its youth and attracting youth back following post-secondary education. To this end, the City has to develop opportunities which support youth retention and youth-related employment opportunities to ensure that the City remains a community for all ages.

In looking back to Figure 24, the City's population is much more heavily concentrated in the age cohorts of 0 to 9 and 20 to 40 compared to the province. The lower median age indicates that Brooks has a high working age population, suggesting the possibility of future economic growth within the City. It also indicates that there is a need to child-oriented programs and services, to support the high under-10 population.

FIGURE 24: POPULATION PYRAMIDS FOR BROOKS AND ALBERTA, 2006 AND 2011



Source: Statistics Canada, 2006 and 2011 Community Profiles.

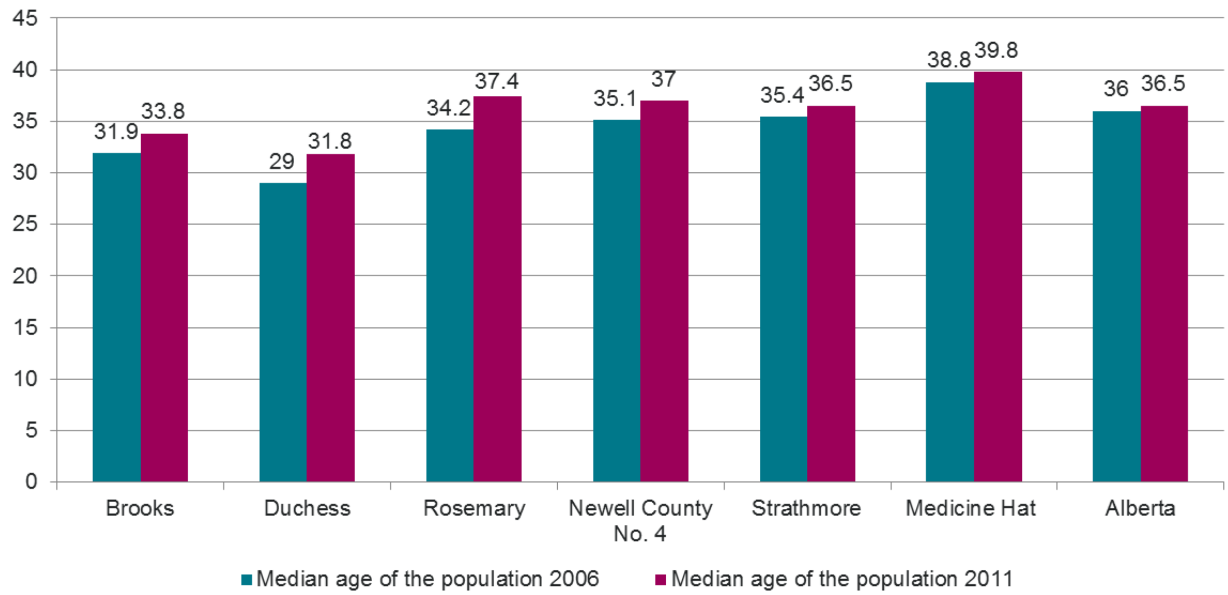
Alternatively, the data that summarizes the distribution of age groups for Brooks and the province, the use of median age distributions allows for the comparison of a larger set of communities at the same time. By comparing multiple communities in terms of median age, it is possible to understand whether the populations in the Newell Region are more youthful than comparators.

Figure 25 highlights the median age of Brooks, Duchess, Rosemary, County of Newell, and other comparator communities in the broader region and province. Also shown is the change from the 2006 census to 2011.

Most notable, Duchess and Brooks have lower median ages than Alberta. While Rosemary and the county were both below the provincial average in 2006, by 2011 they had surpassed it.

The data indicate that Brooks and Duchess have competitively low median population ages, particularly in comparison to Strathmore and Medicine Hat.

FIGURE 25: MEDIAN AGE, 2006 AND 2011



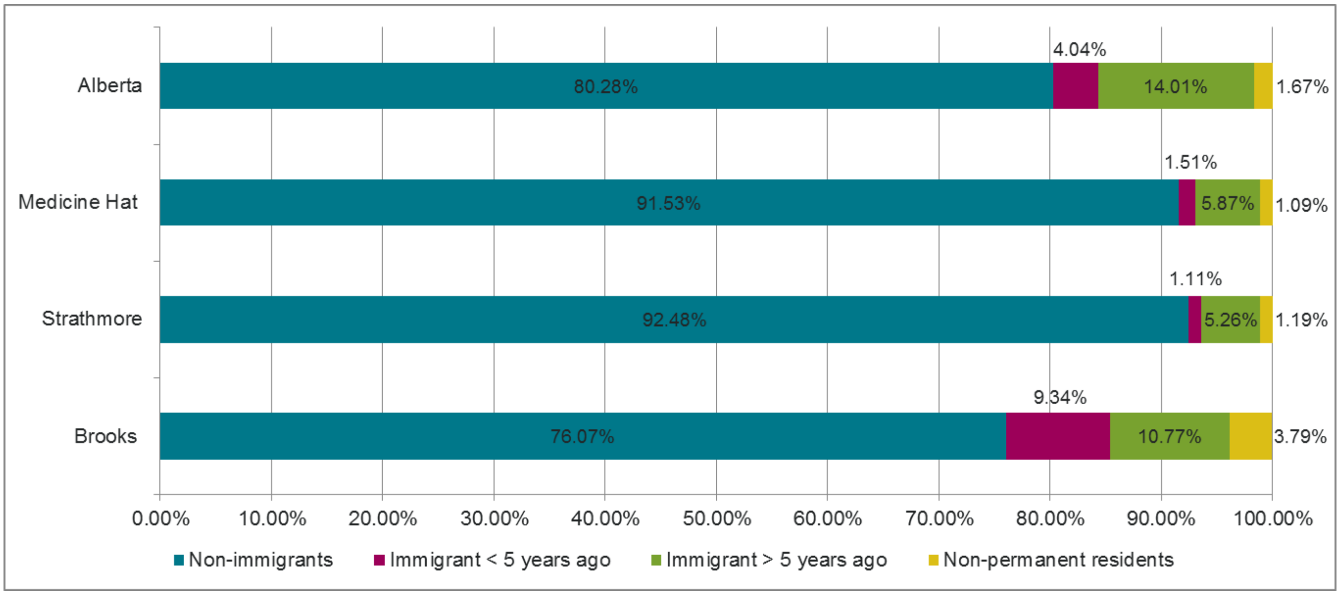
Source: Statistics Canada, 2006 and 2011 Community Profiles.

Migration

Brooks continues to see a growth of its immigrant population. Between 2006 and 2011, Brooks saw an increase of 600 immigrants, an increase of 22.4%. This is higher than the province, which only saw an increase of 18.2%, Strathmore (1.9%) or Medicine Hat (-.1%). Brooks had the highest proportion of immigrants who arrived less than five years ago compared to the province as a whole. This indicates that Brooks' businesses can draw on a significant proportion of working age immigrants and non-immigrants.

In 2011, Brooks had the highest proportion of immigrant and non-permanent residents compared to the other areas examined. The number of non-immigrants in Brooks decreased by 6.3% between 2006 and 2011. Brooks experienced a larger decrease in non-immigrant population compared to Alberta (2.7%) while Strathmore experienced an increase of 0.8% in its non-immigrant population.

FIGURE 26: MIGRATION LEVELS OVER THE PAST FIVE YEARS, 2011

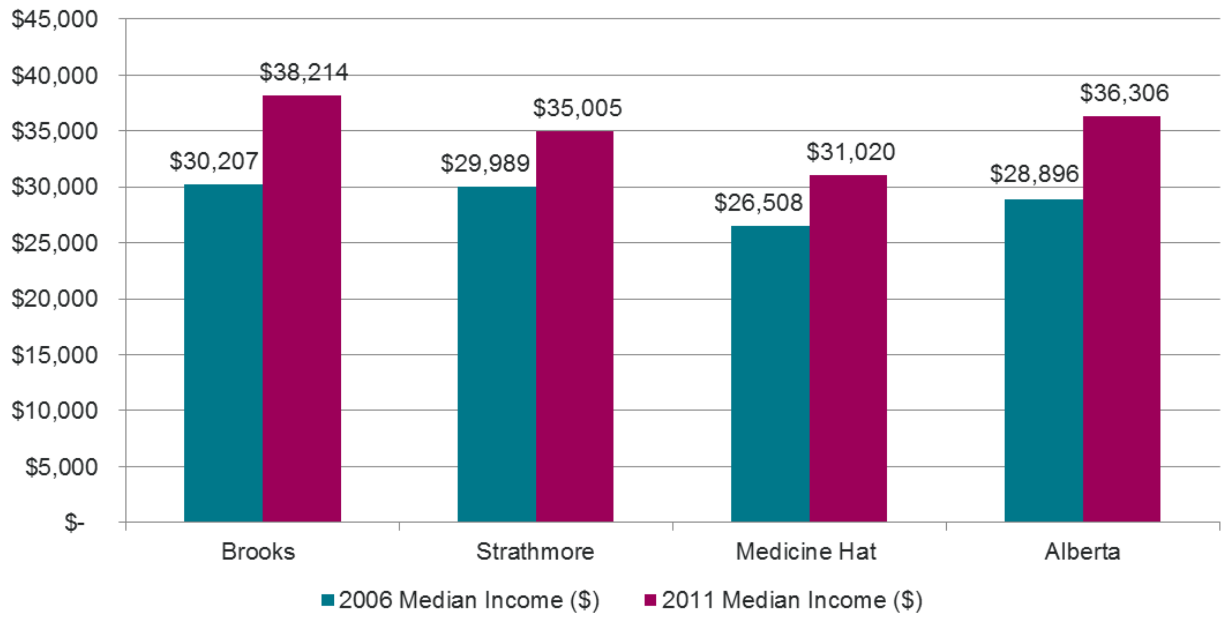


Source: Statistics Canada, 2011 National Household Survey.

Income Levels

Brooks had a higher median income compared to the other areas. In 2011, the difference between the City and the provincial median income was $1,908. Brooks had a significantly higher median income compared to Medicine Hat in 2011, a difference of $7,194. The City of Brooks also saw the largest increase in median income between 2006 and 2011 ($8,007). The increase in income and the higher median income compared to the other areas indicates that Brooks is well positioned for continued economic growth, as residents have more disposable income to support local businesses.

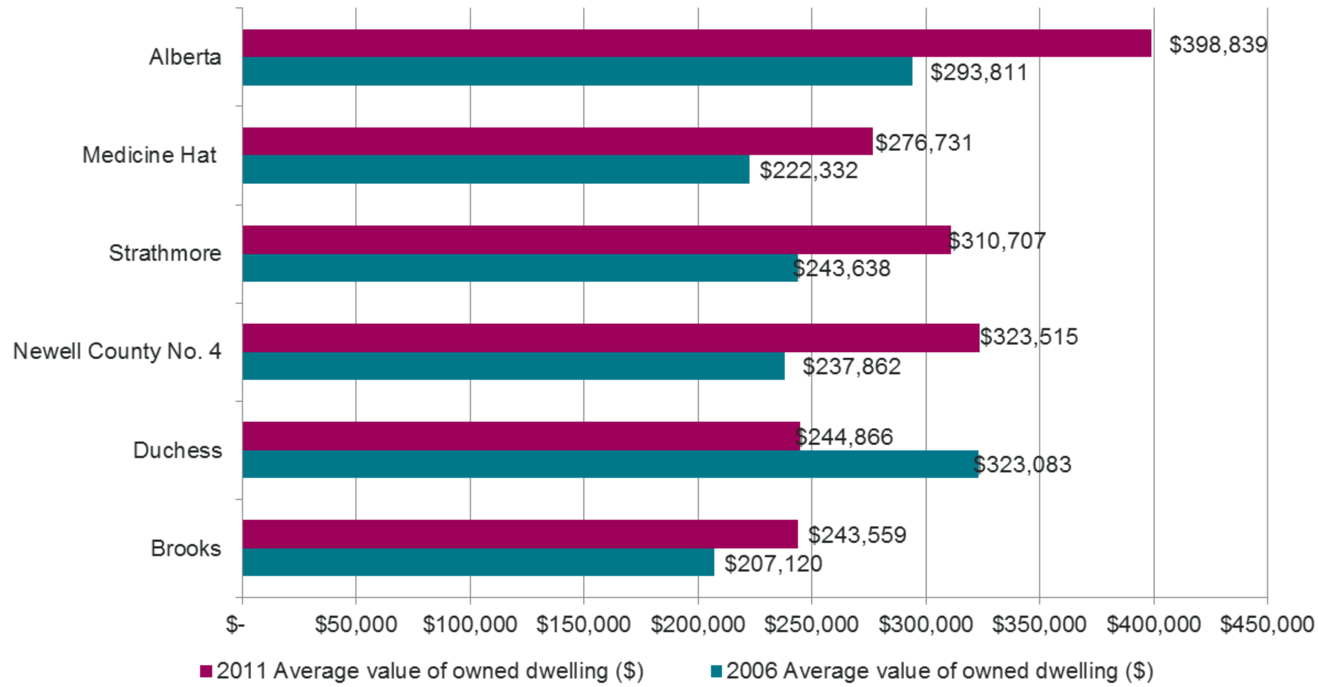
FIGURE 27: MEDIAN HOUSEHOLD INCOME



Source: Statistics Canada, 2011 National Household Survey, 2006 Community Profiles.

Figure 28 highlights the average value of dwellings. While the County of Newell's average dwelling value was lower than that of the provincial average in both 2006 and 2011 but remained higher than the other communities examined. The province saw the largest increase in average dwelling value, increasing by $105,028 between 2006 and 2011. The County and the Province experienced a 36% increase in the average value of dwellings, over the five-year period. The City of Brooks saw the smallest increase in average dwelling value, increasing by only $36,439 over the same period. This finding is interesting to compare to the median household income for Brooks and other areas investigated. Households in Brooks in 2006 and 2011 had the highest median incomes but the lowest average value of dwellings. This may indicate that the cost of living in Brooks in relatively low compared to the province as a whole. This is an important factor for attracting and retaining residents, youth, and businesses.

