

# Lake Cowichan First Nation: 5-Year Economic Development Strategic Plan

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# Lake Cowichan First Nation: 5-Year Economic Development Strategic Plan

## Executive Summary

The Lake Cowichan First Nation embarked upon an ambitious journey when it made the decision to adopt a community-based approach to developing its 5-Year Economic Development Strategic Plan. It did so because the community members and its Chief and Council were ready to embrace change. The community recognized the economic development potential of its lands and resources, and of its location and wishes to capitalize on the opportunities that exist.

The Lake Cowichan First Nation Economic Development Strategic Plan is a strategic plan for the future of its economic development. The strategy is meant to be viewed in the following ways:

1. **As direction for making short, medium, and long term economic planning decisions.** It can be use as a guide for all economic development initiatives, planning, and development initiatives, and strategic investments into specific sectors, projects, and developments. The intent of the strategic plan is that future Lake Cowichan First Nation organizations, private, institutional and non-profit investments work toward the goals identified in this economic development plan.
2. **As a guide for the creation and development of future economic development work plans and budgets.** This strategy entails review and flexibility of existing processes for development and the creation of new programs and processes for the future.
3. **As the source of ideas and inspiration for ongoing community participation and involvement in community economic development.** Achieving the objectives of this strategy will require the involvement of community and outside organizations, government, business and stakeholders. This strategy should serve as a source of ideas and inspiration for actions aligned with mutually supportive goals and objectives.

For Lake Cowichan First Nation, this 5-Year Economic Development Strategic Plan is a starting point rather than the end point of a process that will take the community out of a state of dependency and into an era of prosperity that will reestablish the Nation's place in its traditional territory and in a competitive position in the regional, provincial, national, and global economy. Effective implementation of this

report will require constant review. New information and ideas will need to be incorporated into the report from time to time. This report must therefore be dynamic and responsive to the ever-changing economic and social environment.

## The Introduction

In recent years the Lake Cowichan First Nation has been under considerable pressure both internally from its membership and externally from other First Nations, potential public and private joint venture partners, and provincial and federal governments to move forward on the economic development front. The Lake Cowichan First Nation has for many years relied on government funding for its core program and service delivery, and for project funding to meet its specific social and developmental needs. In more recent years demand on the Lake Cowichan First Nation to meet those needs has increased while the funding amounts have not kept pace with the increasing demand. And Lake Cowichan First Nation has until recently had limited to no opportunity to supplement public sector sources of funding with its own economically driven sources of income. Due to the known historical context of First Nations generally and Lake Cowichan First Nation specifically there has been little to no opportunity to participate in local, regional, provincial, national, and global economies.

But times have changed, and along with them so has Lake Cowichan First Nation's prospects for the future. Lake Cowichan First Nation recognizes this and wishes to embrace the changing times, and to take advantage of opportunities that will act as springboards into economic participation that most Canadians take for granted. These opportunities come from a myriad of contemporary sources, but most notably from opportunities arising out of the British Columbia Treaty Commission treaty negotiations process, the associated Incremental Treaty Agreement process that allows engaged First Nations to realize early returns from the treaty negotiations process, and from recent developments in the law related to First Nation consultation and accommodation, along with changes in federal and provincial programming that reflects the mutually beneficial consequences of encouraging First Nation economic development planning and development. In the minds of the Lake Cowichan First Nation community the time is right to put the Lake Cowichan First Nation community on the map!

Putting Lake Cowichan First Nation on the map is a multi-pronged effort that occurs at a number of levels. Historically, the Lake Cowichan First Nation people were the gatekeepers of the lake, playing prominent roles in the economies that impacted other First Nations to the north, south, east, and west of their villages on the Lake.