FIGURE 28: AVERAGE VALUE OF DWELLINGS

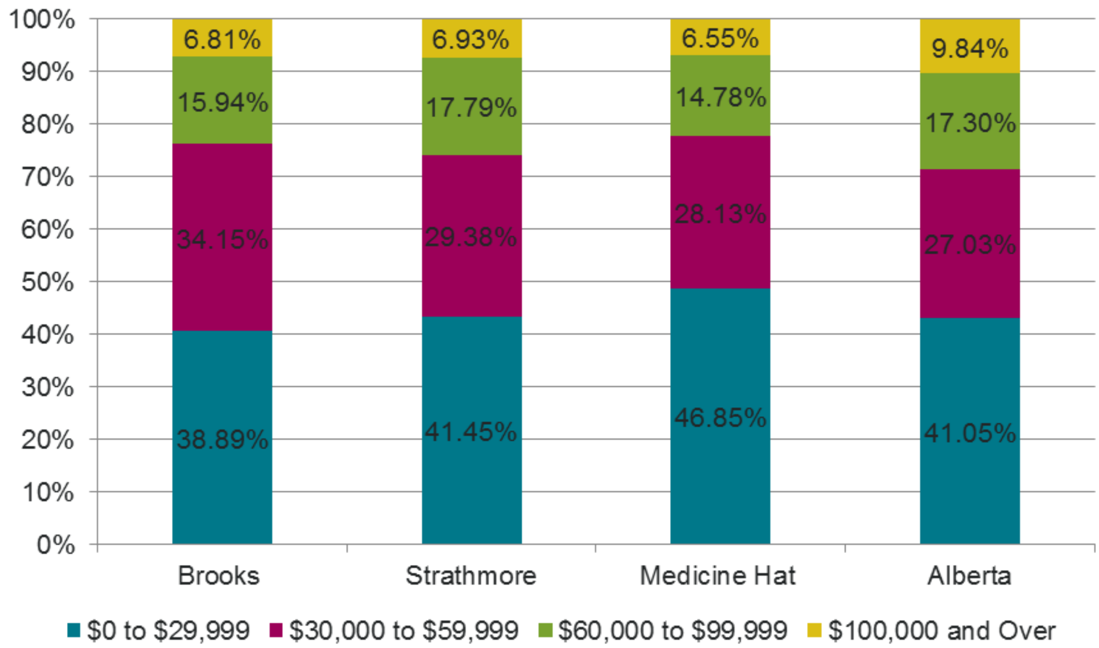


Source: 2006 Community Profiles, 2011 National Household Survey

In examining Figure 29, the City of Brooks has the highest proportion of residents with income between $30,000 and $59,999 compared to the other areas illustrates. For the highest income brackets, $60,000-$99,999 and over $100,000, Brooks had the second lowest proportions.

Just over 50% of Brooks' residents have an income in between $30,000 and $99,999. This is a higher proportion compared to the other areas. This finding coupled with the higher median income and low value of dwellings supports the conclusion that residents in Brooks have access to disposable income, which can be used for entertainment purposes (e.g. eating at restaurants, cinemas, and concerts) and support entertainment and arts and culture businesses in the City.

FIGURE 29: INCOME LEVELS, 2011



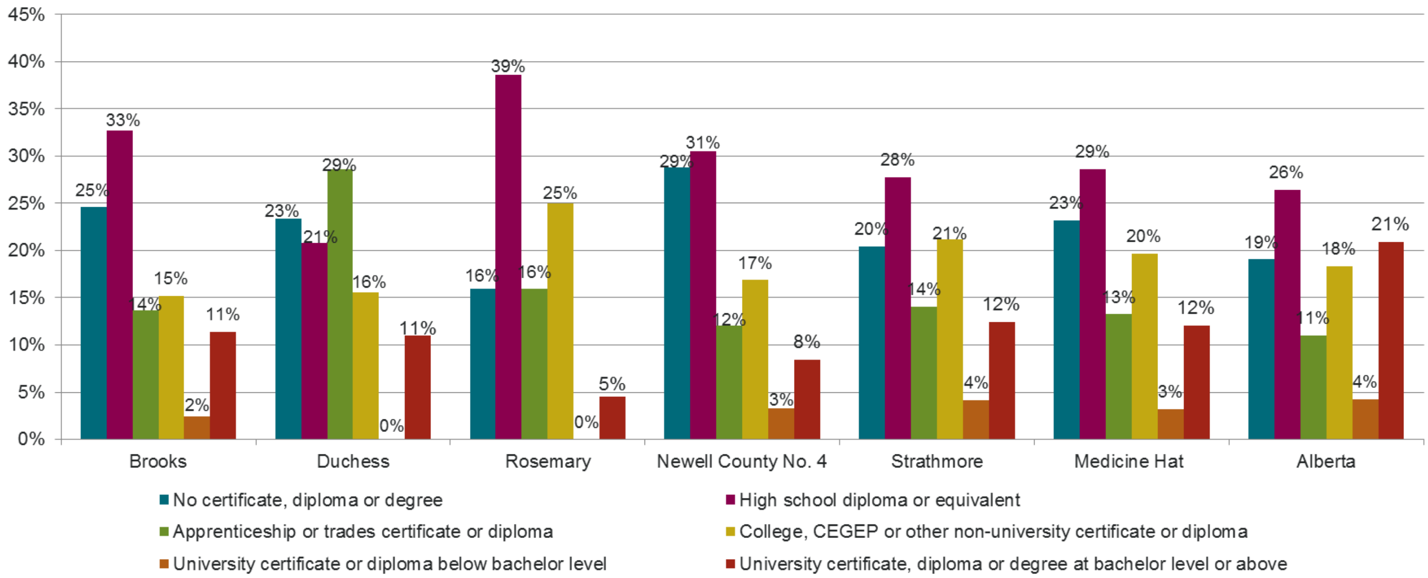
Source: Statistics Canada, 2011 National Household Survey.

Educational Profile

An educational profile is an important socio-economic indicator, which reveals the community's ability to adequately staff new and existing businesses. The County of Newell has a high proportion of residents with no certificate, diploma or degree (29%) as well as a high school diploma or equivalent (31%). In 2011, Brooks had the highest proportion of its residents with a high school diploma (33%) and apprenticeship or trades certificate or diplomas (14%) compared to the other areas examined and the second highest proportion or residents without a certificate, diploma or degree (25%). This indicates that the City is well positioned to capture trade based employment opportunities compared to the other areas examined.

Brooks has a higher proportion of residents with a university certificate, diploma or degree at the bachelor level or above compared to the County. This indicates that the City of Brooks is better educated than its surrounding communities, which helps to support broader economic development goals. However, the County does have a slightly higher proportion of residents with a university certificate or diploma below a bachelor level compared to Brooks.

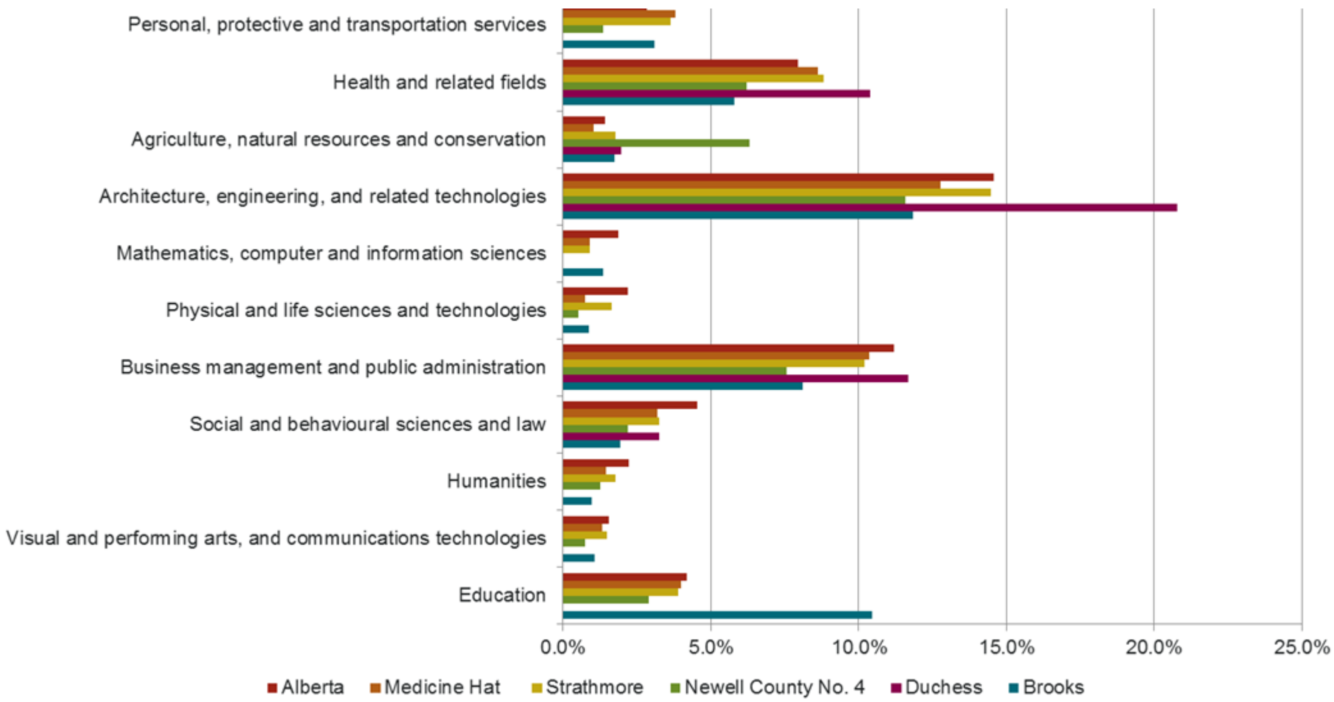
FIGURE 30: POPULATION BY EDUCATIONAL ATTAINMENT, 2011



Source: Statistics Canada, 2011 National Household Survey, Catalogue Number 99-012-X2011041

In examining the field of study, County of Newell had the highest proportion of its workforce educated in fields related to agriculture, natural resources and conservation (6.3%) compared to the other areas examined. The City of Brooks had a higher proportion of its workforce who studied education (10.4%) compared to the other areas examined. The largest number of Brooks residents are educated in the fields related to architecture, engineering, and related technologies (11.8%).

FIGURE 31: FIELD OF STUDY, 2011



Source: Statistics Canada, 2011 National Household Survey, Catalogue Number 99-012-X2011041

Workforce Profile

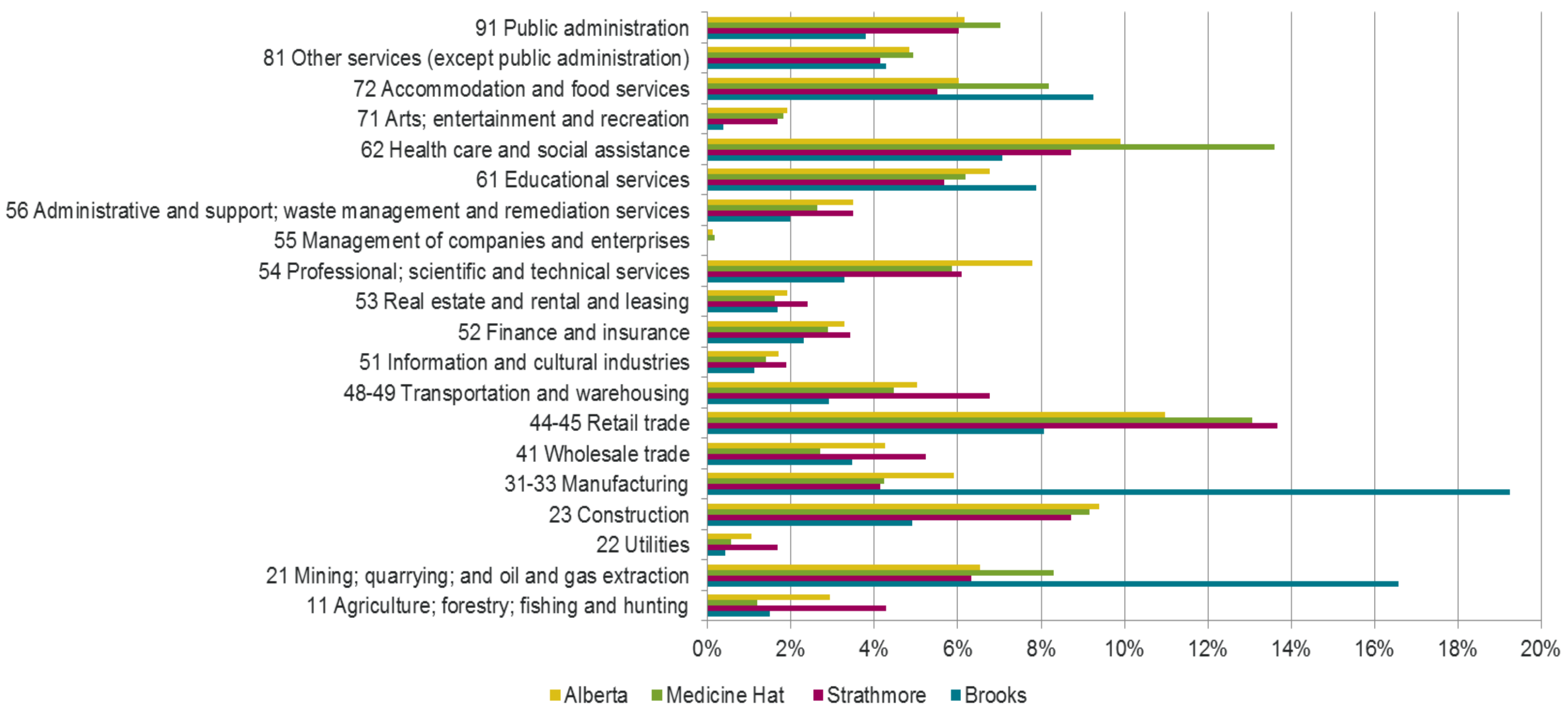
Trends in Local Occupations and Employment

In 2011, the City of Brooks had a labour force of 8,050, an increase of 3.3% or 255 people compared to 2006. This was a lower proportion increase compared to the province as a whole and Strathmore.

Labour Force by Industry

An understanding of the skills of the resident labour force by industry can provide an indication of the areas in which a community or jurisdiction can provide support to investment attraction and retention initiatives based on the industry-related skills of its labour force. The manufacturing industry employed the largest proportion of Brooks' population, 1,550 residents or 19%. The mining, quarrying, and oil and gas extraction industry are the 2nd largest industry in the City, employing 1,335 residents or 17%. There are higher proportions compared to Strathmore, Medicine Hat, and Alberta. The meat production manufacturing industry (1,460), support activities for mining and oil and gas extraction (980), and oil and gas extraction (230) comprise the largest employment sub-sectors in Brooks.

FIGURE 32: CLASS OF WORKER BY SECTOR (NAICS CATEGORIES), 2011



Source: Statistics Canada, 2011 National Household Survey

Overall, the labour force by industry in Brooks grew at a faster rate compared to Medicine Hat (0.4%), but at a lower rate compared to Strathmore (18.4%) and Alberta (8.3%). The manufacturing industry experiences an increase of 15 residents between 2006 and 2011, while the mining, quarrying, and oil and gas extraction industry experienced a decline of 100 residents or 7.0%.

Proportionally, the educational service industry experienced the largest increase between 2006 and 2011, growing by 86.8%. This finding is consistent with the data from Figure 31, which shows that education was the largest field of study for residents in Brooks in 2011. This was a larger proportion increase compared to the other areas examined. Both the accommodation and food services (67.4% or 300 residents) and the public administration (64.9% or 120 residents) industries also experienced larger proportional growth in Brooks compared to the other areas examined.

While the arts, entertainment and recreation industry (45.5%) and the utility industry (36.4%) experienced the largest proportion decrease in Brooks, the number of residents who left the field where relatively small, 25 and 20 residents respectively. Other services (except public administration) experienced the largest overall decrease, losing 150 residents.