They were numerous in population, steeped in traditional knowledge about their lands and resources, and as evidenced in the ethno-historical record, actively engaged in many aspects of economic activity in and around the lake and beyond their traditional territory. Lake Cowichan First Nation is working toward regaining its status as gatekeepers and toward putting its mark on the political, social, and economic landscape of the region that lies within its traditional territory, and to impress upon provincial and national governments that it is preparing to join the broader economy in due time and fashion. To that end Lake Cowichan First Nation is taking the necessary first steps through all available means to reestablish itself. One of those critical first steps is the preparation of this economic development strategic plan.

### Developing “The Plan”

From the outside looking in Lake Cowichan First Nation is ideally situated for economic participation and even fast paced growth given its location. Lake Cowichan First Nation is located on the north shore of the east end of Lake Cowichan on Vancouver Island. It shares its borders with the Town of Lake Cowichan and is in effect a reserve that is situated in an urban setting. The geographical area is currently home to an active forestry and tourism economy, and a burgeoning residential community that serves as home for commuters to jobs and services in Duncan, Victoria, Nanaimo, and areas in between. And the potential exists, not only for growth in existing economic sectors, but for the energy, housing, light industrial, commercial, and service delivery sectors to develop in the area.

From the inside looking out however, this favourable economic perception presents challenges for Lake Cowichan First Nation as it embarks upon its economic dreams. Key challenges are created when opportunities arise that cannot be taken up due to lack of knowledge, expertise, capital resources, or general capacity in the community. Lake Cowichan First Nation has been frustrated time and again in the past in its efforts to develop business that would expand its economic boundary beyond one that is dependent upon funded programs. In response to this frustration Lake Cowichan First Nation recognizes the need to plan for the future, to plan for change, to plan for control and to be in position to seize opportunities for economic development that fits within its community’s vision.

From the start Lake Cowichan First Nation decided that its economic development strategic plan would be a future looking plan that could be looked to for direction when making planning decisions, creating related business and economic plans and budgets, and as a source for ideas and inspiration for community action and

collaboration. To achieve this Lake Cowichan First Nation set out to create a team of experts and community members who would engage with the community to develop the economic plan. Lake Cowichan contemplated that personnel with strategic and economic planning, financial and business structure, land and resource use and planning, and organizational governance expertise could team up with community members to not only provide advice but also build capacity among the community members.

Lake Cowichan First Nation held community sessions introducing and preparing community members for year one of its 5-year economic development plan. Interactive sessions were held with the community to introduce and engage community members in visioning, environmental assessment, and vision and mission statement development exercises. Informational and interactive sessions dealing with land and resource use planning, including a discussion of traditional uses and management, were held with the community. And an informational session dealing with available financial and business structures suitable for the circumstances of First Nation business and economic development, was held with the community. In addition to this the technical team spent a considerable amount of time gathering resources the community would need to continue its planning exercise.

As a result Lake Cowichan First Nation's experts created three key documents to support its ongoing work with the economic development strategic plan. They include:

- *Putting Lake Cowichan First Nation on the Map: Through Effective Community-Based, Strategic Economic Development Planning*; Report submitted by Warren Weir – December 2011, Updated February 2012;
- *Assessment of the Cowichan Lake Drainage and Hul'qumi'num Treaty Group Statement of Intent Area For Lake Cowichan First Nation Economic Opportunities*; Report submitted by Tawney Lem – March 2012;
- *Lake Cowichan First Nation: Corporate Structure Planning* – Presentation by Russ Harder – March 2012;

The essence of any economic development strategic plan includes the key elements of establishing a community vision, setting goals and objectives, developing strategies and actions, setting monitoring mechanisms and performance indicators, and outlining a management plan for the economic development plan. Lake

Cowichan First Nation set out as its goal for year one to create a comprehensive 5-year economic development plan that focused on these key elements.