FIGURE 33: WORKFORCE BY INDUSTRY, 2006 AND 2011

Industry (NAICS)	2006				2011				Brooks		Strathmore		Medicine Hat		Alberta	
	Brooks	Strathmore	Medicine Hat	Alberta	Brooks	Strathmore	Medicine Hat	Alberta	2006-2011 Change	% Change	2006-2011 Change	% Change	2006-2011 Change	% Change	2006-2011 Change	% Change
All industries	7,795	5,810	32,155	1,928,635	8,050	6,880	32,290	2,088,145	255	3.27%	1,070	18.42%	135	0.42%	159,510	8.27%
11 Agriculture; forestry; fishing and hunting	100	305	670	75,875	120	295	385	61,165	20	20.00%	-10	-3.28%	-285	-42.54%	-14,710	-19.39%
21 Mining; quarrying; and oil and gas extraction	1,435	410	3,180	134,620	1,335	435	2,680	136,500	-100	-6.97%	25	6.10%	-500	-15.72%	1,880	1.40%
22 Utilities	55	85	225	18,025	35	115	180	22,035	-20	-36.36%	30	35.29%	-45	-20.00%	4,010	22.25%
23 Construction	440	610	3,195	169,420	395	600	2,955	195,905	-45	-10.23%	-10	-1.64%	-240	-7.51%	26,485	15.63%
31-33 Manufacturing	1,535	450	2,050	138,365	1,550	285	1,365	123,465	15	0.98%	-165	-36.67%	-685	-33.41%	-14,900	-10.77%
41 Wholesale trade	300	240	1,040	85,510	280	360	870	89,000	-20	-6.67%	120	50.00%	-170	-16.35%	3,490	4.08%
44-45 Retail trade	765	705	4,215	206,655	650	940	4,220	229,225	-115	-15.03%	235	33.33%	5	0.12%	22,570	10.92%
48-49 Transportation and warehousing	305	330	1,310	98,870	235	465	1,440	104,770	-70	-22.95%	135	40.91%	130	9.92%	5,900	5.97%
51 Information and cultural industries	80	45	495	35,970	90	130	455	35,465	10	12.50%	85	188.89%	-40	-8.08%	-505	-1.40%
52 Finance and insurance	160	195	745	59,560	185	235	935	68,760	25	15.63%	40	20.51%	190	25.50%	9,200	15.45%
53 Real estate and rental and leasing	165	110	505	37,905	135	165	520	40,090	-30	-18.18%	55	50.00%	15	2.97%	2,185	5.76%
54 Professional; scientific and technical services	275	265	1,475	145,475	265	420	1,895	162,490	-10	-3.64%	155	58.49%	420	28.47%	17,015	11.70%
55 Management of companies and enterprises	-	-	45	2,585	-	-	55	2,535	0	-	0		10	22.22%	-50	-1.93%
56 Administrative and support; waste management and remediation services	145	125	975	71,365	160	240	850	72,965	15	10.34%	115	92.00%	-125	-12.82%	1,600	2.24%
61 Educational services	340	445	1,805	120,460	635	390	1,995	141,550	295	86.76%	-55	-12.36%	190	10.53%	21,090	17.51%
62 Health care and social assistance	495	400	3,460	175,200	570	600	4,395	206,695	75	15.15%	200	50.00%	935	27.02%	31,495	17.98%
71 Arts; entertainment and recreation	55	90	420	36,280	30	115	585	39,720	-25	-45.45%	25	27.78%	165	39.29%	3,440	9.48%
72 Accommodation and food services	445	410	2,685	127,630	745	380	2,645	125,810	300	67.42%	-30	-7.32%	-40	-1.49%	-1,820	-1.43%
81 Other services (except public administration)	495	360	1,950	99,050	345	285	1,590	101,275	-150	-30.30%	-75	-20.83%	-360	-18.46%	2,225	2.25%
91 Public administration	185	210	1,720	89,800	305	415	2,270	128,720	120	64.86%	205	97.62%	550	31.98%	38,920	43.34%

Source: Statistics Canada, 2011 National Household Survey, 2006 Community Profile

Figure 34 illustrates the location quotients by labour force for the City of Brooks, Strathmore and Medicine Hat in 2015.[28] The mining, quarrying, and oil and gas extraction and the manufacturing industry had a high concentration in Brooks. Both of these industry concentrations are higher than those in either Strathmore or Medicine Hat. This finding confirms the data in Figure 33 that the mining, quarrying, and oil and gas extraction and the manufacturing industry are critical sectors for the City of Brooks. The accommodation and food service sector also had a high concentration in 2015.

[28] Local concentration by location quotient (LQ). An LQ measures the concentration of business activity in a local area (e.g. Spruce Grove) relative to an over-arching area (e.g. Alberta). An LQ of over 1.25 suggests a local relative concentration of activity. In theory, this suggests the local sector is exceeding local demand, and exporting products/services to areas outside of the local community. A sector LQ of less than 0.75 suggests a gap area

FIGURE 34: LOCATION QUOTIENT BY INDUSTRY

Industry (NAICS)	Brooks	Strathmore	Medicine Hat
11 Agriculture; forestry; fishing and hunting	0.51	1.46	0.41
21 Mining; quarrying; and oil and gas extraction	2.54	0.97	1.27
22 Utilities	0.41	1.58	0.53
23 Construction	0.52	0.93	0.98
31-33 Manufacturing	3.26	0.70	0.71
41 Wholesale trade	0.82	1.23	0.63
44-45 Retail trade	0.74	1.24	1.19
48-49 Transportation and warehousing	0.58	1.35	0.89
51 Information and cultural industries	0.66	1.11	0.83
52 Finance and insurance	0.70	1.04	0.88
53 Real estate and rental and leasing	0.87	1.25	0.84
54 Professional; scientific and technical services	0.42	0.78	0.75
55 Management of companies and enterprises	0.00	0.00	1.40
56 Administrative and support; waste management and remediation services	0.57	1.00	0.75
61 Educational services	1.16	0.84	0.91
62 Health care and social assistance	0.72	0.88	1.38
71 Arts; entertainment and recreation	0.20	0.88	0.95
72 Accommodation and food services	1.54	0.92	1.36
81 Other services (except public administration)	0.88	0.85	1.02
91 Public administration	0.61	0.98	1.14

Source: Statistics Canada, 2011 National Household Survey

Wages by Industry

Figure 35 illustrates the top ten sub-industries with the largest percentage of workers in the City of Brooks, Duchess, County of Newell, Strathmore, Medicine Hat and Alberta. Three of the 10 sub-industries fall into the mining, quarrying, and oil and gas extraction and the manufacturing industry.

FIGURE 35: TOP TEN SUB-INDUSTRIES BASED ON EMPLOYMENT INCOME, BASED ON THE CITY OF BROOKS, 2011

Industry (3- Digit NAICS)	Brooks		Duchess		Newell County No. 4		Strathmore		Medicine Hat		Alberta	
	With employment income	Median employment income	With employment income	Median employment income	With employment income	Median employment income	With employment income	Median employment income	With employment income	Median employment income	With employment income	Median employment income
311 Food manufacturing	17.34%	$ 40,530	4.20%	$ 24,827	2.84%	$ 41,574	0.58%	$ 59,482	0.54%	$ 37,567	0.82%	$ 38,436
213 Support activities for mining and oil and gas extraction	13.56%	$ 63,562	10.08	$ 76,135	8.51%	$ 59,713	3.76%	$ 70,945	5.44%	$ 64,462	2.91%	$ 65,890
611 Educational services	8.32%	$ 46,217	13.45%	$ 33,654	7.84%	$ 33,549	5.78%	$ 52,607	6.88%	$ 40,869	7.02%	$ 45,863
722 Food services and drinking places	5.69%	$ 15,794	0.00%	$ -	2.84%	$ 3,194	4.99%	$ 10,874	7.17%	$ 10,860	4.98%	$ 13,504
541 Professional, scientific and technical services	3.77%	$ 39,697	0.00%	$ -	5.14%	$ 40,939	5.86%	$ 45,431	5.71%	$ 38,525	7.64%	$ 51,600
211 Oil and gas extraction	3.45%	$ 106,081	0.00%	$ -	5.27%	$ 120,516	2.02%	$ 91,863	2.60%	$ 83,225	3.25%	$ 105,305
445 Food and beverage stores	2.82%	$ 20,483	0.00%	$ -	2.16%	$ 4,509	3.83%	$ 19,973	2.42%	$ 17,546	2.67%	$ 18,595
721 Accommodations services	2.75%	$ 11,514	0.00%	$ -	1.22%	$ 23,442	0.94%	$ 23,117	0.91%	$ 15,150	1.15%	$ 24,223
811 Repair and maintenance	2.69%	$ 60,091	0.00%	$ -	2.43%	$ 9,985	1.66%	$ 42,696	1.84%	$ 37,812	1.78%	$ 42,719
417 Machinery, equipment and supplies wholesaler-distributors	2.56%	$ 73,143	0.00%	$ -	1.89%	$ 59,815	2.17%	$ 41,166	0.59%	$ 64,059	1.63%	$ 58,765

Source- Statistics Canada, 2011 National Household Survey, Catalogue Number 99-014-X2011044.

In terms of the highest median incomes, the top five sub-industries (listed by NAICS Code) for Brooks were:

- 211 Oil and gas extraction ($106,081)
- 418 Miscellaneous wholesaler-distributors ($87,923)
- 417 Machinery, equipment and supplies wholesaler-distributors ($73,143)
- 486 Pipeline transportation ($68,647)
- 332 Fabricating metal product manufacturing ($66,968)

Labour Force by Occupation

In order to get a complete picture of the labour force capabilities for a particular area, it is necessary to examine the labour force by occupation, that is, by the core activities associated with an individual's employment. This provides a more detailed look at an individual's specialisation, which may not be evident in an industry-based analysis. For example, Brooks has a higher proportion of residents working in the sales and services (20.3%) and occupations in manufacturing and utility sectors (18.2%).

The education, law and social, community and government services (109.9%) and natural and applied sciences and related occupations (38.8%) saw the largest proportional increase between 2006 and 2011. These two occupations also had the largest actual number increase.

Occupations related to business finances and administration (11.70%) in Brooks experienced the largest decrease over the five-year period. Occupations that also declined included trades, transport and equipment operators and related occupations (11.6%); and natural resources, agricultural and related production occupations (11.7%). This may indicate that Brooks' trades workers may be leaving the community for work.

FIGURE 36: WORKFORCE BY OCCUPATION, 2006 AND 2011

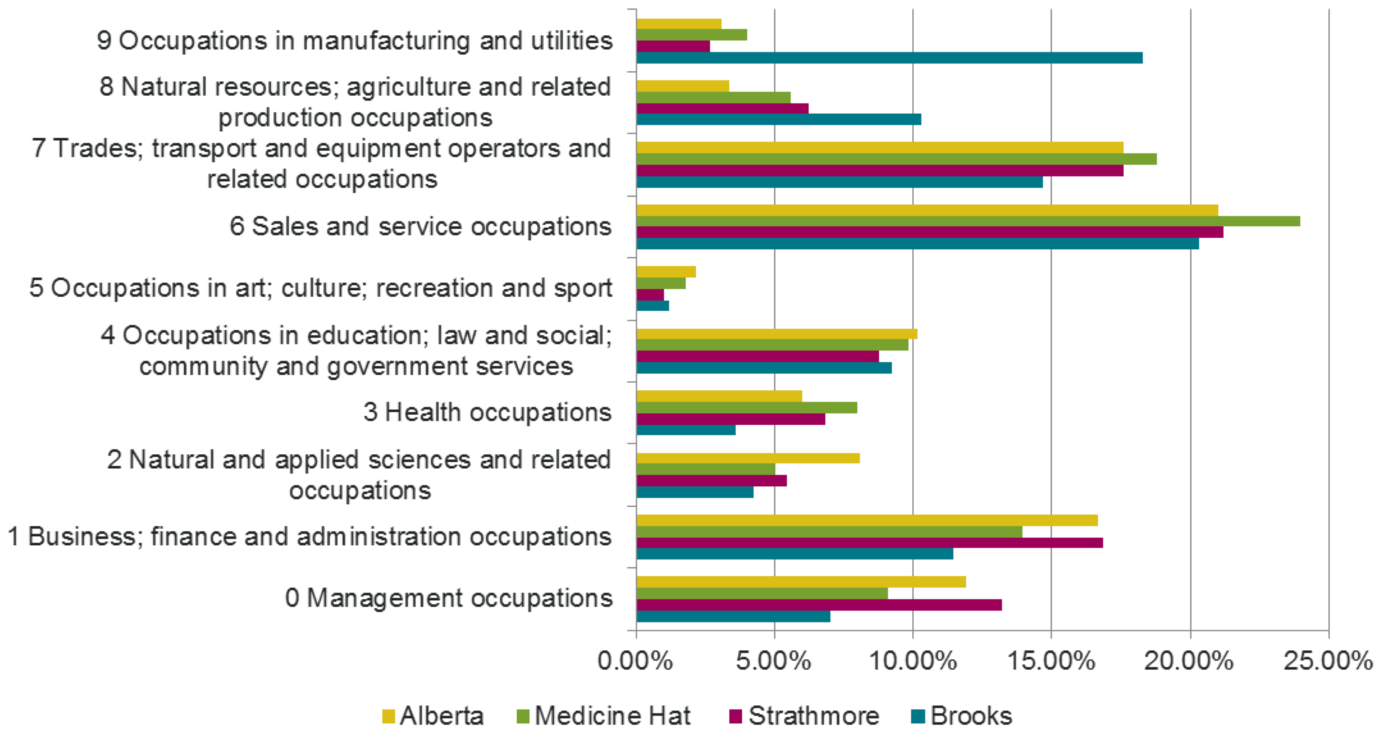
Occupation (NOC)	2006				2011				Brooks		Strathmore		Medicine Hat		Alberta	
	Brooks	Strathmore	Medicine Hat	Alberta	Brooks	Strathmore	Medicine Hat	Alberta	2006-2011 Change	% Change	2006-2011 Change	% Change	2006-2011 Change	% Change	2006-2011 Change	% Change
All occupations	7,790	5,815	32,155	1,928,635	8,050	6,885	32,290	2,088,150	260	3.34%	1,070	18.40%	135	0.42%	159,515	8.27%
0 Management occupations	565	635	2,745	187,240	565	910	2,935	248,520	-	0.00%	275	43.31%	190	6.92%	61,280	32.73%
1 Business; finance and administration occupations	1,055	1,025	4,585	340,430	920	1,160	4,500	347,880	-135	-12.80%	135	13.17%	-85	-1.85%	7,450	2.19%
2 Natural and applied sciences and related occupations	245	270	1,410	144,235	340	375	1,620	168,725	95	38.78%	105	38.89%	210	14.89%	24,490	16.98%
3 Health occupations	270	265	2,025	103,620	290	470	2,585	125,125	20	7.41%	205	77.36%	560	27.65%	21,505	20.75%
4 Occupations in education; law and social; community and government services	355	340	2,070	136,610	745	605	3,175	211,945	390	109.86%	265	77.94%	1105	53.38%	75,335	55.15%
5 Occupations in art; culture; recreation and sport	100	60	555	45,160	95	70	585	45,140	-5	-5.00%	10	16.67%	30	5.41%	-20	-0.04%
6 Sales and service occupations	1,525	1,375	8,350	438,105	1,635	1,460	7,735	438,865	110	7.21%	85	6.18%	-615	-7.37%	760	0.17%
7 Trades; transport and equipment operators and related occupations	1,335	1,210	6,680	350,360	1,180	1,210	6,065	367,650	-155	-11.61%	-	0.00%	-615	-9.21%	17,290	4.93%
8 Natural resources; agriculture and related production occupations	940	425	2,310	117,500	830	430	1,805	69,950	-110	-11.70%	5	1.18%	-505	-21.86%	-47,550	-40.47%
9 Occupations in manufacturing and utilities	1,390	210	1,425	65,365	1,470	185	1,290	64,345	80	5.76%	-25	-11.90%	-135	-9.47%	-1,020	-1.56%

Source: Statistics Canada, 2011 National Household Survey, 2006 Community Profile\

Figure 38 provides a snapshot of the 2011 occupation proportions. Brooks had a significantly higher proportion of its residents in occupations in manufacturing and utilities, over 14% greater proportion compared to Medicine Hat, which was the largest proportion in this occupation. This finding helps to confirm the conclusion in Figure 34 and Figure 34 which illustrate that mining, quarrying, and oil and gas extraction and the manufacturing industries play an important role in the City's economy. The natural resources, agriculture and related production occupations (10.3%) also had a higher percentage in Brooks compared to the others.

The lowest proportion of Brooks' residents is employed in occupations in arts, culture, recreation and sport (1.2%).

FIGURE 37: LABOUR FORCE BY OCCUPATION, 2011



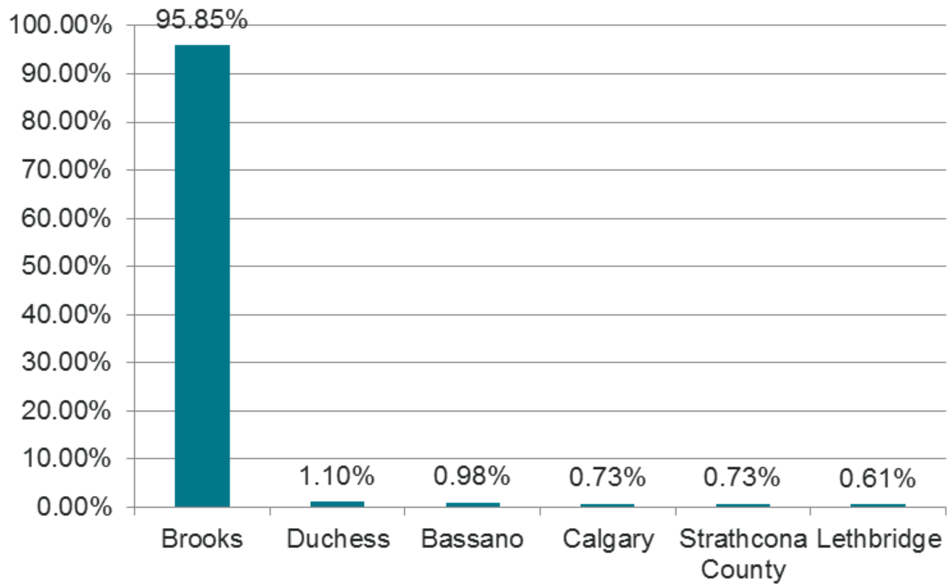
Source: Statistics Canada, 2011 National Household Survey, 2006 Community Profile

Labour Flow Characteristics

Commuting Patterns

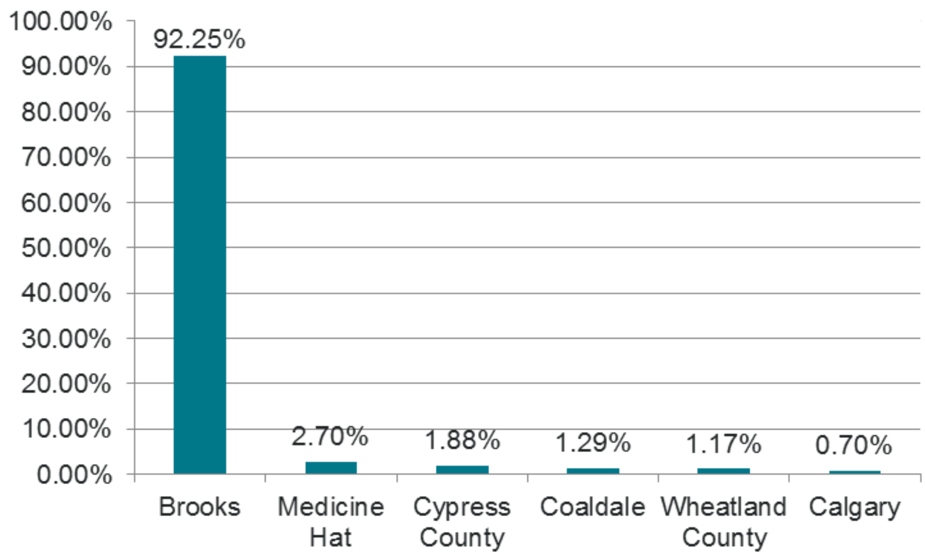
Figure 38 and Figure 39 illustrates the workforce that resides in Brooks and for the labour force that works within the City. Both Figures illustrate that Brooks does well in retaining residents to fill local jobs. This positions the City well for capturing a higher share of money spent by residents, reinvesting funds into the community. Figure 39 illustrates that the City has not been as successful in attracting residents from other communities to work within the municipality. This may lead to an inability for Brooks to introduce new money into the community.

FIGURE 38: TOP LOCATIONS RESIDENTS OF BROOKS COMMUTE TO FOR THEIR USUAL PLACE OF WORK, 2011



Source: Statistics Canada, 2011 National Household Survey, Catalogue Number 99-012-X2011032.

FIGURE 39: TOP LOCATIONS WORKERS IN BROOKS COMMUTE FROM FOR THEIR USUAL PLACE OF WORK, 2011



Source: Statistics Canada, 2011 National Household Survey, Catalogue Number 99-012-X2011032.

Mobility Status

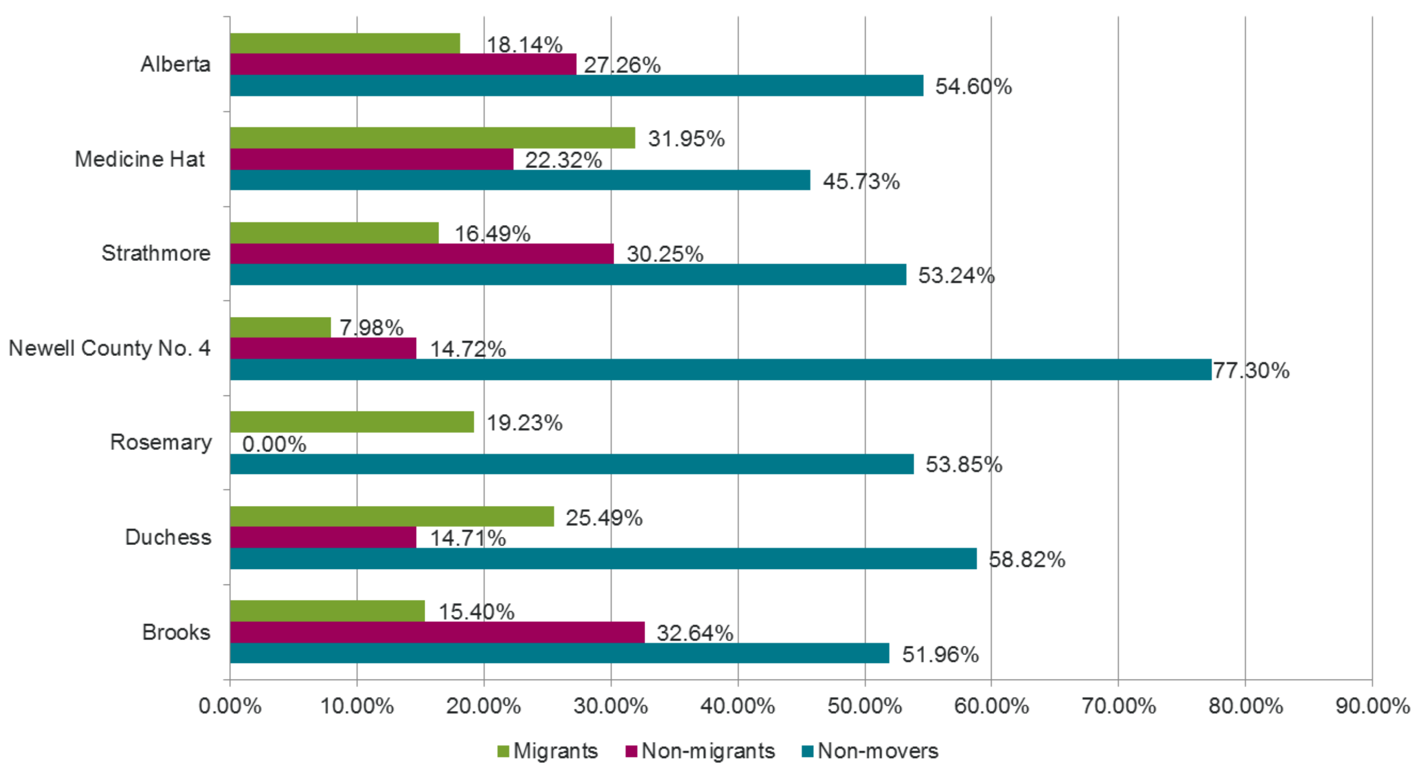
Mobility status was used to determine the level of newcomers Brooks was attracting compared to other areas in Alberta. Figure 40 shows the percentage of:

- non-movers - people who have not moved over the past few years;
- non-migrants - people that have moved but remained in the same municipality; and
- migrants - people who have moved to a different municipality within Canada.

The County of Newell has the largest percentage of residents classified as non-movers, 18% higher than the community of Duchess, the next highest level of non-mover population. Compared to the other areas, the County of Newell has the lowest number of migrant residents.

The figure also suggests that Brooks has been more effective than the broader County of Newell region in attracting migrants and non-migrants. Overall, Brooks has been the most successful at attracting non-migrants compared to the other areas examined. This suggests that the employment opportunities and quality of life assets in Brooks are greater than other similar sized communities. This conclusion supports the data in Figure 25, which shows that the majority of residents are under the age of 40 and are attracted by good employment prospects and child and youth-related services.

FIGURE 40: MOBILITY STATUS OVER THE LAST FIVE YEARS, 2011

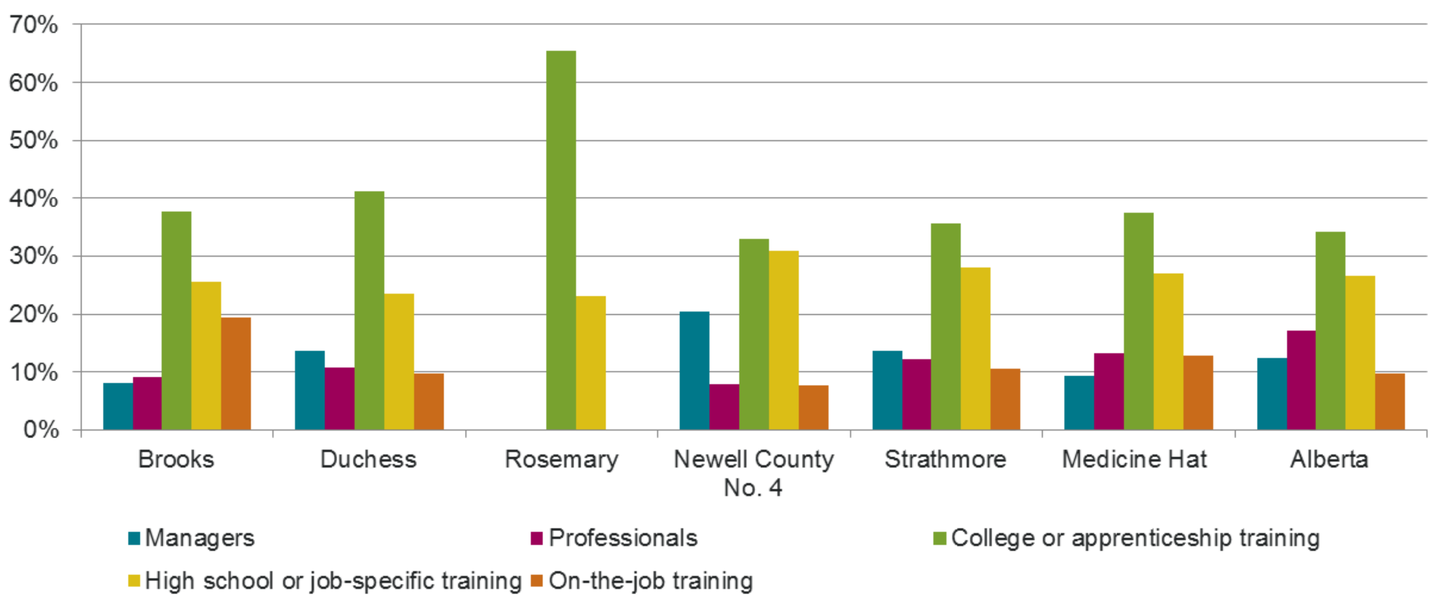


Source- Statistics Canada, 2011 National Household Survey, Catalogue Number 99-012-X2011054.

Occupation Characteristics

To understand the types of occupations categories and corresponding skill levels, Figure 42 highlights the characteristics of workers in Brooks compared to competitor communities. Overall, Rosemary has a higher proportion of residents with college or apprenticeship training and on the job training (65%). In examining the City of Brooks, the college or apprenticeship training and on the job training category represents the largest proportion of skill levels (38%).This confirms the finding from Figure 30, which illustrates that the City had a high proportion of residents with apprenticeship or trades certificate or diploma or a high school diploma or equivalent. The County of Newell has the highest proportion of residents with a high school or job-specific training (31%). This is not surprising based on the information seen in Figure 30.

FIGURE 41 OCCUPATION SKILL LEVEL, 2011



Source- Statistics Canada, 2011 National Household Survey, Catalogue Number 99-012-X2011054.

Business Patterns Assessment

Statistics Canada's Canadian Business Patterns data provides a record of business establishments by industry and size, collected from the Canada Revenue Agency. The data collected for the municipalities in the region includes all local businesses that meet at least one of the three criteria below:

- Have an employee workforce for which they submit payroll remittances to CRA; or
- Have a minimum of $30,000 in annual sales revenue; or
- Are incorporated under a federal or provincial act and have filed a federal corporate income tax form within the past three years.

The Canadian Business Patterns Data records business counts by "Total", "Indeterminate" (Ind.) and "Subtotal" categories. The establishments in the "Indeterminate" category include the self-employed (i.e. those who do not maintain an employee payroll but may have a workforce consisting of contracted workers, family members or business owners). It should be noted that the Canadian Business Patterns Data uses the CRA as a primary resource in establishing counts; therefore, businesses without a business number or indicating annual sales less than $30,000 are not included. The population of these small, unincorporated businesses is thought to be in the range of 600,000 in all of Canada

The business patterns data from the previous two years (2014 and 2015) suggest that Brooks has had an overall increase in self-employed businesses (11 businesses) but a decrease in businesses with employees (28 businesses). The number of businesses with between 10 and 19 employees was the only size of business that experienced an increase between 2014 and 2015. This suggests that some of the businesses with five to nine employees may have increased in size and the businesses with 20 to 49 employees may have downsized.

FIGURE 42: BROOKS TOTAL BUSINESS COUNT AND EMPLOYEE SIZE, 2014 AND 2015

Industry (NAICS)	Total	Ind.	Subtotal	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
December 2014	2,191	1,317	874	443	193	111	83	27	12	3	2
December 2015	2,174	1,328	846	440	163	120	77	28	13	3	2

Source- Canadian Business Patterns, December 2014 and December 2015

Figure 43 provides a snapshot of the business counts and business sizes in the City of Brooks in 2015. The table includes only businesses that are classified. Self-employed businesses make up 60.1% of all businesses in Brooks. In examining the businesses with employees, 51.2% have less than five employees and only 2.2% have over 100 employees. This indicates that Brooks' economy is supported by small- and medium-sized businesses.

The real estate and rental and leasing industry made up the largest proportion of self-employed businesses, followed by agriculture, forestry, fishing and hunting (18%), construction (8%) and the professional, scientific, and technical services (8%) industries. For businesses with employees, the mining, and oil and gas extraction (13%) industry made up the largest proportion of businesses, followed by other services (12%) and retail trade (10%).

FIGURE 43: BROOKS BUSINESSES BY LOCATION AND SIZE, 2015

Industry (NAICS)	Total	Ind.	Subtotal	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
Total	2022	1215	807	413	155	117	76	28	13	3	2
11 - Agriculture, forestry, fishing and hunting	248	213	35	22	8	3	1	1	0	0	0
21 - Mining and oil and gas extraction	178	71	107	55	16	13	10	7	5	1	0
22 - Utilities	6	2	4	2	0	1	1	0	0	0	0
23 - Construction	175	101	74	40	14	8	8	1	2	1	0
31-33 - Manufacturing	30	9	21	9	5	3	3	0	0	0	1
41 - Wholesale trade	69	15	54	16	16	16	5	1	0	0	0
44-45 - Retail trade	124	45	79	30	24	14	8	2	1	0	0
48-49 - Transportation and warehousing	108	61	47	24	6	8	6	2	1	0	0
51 - Information and cultural industries	7	0	7	1	1	3	2	0	0	0	0
52 - Finance and insurance	85	66	19	7	1	3	5	2	0	1	0
53 - Real estate and rental and leasing	330	295	35	19	11	4	1	0	0	0	0
54 - Professional, scientific and technical services	172	95	77	62	4	8	2	1	0	0	0
55 - Management of companies and enterprises	64	60	4	3	0	1	0	0	0	0	0
56 - Administrative and support, waste management and remediation services	88	44	44	24	11	3	5	1	0	0	0
61 - Educational services	16	7	9	3	2	1	1	1	0	0	1
62 - Health care and social assistance	73	30	43	26	7	4	0	4	2	0	0
71 - Arts, entertainment and recreation	18	10	8	4	3	0	0	1	0	0	0
72 - Accommodation and food services	61	19	42	12	4	12	11	3	0	0	0
81 - Other services (except public administration)	167	72	95	54	22	11	7	1	0	0	0
91 - Public administration	3	0	3	0	0	1	0	0	2	0	0

Source- Canadian Business Patterns, December 2015

Figure 44 highlights the proportion of total classified businesses in the County of Newell, Brooks and comparator communities. Agriculture, forestry, fishing, and hunting industry businesses make up the largest proportion of businesses in County of Newell, accounting for 37.36% of all businesses. The construction (10.99%) related businesses make up the second largest proportion of businesses.

While Brooks has a significant proportion of its businesses in the mining and oil and gas extraction industry (13.26%), Bassano has a slightly higher proportion of businesses (13.86%). This suggests that Brooks may have to compete with its neighbouring community for businesses. However, this also suggests that there is a greater supply chain in the region, helping to attract related businesses to the area.

Brooks has the highest proportion of businesses in the other services industry (11.77%), wholesale trade (6.69%), and education services (1.12%) compared to the other areas. These industries are supported by Brooks' central location between Calgary, Lethbridge, and Medicine Hat.

FIGURE 44: CLASSIFIED BUSINESSES WITH EMPLOYEES, 2015

Industry (NAICS)	Brooks	Bassanno	Duchess	Newell County No. 4	Lethbridge	Strathmore	Medicine Hat	Alberta
Total (classified)	807	101	78	182	3,609	549	2,532	169,305
11 - Agriculture, forestry, fishing and hunting	35	16	18	68	77	42	65	5,891
21 - Mining and oil and gas extraction	107	14	14	10	27	18	122	6,111
22 - Utilities	4	1	-	1	2	2	4	329
23 - Construction	74	9	9	20	482	96	296	24,074
31-33 - Manufacturing	21	5	1	7	141	13	60	5,272
41 - Wholesale trade	54	4	-	4	204	16	95	7,624
44-45 - Retail trade	79	9	4	5	550	59	368	17,388
48-49 - Transportation and warehousing	47	3	7	8	152	33	99	9,938
51 - Information and cultural industries	7	1	1	1	27	2	17	1,393
52 - Finance and insurance	19	4	-	4	161	4	102	5,414
53 - Real estate and rental and leasing	35	2	1	3	168	22	108	7,385
54 - Professional, scientific and technical services	77	7	6	14	392	80	345	26,100
55 - Management of companies and enterprises	4	-	-	-	49	4	15	1,896
56 - Administrative and support, waste management and remediation services	44	2	4	5	145	34	104	7,985
61 - Educational services	9	-	-	1	40	2	23	1,777
62 - Health care and social assistance	43	5	1	6	389	24	237	12,729
71 - Arts, entertainment and recreation	8	1	-	2	45	7	28	1,722
72 - Accommodation and food services	42	6	1	3	227	30	153	9,599
81 - Other services (except public administration)	95	11	10	19	324	59	286	15,932
91 - Public administration	3	1	1	1	7	2	5	746

Source- Canadian Business Patterns, December 2015

Location Quotient Analysis

A location quotient analysis provides a deeper dive into the business concentrations for the region and some competitors.[29] The data provides a snapshot of the businesses with employees, as they are the local economic drivers, in comparison to the self-employed businesses. This is also true for Figure 46.

Figure 46 shows the category of agriculture, forestry, fishing and hunting industry has the highest concentration in the County of Newell (6.22). This is the highest concentration of this sector compared to the other communities examined. The County of Newell also has a high concentration of businesses in the mining and oil and gas extraction industry (1.83).

The business pattern data illustrates that Brooks has a higher concentration in the mining and oil and gas extraction industry and the wholesale trade industry compared to the other areas examined. The high concentration of businesses in the mining and oil and gas extraction industry supports the findings in Figure 34 of a high labour force concentration in the same industry. This finding coupled with the data in Figure 38 and

[29] Local concentration by location quotient (LQ). An LQ measures the concentration of business activity in a local area (e.g. Brooks) relative to an over-arching area (e.g. Alberta). An LQ of over 1.25 suggests a local relative concentration of activity. In theory, this suggests the local sector is exceeding local demand, and exporting products/services to areas outside of the local community. A sector LQ of less than 0.75 suggests a gap area, where activity is under-performing relative to overall provincial distributions.

Figure 39 suggests that the City has been able to support the oil and gas sector by retaining its own labour force.

Figure 45 also illustrates that Brooks has a low concentration of businesses in the professional, scientific and technical services, health care and social assistance, and construction industries. However, the City does have a higher concentration of businesses in these sectors compared to Bassano or the County of Newell, indicating that Brooks has been able to attract businesses compared to other communities in the County.

Trends in Brooks

Figure 45 provides an overview of the business patterns data for the classified industries for businesses with employees between 2008 and 2013 for the City of Brooks. This figure helps to provide a better understanding of the growth or decline of businesses over the five-year period. As stated previously, the Canadian Business Patterns (CBP) data set is not collected equally for each municipality, leading to either suppression of data or faulty data. This is the case with the CPB data for 2008-2013 for the County of Newell as well as the communities of Bassano, Duchess, and Rosemary. As Brooks is the largest urban area in the County, historic CBP data is available.

Between 2008 and 2013, the total number of businesses with employees in the City grew by 84.22%. The largest four sectors in both 2008 and 2013 are the mining and oil and gas extraction, the retail trade, professional, scientific and technical services (PST), as well as the other services (except public administration) industries. While the manufacturing sector experienced the largest increase over the 5-year period (375%), it only grew by 15 businesses. The other services sector experienced the largest increase in the total number of businesses with employees (65 businesses) followed by the mining and oil and gas extraction industry (55 businesses).

FIGURE 45: NUMBER OF BUSINESS ESTABLISHMENTS WITH EMPLOYEES BY SECTOR, 2008-2013

Industry (NAICS)	2008	2013	2008-2013 Change	% Change
Total	469	864	395	84.22%
11 - Agriculture, forestry, fishing and hunting	8	36	28	350.00%
21 - Mining and oil and gas extraction	59	114	55	93.22%
22 - Utilities	0	3	3	300.00%
23 - Construction	44	71	27	61.36%
31-33 - Manufacturing	4	19	15	375.00%
41 - Wholesale trade	20	50	30	150.00%
44-45 - Retail trade	55	104	49	89.09%
48-49 - Transportation and warehousing	29	47	18	62.07%
51 - Information and cultural industries	4	7	3	75.00%
52 - Finance and insurance	17	22	5	29.41%
53 - Real estate and rental and leasing	23	37	14	60.87%
54 - Professional, scientific and technical services	66	82	16	24.24%
55 - Management of companies and	2	7	5	250.00%
56 - Administrative and support, waste management and remediation services	29	44	15	51.72%
61 - Educational services	4	9	5	125.00%
62 - Health care and social assistance	28	41	13	46.43%
71 - Arts, entertainment and recreation	4	10	6	150.00%
72 - Accommodation and food services	17	44	27	158.82%
81 - Other services (except public administration)	49	114	65	132.65%
91 - Public administration	0	3	3	300.00%

Source- Canadian Business Patterns, December 2008, December 2013

Figure 46 illustrates industry concentrations for businesses with employees between 2008 and 2013. The mining and oil and gas extraction industry has the highest concentration of businesses in both 2008 and 2013. This trend continues into 2015, as shown in Figure 46. While the utilities and public administration sectors experienced the largest growth in terms of industry concentration, Figure 45 shows that these sectors grew from zero to three businesses. Despite the high growth of the manufacturing sector between 2008 and 2013, the sector still had a low concentration compared to the province.

FIGURE 46: CONCENTRATION OF INDUSTRIES, 2008-2013

Industry (NAICS)	2008	2013
11 - Agriculture, forestry, fishing and hunting	0.46	1.07
21 - Mining and oil and gas extraction	3.04	3.58
22 - Utilities	0.00	1.78
23 - Construction	0.72	0.61
31-33 - Manufacturing	0.25	0.69
41 - Wholesale trade	0.82	1.25
44-45 - Retail trade	1.10	1.15
48-49 - Transportation and warehousing	1.19	0.98
51 - Information and cultural industries	1.04	0.97
52 - Finance and insurance	1.10	0.79
53 - Real estate and rental and leasing	1.29	0.94
54 - Professional, scientific and technical services	0.96	0.61
55 - Management of companies and	0.28	0.64
56 - Administrative and support, waste management and remediation services	1.37	1.11
61 - Educational services	0.88	1.02
62 - Health care and social assistance	0.90	0.65
71 - Arts, entertainment and recreation	0.76	1.17
72 - Accommodation and food services	0.71	0.92
81 - Other services (except public administration)	1.18	1.35
91 - Public administration	0.00	0.81

Source- Canadian Business Patterns, December 2008, December 2013

Appendix C: Investment Readiness Toolkit

At the heart of investment, readiness is a desire to make a community inviting to investment and maximize its ability to leverage competitive strengths in bringing new investment into the local economy.

Investment attraction can provide benefits such as opportunities to attract new industries or expand local niche industry representation, attract and implement advanced technologies, develop new products, enhance local workforce talent through additional skills, and much more.[30] Any new investment and development within a community will have spillover effects in several areas and can set the stage for fostering further growth and enhancement. Investment and development attraction can lead to:

- **Increased economic opportunities**
- **Increased opportunities for growth**
- **Enhanced the job market options**
- **Increased competitive advantages**
- **Diversified and sustainable community**

New investment and development within a community are essential to securing sustainable and future growth. This highlights the importance of communities becoming "investment ready" and having the right personnel in place to facilitate the needs of potential investors.[31] There are many ways in which a community can increase its investment readiness, but what is important is that communities move towards becoming proactive on investment attraction rather than reactive. Toolkits exist to help communities assess and improve their investment readiness in this regard.

Investment Readiness Toolkits

A variety of toolkits is geared toward investment readiness. In Alberta and British Columbia, similar toolkits are advocated by their respective provincial governments. In addition, Ontario's Ministry of Northern Development and Mines has developed an investment readiness toolkit for the purposes of helping especially isolated or rural communities.

Central to all toolkits noted above is an *investment readiness checklist*, which serves as a form of appraisal of existing investment readiness. Completion of such a checklist allows for identification of gaps or shortcomings in investment readiness. For British

[30] Alberta Investment Readiness Toolkit, 2012
[31] Alberta Investment Readiness Toolkit, 2012

Columbia, the toolkit is predominantly reliant on the checklist itself as the primary component of the toolkit[32]; however, in the case of Alberta's Investment Readiness Toolkit[33] (AIRT) and Ontario's Investment Readiness Test[34], detailed supporting components are also included.

In many ways, the Alberta model is superior to the Ontario model because the document provides a means of addressing key aspects of the checklist in very specific detail, as well as additional considerations once the checklist is completed.

Key ideas, thoughts and concepts are highlighted and best practices are included to provide municipalities with information on how they can more successfully attract investment. It also provides resources such as templates and additional checklists for communities to adapt to their own specific needs. By doing so, the AIRT provides a methodology for approaching key aspects of checklist so that communities can understand how each aspect can be addressed and the tasks involved in going about the process.

For example, the AIRT checklist has an item related to whether a community has a community profile or not. Later in the document a section explains the key components of a community profile and how to conduct some of the analyses that will add value to the community profile, such as location quotient and shift-share calculations, which help determine economic drivers and competitive sectors.

By contrast, though the Ontario model also has additional information to help communities, it is not nearly as detailed as the AIRT toolkit. Instead, for each of the categories covered in the checklist, of which there are seven, a series of "tips" is provided. There is much less methodological guidance about going about conducting the improvements themselves.

The AIRT also has the benefit of addressing the following additional considerations, which are important once the self-assessment test is completed:

- **Developing an investment strategy and marketing plan**: developing a roadmap for bringing investment readiness forward and prioritizing improvements, as well as identifying means of engagement and outreach in investment attraction activities
- **Dealing with investment generation**: developing and implementing protocols and initiating activities associated with lead generation, engagement and follow-up
- **Conducting familiarization tours**: developing a solid methodology for bringing potential investors to the community and associated activities and follow-up

The above notions are not discussed in the Ontario toolkit, leaving the potential for users to wonder what they should do once completing the checklist.

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[32] British Columbia Investment Readiness Assessment Checklist – Business Attraction Toolkit for B.C. Communities, n/d

[33] Alberta Investment Readiness Toolkit, 2012

[34] Ontario Investment Readiness Test, n/d

Investment Readiness Checklists – Understanding their Key Components

As noted above, investment readiness toolkits are important for determining the extent to which a community is investment ready. Alberta and British Columbia's checklists are nearly identical; despite each indicating that they were developed in partnership between provincial economic development associations, and provincial and federal governments. The Ontario Investment Readiness Test is slightly different in the ordering, categorization and kinds of questions it asks about, as well as the scoring methodology used to evaluate investment readiness.

Using the Alberta Checklist, the following components of the investment readiness are evaluated by the framework:

Part I – Expertise

- **Contacts** – Ensuring the right people are in the right places to respond to and deal with investment attraction opportunities and have the appropriate level of knowledge
- **Land Use Planning** – Ensuring clear and concise information, guidance, and resources are available pertaining to land use planning and zoning matters, including permitting and approval processes
- **Liaising with Existing Businesses** –Ensuring a strong and healthy rapport and engaged and empowered business community is thriving locally
- **Information Sources** – Ensuring easy tracking of information requests such as those relating to utilities, technical specifications, and provincial and federal policies, programs, information or issues/trends

Part II – Resources

- **Industrial Land Inventory** – Ensuring the tracking, collecting and presentation of land availability is accessible to potential investors and easily navigated
- **Joint Ventures** – Ensuring appropriate partnerships with business groups and regional collaborations are present and healthy
- **Economic Development Capacity** – Ensuring capacity for economic development activities and guidance is maximized

Part III – Communications

- **Community and Site Selection Profile** – Ensuring a clear and detailed series of community and site selection profiles are available and up to date
- **Website** – Ensuring the online presence of the community is maximized for the purposes of investment attraction
- **Other Communications Considerations** – Ensuring the municipality has up-to-date mapping to be included in promotional documents and maintains a healthy relationship with media representatives

Using the Ontario Checklist, the following components of investment readiness are evaluated:

- **Section A – Community Profile –** A detailed checklist of all components typically included in a community profile and practices associated with its upkeep
- **Section B – Industrial and Commercial Land Inventory –** A series of questions associated with land availability, it's monitoring, its presentation, its accessibility and partnerships associated with it (i.e. private sector input in addition to public lands)
- **Section C – Investment Marketing –** A series of questions about activities and methods of investment attraction marketing, including media communications
- **Section D – Land Use Planning –** A series of question-related to land use planning, zoning, and permits and approvals processes
- **Section E – Economic Development –** A series of questions about economic development strategic planning, capacity, and strategic partnerships
- **Section F – Dealing with Site Selectors –** A series of questions related to preparation for and dealing with site selectors
- **Section G – Monitoring Investment Inquiries –** Two questions specifically addressing failure to meet the needs of potential investors and monitoring/improving missed opportunities

Critiquing the Drawbacks and Benefits

Both checklists outlined above have their own strengths and shortcomings, especially when they are compared to each other.

For example, the Ontario Checklist's section on economic development has several more questions than that of the Alberta Checklist. In addition, the scope of its land inventory category is broader in that it also includes commercial properties.

On the other hand, the Ontario Checklist falls short in regard to succinctly addressing communications in its various forms, with much of its questions peppered throughout the questionnaire, rather than in one or more specific sections or sub-sections. The Alberta one is more clearly delineated in that regard. A specific section of questions also deals in relationship cultivation and engagement of existing businesses in the community. The Ontario checklist does not even address these issues, which have the potential to negatively impact attraction if left un-attended.

Finally, an additional strength of the Ontario checklist is that rather than treating responses simply as "yes" or "no", it also includes an option for "needs improvement", which is helpful in identifying proverbial low-hanging fruit.

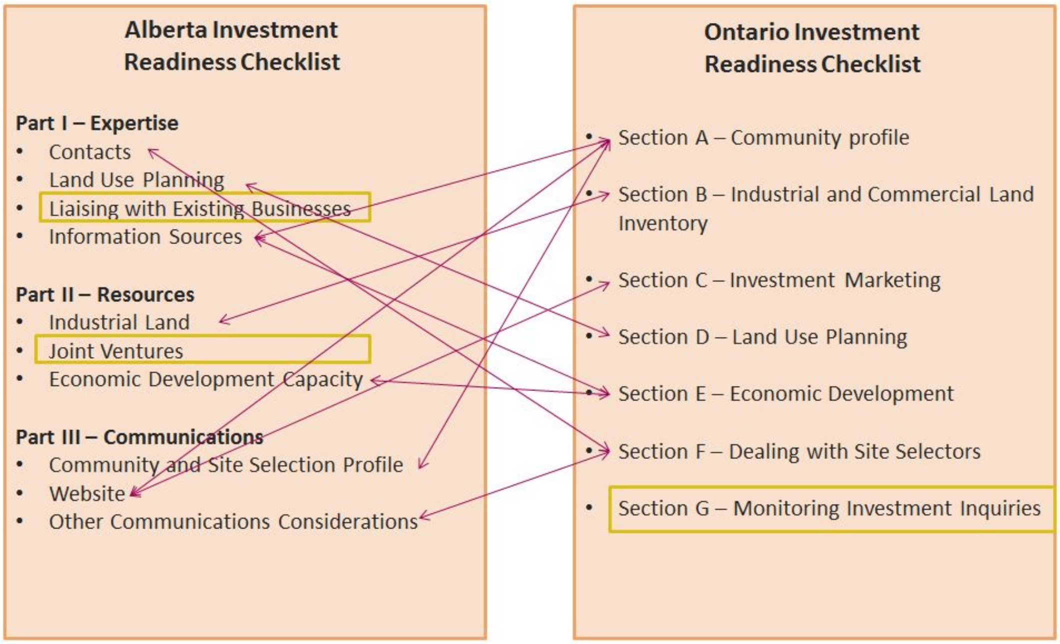
Given that the two checklists both contain positive and negative components and given that a strong checklist forms the basis of any investment attraction toolkit, it makes sense to integrate the strongest aspects of each checklist.

Building a New Investment Readiness Checklist Framework

Building on the strengths identified in both the Ontario and Alberta checklists, an amalgamated checklist has been developed as a potential framework for Brooks and its neighbouring communities. It uses the Alberta model as a base and builds-in aspects of the Ontario checklist where appropriate.

The figure below demonstrates areas of similarity and difference between the two checklist frameworks. Notably, yellow boxes are used to isolate areas of unique contribution in either of the frameworks. In other words, they are unique areas of inquiry not covered in the other list.

FIGURE 47: INVESTMENT READINESS CHECKLIST COMPARISONS FOR ALBERTA AND ONTARIO FRAMEWORKS.



Source: Adapted from Alberta Investment Readiness Toolkit, 2012, and Ontario Investment Readiness Test, n/d.

Note: the yellow boxes around certain items represent unique components found in either framework. Arrows are provided to indicate where predominant overlaps and similarities exist.

The series of related tables below represent the newly developed checklist, as updated to reflect components of both the Alberta and Ontario frameworks. In each table has a header that outlines the category (e.g. industrial and commercial land inventory), under which the questions for each are asked. Next to each question is a “yes”, “NI” (needs improvement), and “no” box that can be ticked accordingly. At the end of the series of tables is a scorecard, where the tallies from each section for yes, NI, and no are combined for a final score. For every “yes” a score of 2 is provided, while for every “NI” a score of 1 is provided. No points are awarded for “no”. An answer has to be provided for each question even if the answer is no, and wherever there are sub-questions they must also each be answered.

The highest possible score is 192, if “yes” is marked for all questions. Otherwise, the score breakdown is as follows:

- Greater than 163 = The municipality is very investment ready and well positioned (85% or greater)
- Between 96 and 162 = The municipality is investment ready but there is room for improvement (between 50% and 84%)

- Between 67 and 95 = Your municipality is close to being investment ready but requires some additional work and changes to be made (35% to 49%)
- Below 66 = There are lots of opportunities for your municipality to ensure its investment readiness (below 35%)

FIGURE 48: INVESTMENT READINESS CHECKLIST: CONTACTS

Contacts	Brooks			Newell County		
	Yes	NI	No	Yes	NI	No
1. Does your community have a person designated as the key or main contact on economic development?	1			1		
2. If the contact person is an economic development professional, is that person familiar with the land use planning, development approvals, and building permit process in your community?		1			1	
3. Does he/she have an up-to-date copy of the local official plan and zoning by-law and know council's policies on new development proposals?	1				1	
4. Does this person have an understanding of the site selection response protocol (e.g. responding to inquiries, data collection, site visit, etc)?		1			1	
5. Does your municipality have a person designated as the key contact on land use planning and development matters in your community?	1				1	
Total	6	2	0	2	4	0

Source: MDB Insight, 2017.

FIGURE 49: INVESTMENT READINESS CHECKLIST: LAND USE PLANNING

Land Use Planning	Brooks			Newell County		
	Yes	NI	No	Yes	NI	No
1. Does the local official plan have one general designation for each of the basic land use categories such as residential, commercial, industrial, institutional, open space, rural and environmentally sensitive?		1		1		
2. Does your official plan make specific mention of a strategy for economic development?	1			1		
3. Does your municipality list the policy intention, regulations and permitted uses in each land use designation?	1			1		
4. Does your municipality have an effective information system that you use to provide official plan and zoning information to prospective investors/developers (e.g. air photos, series of neighbourhood charts, or wall maps)?	1			1		
5. In your experience, are the policies and/or designations in the local official plan general enough so an official plan amendment is not required to accommodate most development proposals in your community?		1			1	
6. Is your zoning by-law flexible enough to allow desired development in your community?						
7. Is the establishment of new "home occupations" allowed in most areas of the community, without the need for an official plan amendment and/or zoning by-law change?	1			1		
8. Where they are allowed, are a wide range of businesses permitted, as well as outdoor signage/advertising and on-site customer parking?	1			1		
9. Is your key municipal contact person knowledgeable about the upper-tier official plan as well as neighbouring municipalities' plans, and how these policies and land use designations may affect proposed development in your community?		1			1	
10. Are your community's official plan and zoning by-laws kept up to date (e.g. updated every five years)?			1	1		
11. Is economic development addressed in the official plan's policies?	1			1		
12. Does your municipality have a flow chart outlining the steps in the land use planning and development approvals process in your community?			1			1
13. In cases where planning and development approvals are not handled locally, do you know which level of government has the responsibility? (e.g. upper-tier, province) and who your contact is?		1			1	
14. Does your municipality have information on how long it takes for a typical planning application/proposal in your community to be approved?			1			1
15. Do you have a list of all the application fees and other associated charges and imposts or levies that an applicant/developer would be required to pay in connection with processing a planning/development proposal in your community?	1				1	
16. Does your municipal planning staff discuss/coordinate their work with economic development staff?	1			1		
18. Does your municipality have a designated individual to guide the proponent through the approvals process?		1			1	
19. When a development application has been successfully completed, is there a review of the process with the proponent as part of your customer services program?		1				1
20. Are you aware of the environmental regulations that may affect investors considering your community?	1			1		
Total	18	6	3	20	5	3

Source: MDB Insight, 2017.

FIGURE 50: INVESTMENT READINESS CHECKLIST: LIAISING WITH BUSINESSES

Liaising With Existing Businesses In Your Community	Brooks			Newell		
	Yes	NI	No	Yes	NI	No
1. Does any senior member of your organization monitor/evaluate your community's tack record on liaising w ith existing investors?			1			1
2. Do your Mayor, CAO, Economic Development Officer or planning staff meet w ith local business people, including the Chamber of Commerce on a regular basis to talk about business needs and future plans (e.g. once every six months for a breakfast meeting)?	1			1		
3. Does your municipality liaise w ith the local Chamber of Commerce about economic development issues?	1			1		
4. Does your community have an active Business Retention and Expansion Program?		1			1	
Total	4	1	1	4	1	1

Source: MDB Insight, 2017.

FIGURE 51: INVESTMENT READINESS CHECKLIST: INFORMATION SOURCES

Information Sources	Brooks			Newell		
	Yes	NI	No	Yes	NI	No
1. Can you reach utilities representatives in your area w ith a single phone call to answ er technical or pricing questions?			1			1
2. Do you communicate w ith provincial/federal agencies to learn about new policies, programs, information or issues/trends?	1			1		
Total	2	0	1	2	0	1

Source: MDB Insight, 2017.

FIGURE 52: INVESTMENT READINESS CHECKLIST: INDUSTRIAL AND COMMERCIAL LAND INVENTORY

Industrial and Commercial Land Inventory	Brooks			Newell		
	Yes	NI	No	Yes	NI	No
1. Does your municipality have an industrial and commercial land inventory?	1			1		
2. Is the information up-dated regularly (quarterly)?	1			1		
3. Does the inventory provide potential investors/developers w ith relevant economic development information such as availability and cost of industrial properties, site servicing, transportation access, ow nership, location, size, etc?	1			1		
4. Does the inventory include both publicly and privately ow ned land?	1			1		
5. Does the inventory provide the follow ing site information for each property (grade each separately):						
1) Allow able uses		1			1	
2) Lease/purchase price	1			1		
3) Location	1			1		
4) Size, indicating minimum and maximum land available	1			1		
5) Taxes			1			1
6) Utilities providers and capacity			1			1
7) Information on site contamination			1			1
8) Telecommunications providers and related information (e.g. availability of fibre optics and digital sw itching)			1			1
9) Transportation netw ork access			1			1
10) Ow ner/contact person	1			1		
11) Contact names for community's planning and building officials	1			1		
6. If you have a w ebsite, is the inventory posted?	1			1		
7. Is your land inventory connected to your community GIS system?	1			1		
8. Does your community w ork closely w ith the Commercial Real Estate Agencies in your area to make sure that you are aw are of w hat is available?		1			1	
Total	22	2	5	22	2	5

Source: MDB Insight, 2017.

FIGURE 53: INVESTMENT READINESS CHECKLIST: JOINT VENTURES

Joint Ventures	Brooks			Newell		
	Yes	NI	No	Yes	NI	No
1. Do you partner with independent business groups, the local Chamber of Commerce, or tourism board to jointly market your community as a business location or tourist destination?	1			1		
2. Is your municipality pooling resources with neighbouring communities to jointly fund a competitiveness study or economic development strategy? The payoff can be surprisingly extensive. In addition to the facts and figures generated by the study, this sends a positive message to the business community contacted as part of the study that your municipality is proactive	1			1		
Total	4	0	0	4	0	0

Source: MDB Insight, 2017.

FIGURE 54: INVESTMENT READINESS CHECKLIST: ECONOMIC DEVELOPMENT CAPACITY

Economic Development Capacity	Brooks			Newell		
	Yes	NI	No	Yes	NI	No
1. Does your community have a formal strategic plan for economic development?			1			1
▪ If yes, has it been updated in the past three years?						
2. Has your community established an economic development committee?	1			1		
3. Does your municipality employ full or part-time professional planners and/or economic development staff to deal specifically economic development and land use planning matters?	1			1		
4. Is there a budget for economic development activity in your municipality?	1			1		
5. Does your municipality use private sector economic development or land use planning consultants?		1			1	
6. Does your community maintain a list of key contacts in both the private and public sectors who can provide advisory and technical assistance in key areas (e.g. forestry mining, real estate, telecommunications, trade agreement, taxes, etc.)?			1			1
7. Does your community have an office/staff to create a one-window development process?			1			1
8. Does your community maintain a list of local business leaders to whom site selectors can be confidentially referred for testimonials about the community?	1			1		
Total	8	1	3	8	1	3

Source: MDB Insight, 2017.

FIGURE 55: INVESTMENT READINESS CHECKLIST: COMMUNITY AND SITE SELECTION PROFILES

Community and Site Selection Profile	Brooks			Newell		
	Yes	NI	No	Yes	NI	No
1. Does your municipality have a community profile?	1			1		
2. Is it updated on a regular basis (e.g. at least every 6 months)?			1			1
3. Does the community profile include the following elements **(add one point for each)**:						
a. your community's vision statement			1			1
b. the name, address, phone number and email address of a local economic development professional who can be contacted by potential investors	1			1		
c. a demographic profile by gender and age		1			1	
d. list of education institutions and training facilities	1			1		
e. a labour force profile, including a summary of wage rates by occupation type			1			1
f. occupation and specific skills such as bilingual capacity	na	na	na	na	na	na
g. education attainment levels			1			1
h. a list of major private and public sector employers			1			1
i. a summary of the local industrial, commercial and residential real estate markets, including the cost of building permits per square foot			1			1
j. information or contacts regarding the local, provincial and federal tax systems		1			1	
k. a list of local industrial parks, including information on cost per hectare/acre and available services	1			1		
l. a summary of local industrial realty taxes, sewage and water	1			1		
m. capacities, waste disposal facilities, gas and electrical rates			1			1
n. a summary of police and fire protection services	1			1		
o. a list of local financial institutions			1			1
p. an inventory of existing businesses in your community along with number of employees			1			1
q. list of leading industries and their growth rates		1			1	
r. information on local and regional transportation networks (e.g. airports, highways, railways, intermodal, ports, etc.)	1			1		
s. an overview of telecommunications services and infrastructure			1			1
t. a chart indicating distances to major urban markets and border crossings in both kilometres and miles	1			1		
u. a list of local business groups	1			1		
v. a summary of local research and development initiatives	1			1		
w. growth projections related to upgrading existing infrastructure and existing capacity		1			1	
x. testimonials from local businesses			1			1
y. cost of living data	1			1		
z. a list of local and regional health care facilities	1			1		
aa. an overview of quality of life amenities	1			1		
4. Does your community maintain a profile using the North American Site Selection Standards Template?			1			1
5. Are you aware of investment going elsewhere as a result of your community's failure to meet the needs of the investor?		1			1	
6. Does your community monitor investment attraction (e.g. track missed opportunities) and work to improve the way in which it deals with potential investors?			1			1
Total	26	5	13	26	5	13

Source: MDB Insight, 2017.

FIGURE 56: INVESTMENT READINESS CHECKLIST: WEBSITES

Website	Brooks			Newell		
	Yes	NI	No	Yes	NI	No
1. Does your community have a standalone economic development website (not connected to the main community website)?		1			1	
2. Does your website contain an easily downloadable copy of your community profile?			1			1
3. Does your website contain information done to the North American Site Selection Standards?			1			1
4. Does your website list key contacts?		1			1	
5. Does your website include a list of available real estate?	1			1		
Total	2	2	2	2	2	2

Source: MDB Insight, 2017.

FIGURE 57: INVESTMENT READINESS CHECKLIST: OTHER MEDIA CONSIDERATIONS

Other Communications Considerations	Brooks			Newell		
	Yes	NI	No	Yes	NI	No
1. Has your municipality reviewed and improved the mapping used to illustrate your regulatory and promotional documents?	1			1		
2. Do you maintain regular contact with media representatives?	1			1		
Total	4	0	0	4	0	0

Source: MDB Insight, 2017.

FIGURE 58: INVESTMENT READINESS CHECKLIST: SCORECARD RESULTS

Investment Readiness Scorecard	Brooks			County of Newell		
	Yes	NI	No	Yes	NI	No
Part I: Expertise						
▪ Contacts	6	2	0	2	4	0
▪ Land Use Planning	18	6	3	20	5	3
▪ Liaising with Existing Business in your Community	4	1	1	4	1	1
▪ Information Services	2	0	1	2	0	1
Part II: Resources						
▪ Industrial Land Inventory	22	2	5	22	2	5
▪ Joint Ventures	4	0	0	4	0	0
▪ Economic Development Capacity	8	1	3	8	1	3
Part III: Communications						
▪ Community and Site Selection Profile	26	5	13	26	5	13
▪ Website	2	2	2	2	2	2
▪ Other Communication Considerations	4	0	0	4	0	0
Investment Readiness Sub-Totals	96	19	28	94	20	28
Investment Readiness Total ("yes" + "NI")	115		28	114		28

Source: MDB Insight, 2017.

Analysis of Investment Readiness Checklist Results

The checklist outlined above is taken by subsection and commented on regarding gaps or shortcomings. For each subsection, a brief description of the context will be provided, along with some commentary on key opportunities to address areas requiring improvement or where there is currently no formal activity, process, or procedure in place.

Recall that the highest possible score is 192 and that the following framework indicates the level of investment readiness:

- Greater than 163 = Your municipality is very investment ready and well positioned (85% or greater)
- Between 96 and 162 = Your municipality is investment ready but there is room for improvement (between 50% and 84%)
- Between 67 and 95 = Your municipality is close to being investment ready but requires some additional work and changes to be made (35% to 49%)
- Below 66 = There are lots of opportunities for your municipality to ensure its investment readiness (below 35%)

Overall, Brooks scored 115 out of a total 192 points, resulting in a readiness score of 60%. The score indicates that Brooks is “investment ready” but also has “room for improvement”. The majority of the score was comprised of full marks (i.e. results that were not under the “Needs Improvement” column). For the County of Newell, the result is almost identical at 114 out of 192, which results in a 59%. This also means that Newell is “investment ready” but also has “room for improvement”.

The primary reason for the closeness in scoring between Brooks and the County of Newell is that many are reliant on the same role that is currently performed by the Economic Development Officer (EDO) roles and other pooled activities, such as site selection tools and community profiles. However; there are also areas where County of Newell lags in comparison to Brooks. These are most prominently in terms of knowledge about policies and bylaws of the County by the EDO, which is something that will likely be remedied in the short-term as the new EDO comes to know more about the County.

The most common reason for the awarding of “needs improvement” scores relates to the fact that there are currently many informal processes in place or because items identified are not easily located on the Web. Challenges associated with Web tracking can be traced to the fact that both the County of Newell and Brooks each have a web page dedicated to economic development, as well as the Chamber of Commerce (www.opportunitynewell.com), and a site selection tool (www.navigatenewell.com). Each site has different content, and there is a lack of coordination between them in a way that would steer all users to a common location from these separate sites. For the external observer, the variety of information without a focal point can have the effect of causing confusion or frustration.

The remainder of this section will identify the key gaps identified in each sub-category of the checklist, and make suggestions that may help them be addressed. These tools are customized based on the results of this assessment, and in some cases will point to best practice case studies as models worth investigating.

Contacts

This component scored well for Brooks, where the lowest two scores were for *familiarity of the EDO with land use planning, development approvals, and building permit process* and *understanding of the site selection response protocol*, where Brooks received Needs Improvement scores. These were because the EDO specifically does not have a large knowledge of the planning related process (although other staff members certainly do) and because although there is understanding of what to do regarding site selection responses, there is no formal protocol in place. A formal site selector response protocol is therefore needed. Essentially, both issues can be enhanced through stronger documentation.

For County of Newell, the scores were overall lower because the EDO is still learning both planning systems, which will be mended with time and cognisance of the need to grow knowledge in these areas.

Land Use Planning

Out of the 20 indicators in this category, Brooks only got "No" responses for three:

- Up-to-date official plan and zoning bylaw (as measured as within the last five years)
- Having a flowchart demonstrating the approvals process
- Available information on how long it will take different approval processes

The zoning bylaw is most challenging, because it requires formal commitments from Council and a significant allocation of staff resources.

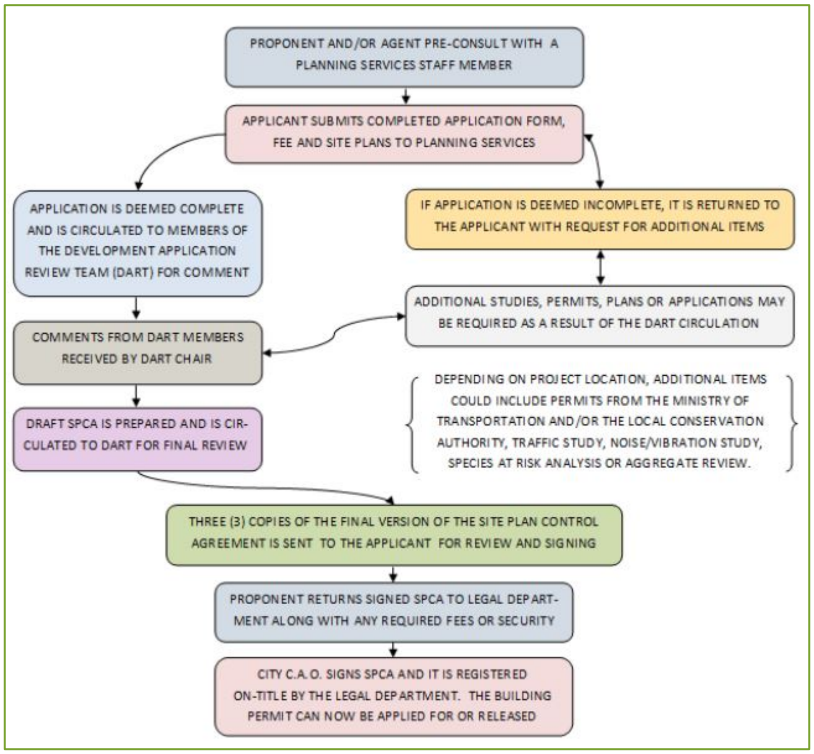
The flowchart is easily remedied by the creation of a visual graphic. This can be very detailed, and come to include all possible considerations for development, such as the model used by the City of Lethbridge for Land Development Process[35], or can be a simple visual aid that helps developers understand the overall process and key components of it, such as the flow-chart shown in the City of North Bay's Development Handbook (excerpt is shown below)[36]. While the Lethbridge website is certainly more comprehensive, it also risks coming across as daunting; whereas the North Bay flowchart is more traditional and less intimidating.

> **Key Best Practice**: Develop a flowchart that outlines the main components of the approvals process. Consider using the North Bay flowchart as a model. Ensure the resource is easily found online

[35] City of Lethbridge (n/d), Land Development Process: http://www.lethbridge.ca/Doing-Business/Planning-Development/Pages/Guide-to-Land-Development-Process.aspx

[36] City of North Bay (2015) "A Guide to Land Use and Development in the City of North Bay": pp.8.

FIGURE 59: EXCERPT FROM CITY OF NORTH BAY'S DEVELOPMENT APPROVAL PROCESS FLOWCHART



Source: City of North Bay (2015) "A Guide to Land Use and Development in the City of North Bay": pp.8.

The other item that relates to how long different approval processes usually take is also a relatively easy fix. Moreover, there is probably a way to integrate the typical turnaround time for each phase into the aforementioned flowchart. The focus should be on how long it typically takes for traditional approvals and for those requiring bylaw amendments.

There are several items in that received "needs improvement" scores in the *Land Use Planning* section, and these all relate to challenges in being able to easily find the resources or information online. The solution is a single consolidated site for all economic development-related resources and information.

The main exception to this trend is in regard to following up with successful applicants to see how customer service can be improved. Though this practice is conducted in an informal manner, there is no official procedure currently in place. As noted by the United Nations Conference on Trade and

Key Best Practice: Ensure a follow-up program is in place to consult successful land development applicants about possible opportunities to enhance or improve the approval process or identify other possible areas of concern.

Development, investment in after-care programming is a highly under-utilized tool in the investment attraction tool-kit.[37] Often new business investments have ties to supply chains or will require services. If some elements are easily applicable to the local municipality, a larger cluster may develop around the new business.

Liaising with Existing Businesses

This component relates to business retention and expansion-related activities or economic gardening. Of the four questions in the section, only one received a "No" score and another received a "Needs Improvement" score. The same pattern was identical for both Brooks and County of Newell because the items in the list pertain to economic development activities, which are handled jointly for both municipalities, as well as on behalf of several other smaller towns.

Where the "No" score was recorded was in regard to having a senior member of the organization monitor/evaluate the community's track record on liaising with existing investors. In other words, is there a formal means of reaching out to and getting feedback from local business owners about the City or County's business policies? Certainly, it is an intention of many economic development offices to engage with local businesses in order for them to "have their say" in a variety of different ways. The challenge often comes down to available time and resources. There are tools for ensuring the organization has a good read of the local pulse and is taking steps to seek solutions to challenges that are identified in the process. Elgin County, in Ontario, conducts an annual BR&E outreach survey[38]. A unique quality of the survey is that each year a different target industry serves as the focus of the survey and corresponding report (e.g. tourism, manufacturing, etc.), but every four years a broad survey is conducted across all sectors. The beauty of this survey process is that it relies on an existing business directory and the help of interns to conduct the actual survey.

Key Best Practice: Use the business directory and a summer intern to identify a sample frame from which to conduct an annual BR&E survey, which will help to identify opportunities to support and help local businesses grow.

Information Services

This section of the checklist is among the shortest in the process, comprised of only two evaluation questions:

- Can you reach utility representatives in your area with a single phone call to answer technical or pricing questions?
- Do you communicate with provincial/federal agencies to learn about new policies, programs, information or issues/trends?

The first question, scored a "no" value, while the second scored a "yes". It was confirmed that there is no existing key contact list that would enable easy and direct access to a representative from any local or regional utility companies. Sometimes investors may have specific questions about capacity and rates that may be different than the standard information available, such as in a community profile. In such

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[37] United Nations Conference on Trade and Development (2008) "Aftercare – Reaching Out to Your Investor Community," November 2: http://unctad.org/en/Docs/webiteiia20082_en.pdf

[38] County of Elgin (n/d) Documents and Reports: refer to the section titled "Business Retention & Expansion Report": http://www.progressivebynature.com/business-resources/documents-reports

instances, it becomes important to have a contact at each utility that can easily answer technical questions that may be beyond the level of understanding of an EDO or Planner. Thus, it becomes important to have a strong network of connections at all utility providers, which is verified and updated at least once per year.

Industrial and Commercial Land Inventory

This category is where Brooks and Newell both fared quite positively. Given that out of 18 questions (of which 11 were directly evaluating the specific content in the land inventory), both only answered “no” for five each, with an additional two each being “Needs improvement”, the findings indicate that Newell Region is well positioned to leverage its land assets to potential investors. The www.navigatenewell.com website contains many useful data fields. Currently, there are several data field areas that if added to the existing tool, would make for simplifying research for site selectors. These include:

- Taxes – Although tax rates are available in the Community/Economic Profile for Brooks and the County of Newell, they are not indicated on the individual site listings
- Utility providers and capacity – A list of local utility providers and specific capacity details would make number crunching easier for site selectors, especially since many of the details and numbers will remain the same for most sites and can be based on information in the Community/Economic Profiles
- Information on site contamination – For transparency reasons, it is viewed as a best practice to indicate if site contamination issues exist. Currently, there is not even a database field that tracks this in the existing tool.
- Telecommunications providers and related information (e.g., availability of fibre optics and digital switching) – A field Available bandwidth, upload/download speeds, and providers
- Transportation network access – Lists of nearby main traffic arteries and distance to them

These items can easily be added to the existing database architecture so that future items added to the listing will be able to show data about these areas. Businesses that may be looking at Brooks are going to find out these costs eventually if they are making a serious decision, and ensuring that data is available and transparent is a way to instil confidence that there will not be any surprises down the road.

Joint Ventures

As this commonent is related to regional collaboration, which is the prime driver to the current economic development framework, as well as joint partnerships with organizations such as the Chamber of Commerce, it was observed that Brooks and Newell are both performing well in these areas. There may be some challenges between the “public” and “private” dimensions of these relationships, but the relationships are seen to be much stronger than it has been in the past. Stakeholder consultations confirm that the municipal and Chamber relationship has not always been smooth, but in recent years has grown to be more collaborative.

From an outside perspective, there is one thing that could potentially be addressed to better help people that are not familiar with the economic development ecosystem in the region. Specifically, there is a lack of clarity about who is “driving” the economic development engine in the region and who is ‘supporting it’. The reason this is identified is because from the outside the impression is that there are a lot of players, but a lack of clarity about how they all relate to each other. These relationships need to be clarified across all economic development websites (whether municipal or otherwise). A consistent narrative is required. These challenges are brought up in the context of the discussion of *Joint Ventures* because it seems the most fitting place for which to provide a critical assessment. It is acknowledged that such observations fall outside of the scope of the *Investment Readiness Checklist*; however, they represent an important opportunity for enhancing to value proposition of the region.

Economic Development Capacity

Economic development capacity scoring was uniform for Brooks and Newell. By far the most lacking area in the section relates to having an existing economic development strategy. While there is a work plan in place, which was based in part on observations from a business survey conducted in 2016, there is no formal strategy for directing economic development activities.

Other areas identified as missing sufficient activity include:

- Key contacts in both private and public sectors that can provide advisory and technical assistance in key areas (e.g. forestry, mining, real estate, telecommunications, trade agreement, taxes, etc.)
- Office/staff to create a one-window development process

For the first item, related to key contacts, it is important to understand that having a strong network of expertise can be helpful for two reasons. First, they may understand the opportunity structure in a given sector more than a generalist such as an economic development officer. Second, they can be crucial references for potential investors to be put in contact with. It is therefore essential that the EDO develop a list of leading businesses across various key sectors, and point persons within these organizations. As noted, this should also be in areas that may not be important for a specific sector, but to businesses more broadly, such as tax experts, utility contacts, and so forth.

The other point about a one-window development process reflects a growing tendency in municipal policy to streamline and localize all development-related activities to occur within a single contained system that is administered by a key point person.

Community and Site Selection Profiles

This section had a mix of levels of readiness. By far this section is the largest because it deconstructs the community profile into a discrete list of indicators and asks whether they are provided in the community profile. Because Brooks and the County of Newell share the same documents, and because there is both a community profile and an economic profile, the region is already competitively well positioned, as many communities do not even have any such documents in place. The two documents are treated collectively as a single document for the purposes of this analysis.

The profiles have a range of useful content that is informative to the reader, while also conveying a strong sense of community and quality of life attributes.

That said; there are a few indicators that had been listed in the checklist that did not materialize in either profile.

- A labour force profile, including a summary of wage rates by occupation type
- An education attainment levels
- A list of major private and public sector employers
- A summary of the local industrial, commercial and residential real estate markets, including the cost of building permits per square foot capacities, waste disposal facilities, gas and electrical rates
- A list of local financial institutions
- An inventory of existing businesses in your community along with number of employees
- An overview of telecommunications services and infrastructure
- Testimonials from local businesses

These items can be addressed in future versions of the profile. One possibility, given that a large number of printed versions of the profiles have been made, is to create an additional 'Fact Sheet' that can be treated as a set of supplemental information. This can be located in the same area as the current Profiles are on the appropriate website.

Another item related to the profile overall is that, according to the checklist, it should be verified and updated at least twice per year. Most data provided in the documents should not have to be updated very frequently, such as data related to the Canadian Census or other Statistics Canada sources that are not updated frequently, but some data is likely to require updating on a semi-regular basis. These could be items such as tax or utility rates.

There are two other areas that will require attention. First, the region needs to ensure that site selection profiles (such as those used in the Navigate Newell website) adhere to International Economic Development Council (IEDC) site selection standards[39]. The content covered in the standards follow the same logic as the list of site selection property profile listings in the *Industrial and Commercial Land Inventory* section of this assessment. A copy of IEDC's Site Selection Standards can be ordered online at a cost of USD $75. As an additional point of merit, the Standards come with bragging rights which allow for positive public relations messaging about the viability and quality of site selection data.

The second area for improvement is in regard to monitoring investment attraction activities. Currently, there is no process for monitoring investment attraction performance (i.e. the number of leads, the number of leads converted to sales, reasons for loss or wins, etc.). The more that is known about who has been interested in the Newell Region and why or why not they ultimately decided to locate or not locate a business in it, the better it will be for Newell Region in the long run.

[39] International Economic Development Council (2016) "Site Selection Data Standards" : http://www.iedconline.org/web-pages/resources-publications/site-selection-data-standards/

Tracking leads and the outcome can be equally important in learning about what is working well or not well in the Newell Region. Given that economic development in Newell Region constitutes a variety of municipal and other stakeholders, a lead handling protocol would also be beneficial in helping to ensure that potential investors or leads are put in touch with the right person to lead the investment attraction initiative. The Town of Vegreville (Alberta) has a solid lead handling protocol which deals with lead generation, database management, and follow-up considerations. The Vegreville model represents a real-world application as the lead generation component of the Alberta's Investment Readiness Toolkit.[40] Taking Vegreville and the Toolkit together, the Newell Region will be positioned to track and monitor investment opportunities and understand critical learnings about why investments were successful or not.

Website

This is the weakest overall section in the checklist, largely because the existing websites are fragmented and come across as confusing to people outside the community. The first question in that section deals in assessing whether there is a single stand-alone economic development website, which by all accounts is not the case in the region; which is why the score only received part marks. Despite knowing that copies of the community/economic profile were available somewhere, they were not easy to find, and for many people, it would easily be concluded that they are not available online because of challenges for external stakeholders in accessing them.

There is also a question concerned with North American site selection standards on the website. Here the focus is on the availability of this data online. The IEDC Standards should be implemented for the online content.

Other Communication Considerations

This final section of the checklist pertains to other communications considerations. There were two questions posed, of which Brooks and Newell both received full marks for both. First, the municipalities have up to do date mapping used in regulatory and promotional documents, and, second, the economic development office has regular contact with both local and regional media representatives. It is suggested that these leading practices continue to be kept current and engaged.

[40] Alberta Investment Readiness Toolkit (2012), see chapter 4.

Appendix D: Interview Analysis – Key Findings

Ten individuals were interviewed to gather a mix of local and external perspectives on how the City of Brooks and the Newell Region more broadly fit as a competitive region within the southeastern portion of the province. Interviewees included a commercial developer, an equipment rental company, and a property owner. Overall, interviewees pointed to the quality of life assets, the strong oil and gas, agri-food, and tourism sectors, the 'open for business' attitude of the City and the strong regional collaborative spirit as key strengths for Brooks. Interviewees highlighted the cost of industrial land as a challenge to the City's competitiveness. The following section provides a snapshot of the discussions with the interviewees.

Interview discussion

The high quality of life, as well as the strength of the oil and gas and the agri-food industry, were highlighted as important assets to leverage for attracting new investment into the region. Interviewees discussed the high quality of life as an important strength of the region, citing recent investments into recreational facilities as well as Lake Newell and the Dinosaur Provincial Park. Connected to these assets is the growing tourism sector, which brings in visitors to the area. Both the oil and gas sector, as well as the agri-food (including both agriculture and meat processing), were seen as key assets in attracting new opportunities for the community, building on the high concentration of existing businesses in these sectors. One interviewee highlighted the City's proximity to the TransCanada Highway and Highway 36 junction as an important asset for attracting new investment. One interviewee stated that they felt that the City is 'stuck in the past' and is not proactive about attracting new businesses. Building off this sentiment, interviewees provided ideas on opportunities for investment, including educational businesses related to ESL programs, elderly facilities, as well as programs dedicated to seniors.

Issues around infrastructure and the lack of quality, up-scale restaurants were seen as issues in Brooks. One participant discussed the needs for a municipal A-Z guide for navigating city processes (e.g. development process). Another highlighted how interactions with City staff have improved in recent years, with investors receiving additional guidance through municipal processes and receiving packages related to municipal processes. A second concern raised was the number of vacant and under-developed spaces, which should be used as incubator spaces to support the growing entrepreneurial climate in the City. The high price of industrial land was also seen as a concern as was the stigma related to the smell of the meat processing businesses. The issue of the mobility of immigrants, who lack driver licenses, was also raised as a concern.

One interviewee suggested the need to think creatively and out of the box, highlighting the town of Okotoks as a best practice in terms of creating a unique and creative advertising and marketing campaign. Another discussed the need to develop more restaurants and night-life assets to attract younger people to the city. A third suggested a gap analysis be undertaken to identify businesses and services which are currently missing from the City. This would help the City to find opportunities to leverage existing businesses and assets to attract new investment (e.g. wind or solar renewable energy) which would not only diversify the local economy but also help its growth.

Three main opportunities were discussed for the City to prioritize as it promotes itself as “a community ready for development”. First, interviewees highlighted the tourism related opportunities, leveraging the National Parks Pass for 2017, the tourism assets along the Highways 1 and 36 corridors. One participant pointed to the creation of the new indoor sports facility as an advantage to develop tournament programming locally. The participant also saw tourism promotion as a means to intermunicipal collaboration. One interviewee highlighted the opportunity to leverage the existing outdoor spaces to create new outdoor festivals, possibly hosting Project 52, where the City, in collaboration with neighbouring communities and the Newell Region Tourism Association, hosts 52 two-day events. Collaboration also has the potential to enlarge the market for attracting visitors and investment.

Second, interviewees discussed opportunities related to trade and industry. One interviewee highlighted the strength of the oil and gas sector and the opportunity to attract supporting and relating businesses to the area. Another discussed how old rail lines are increasingly being bought and redeveloped as an opportunity for Brooks to pursue. A third pointed to the growth in business incubator spaces and opportunities in the City, which could be used to help transition oil and gas workers into new fields. This interviewee also felt that the City should promote the Business Link more actively to its local entrepreneurs.

Third, interviewees pointed to the need to develop a long-term vision for the community, which celebrates the diversity of Brooks. Interviewees highlighted how the diversity of cultures in Brooks is seen as refreshing in rural Alberta and should be shared and celebrated. Additionally, one interviewee discussed the need for someone to champion a new direction for the City and help build buy-in for new opportunities.

Focus Group Analysis – Key Findings

Two focus groups sessions were held with stakeholders from the City of Brooks and County of Newell in January 2017, to gather their perspectives on what was working well and opportunities for improvement related to investment attraction. One session targeted elected officials and senior municipal staff from around the region, while the other focused on local business and community leaders.

To begin the conversation, participants were asked about the positive news stories from the region as a whole in the past five years. Stakeholders discussed a number of lifestyle related stories, including investment into both the Centennial Regional Arena and the Lakeside Leisure Centre as key assets for the area, the Brooks Bandits winning the national championship in 2013, and Brooks being named a national finalist in the Communities in Bloom challenge.[41] Participants also discussed the movie shoot in Dinosaur Provincial Park as providing good press for the region. These lifestyle assets are also used to support a growth in tourism exposure for the region. Collaboration within the region was also discussed as a key theme, as stakeholders discussed the recent efforts to work together regionally, pointing to the cooperation between the County and the City in terms of shared services (e.g. recreational, garbage collection) as well as the regional water system. Participants also highlighted the diversity of the region as something unique, stating that Books is seen as a model for other rural community for celebrating diversity. Other stories include the stabilizing meat packing sector and recent investments in broadband connectivity.

The oil and gas and the agri-food processing sectors are recognized as the top industries in the region, therefore stakeholders were asked to highlight other important economic sectors. Participants pointed to both the tourism and the manufacturing (including metal manufacturing and technology-oriented, oil and gas related manufacturing) sectors as key industries. Stakeholders discussed the Crop Diversification Centre as a great asset for the agri-food sector but noted the lack of value-added agriculture businesses in the region. The immigrant population was also seen as an asset to further leverage by developing social services, educational and entrepreneurship resources catering to the diverse cultures in the region. Stakeholders also pointed to the establishment of culturally-defined businesses as something exciting happening in the region.

Participants were also asked to discuss the cost competitiveness of the region compared to other areas like Medicine Hat, Strathmore, and Lethbridge. Stakeholders noted that utility and property assessment costs are lower in the region compared to other municipalities. While there is a local perception that Brooks is more expensive than neighbouring communities, participants felt that this was not necessarily true, highlighting the economies of scale being a challenge for the City as it not big enough to attract a large market while being too large to support a small market. Stakeholders did note that residents are shopping outside of the region more often than they used to, particularly for accessing retail shops (e.g. Costco, Walmart, Staples).

Stakeholders highlighted a number of partnership opportunities to support the region's investment readiness. While Community Futures is relatively recent to being in Brooks full time, one of its mandates in to support economic development efforts, including investment attraction. Medicine Hat College's and Cypress College's Brooks Campuses were pointed to as key assets to leverage for the future. Participants discussed possible future collaboration efforts between the Brooks campuses and other regional colleges, as well as highlighted the benefits related to ESL programs, trades programs, and youth retention. The Local Immigration Partnership was also highlighted as key agencies for future collaboration.

Stakeholders also highlighted how regional agencies complement and build on one another. However, concerns were raised that the Crop Diversification Center was

[41] Communities in Bloom is a national program focused on enhancing green spaces in communities.

underutilized and has challenges related to communication. Stakeholder discussed how agencies are largely inwardly focused and fail to communicate their needs to other agencies in the region as well as issues related to the dissemination of program information to the communities. Participants also highlighted the perception that the Brooks and District Chamber of Commerce is seen as Brooks-centric, with the desire for increased uniformity and the need to change the language to support the renewed efforts of regional cooperation.

The final question for focus group participants related to opportunity for encouraging entrepreneurs (start-ups) and existing businesses to thrive within the region. Stakeholders recognized the strong entrepreneurial spirit and the quality infrastructure to support businesses in the community. To support entrepreneurship, participants discussed the need for more mentorship and network development opportunities, small business boot camps as well as the creation of a business incubator location. Stakeholders also pointed to the cumbersome process of starting a business in the region, which could be simplified with the dissemination of a package filled with information that people need to know. Succession planning sessions, particularly for the agricultural sector, was pointed to as an opportunity to support both new and existing businesses in the region as well undertaking a gap analysis to understand what kinds of commercial businesses are needed in the community. By undertaking a gap analysis, the region will be in a better position to support its existing businesses, which thrive off synergies with other businesses. Stakeholders did feel that Brooks was going a good job in collecting feedback from businesses but felt that the City could do a better job a sharing success stories on social media.