In actual fact a key result of this first year of the five-year economic development strategic plan for Lake Cowichan First Nation was “learning to plan”. This initial phase of the creation of this economic development plan commanded much of the time spent on the project, attesting to its importance prior to moving forward to consider other steps of the planning process. This is particularly true given that comprehensive planning had not been done prior to this occasion. And given that much of Lake Cowichan First Nation’s focus was on community-based strategic planning and “learning to plan” this first year’s version of the Lake Cowichan 5-Year Economic Development Strategic Plan will reflect more of the findings and less of the technical analysis of the findings of its experts. The findings herein are not reflective therefore of in-depth economic base modeling or economic base analysis, nor does the economic development plan attempt to establish industry targets and related rankings in this initial version of the plan. This work is now relegated to year two of the Lake Cowichan First Nation 5-Year Economic Development Plan. This plan however does provide a general overview of economic sector activity in and around Lake Cowichan First Nation. But to begin the following sections will highlight the Lake Cowichan First Nation community sessions, the methodology and findings from its strategic planning session, followed by an overview of the comprehensive assessment of current land uses, and the corporate structure planning session.

Lake Cowichan First Nation notes that its economic development planning must be responsive to its need to allow for changes in thinking about economic development overall and to that end sees the development of its 5 year strategic plan as an evolutionary and dynamic process. The Lake Cowichan 5-Year Economic Development Plan is therefore a living document that will be revisited at defined times throughout the 5 years to ensure the plan reflects Lake Cowichan First Nation’s understanding of the contemporary economic situation.

### [Lake Cowichan First Nation Profiled](#)

Location: Lake Cowichan First Nation is located on the north shore of the east end of Lake Cowichan on Vancouver Island. It shares its borders with the Town of Lake Cowichan and is in effect a reserve that is situated in an urban setting. The Lake Cowichan First Nation Reserve consists of one 39-hectare reserve.

Demographic overview: The first thing to note is that present day Lake Cowichan First Nation is not heavily populated. While the ethno-historical record speaks of villages and village sites with over 500 people, the official record shows that the Lake Cowichan First Nation population is 15 according to the 1996 Canadian census. That represents a 50% increase in population from the 2001 Canadian census. More importantly the First Nation continues to grow and is now home to approximately 30 people, 20 of whom are registered community members. The housing level has doubled in recent years with the building of 3 new homes for a total of 6 homes on the Lake Cowichan First Nation. The community is also home to a new band administration office with all the modern amenities for interactive communication.

The population on reserve is roughly equally distributed among youth, middle aged, and senior/elder categories. The majority of the working age members are employed, many involved with various programs at the First Nation administration office although some members are employed off reserve. The income level of the employed members is commensurate with other similar jobs in the nearby communities and with other First Nation administration positions.

A few of the members and others who are living off reserve have attained college diplomas and/or university degrees, and one member is currently attending university. Generally, there is a higher level of educational attainment.

The population of Lake Cowichan First Nation has doubled twice in the last ten years and will likely continue to do so. Given the desire and willingness of the current population to move forward on all fronts and to reestablish its traditional place in the area, and the potential for economic growth in and around the community the future looks bright for Lake Cowichan First Nation. It is expected then population growth by in migration will add to population in the short and longer terms.

### Lake Cowichan First Nation Community Engagement: Strategic Economic Development Planning

This section highlights the culmination of Lake Cowichan First Nation's pre-planning and "learning to plan" sessions. Through these sessions Lake Cowichan First Nation community adopted a community-based strategic planning approach to economic development, provided initial visioning on potential business ventures, and participated in a SWOT scanning exercise. These exercises prepared community members for participation in development of a community economic development mission and vision statement that is the subject of the next section. And the follow

up sessions with team members guided subsequent sections of the economic development strategic plan. Team member Warren Weir, Dean of Instruction, Nicola Valley Institute of Technology, Merritt, British Columbia, facilitated the sessions. His report is replicated here in considerable detail, and is attached as Appendix A to this strategic plan.

***In the nation-building approach, decision-making is strategic.***

*One of the primary characteristics of the standard approach to Native economic development is its quick-fix orientation. The alternative is strategic thinking: approaching the development challenge not by asking “what can be funded?” but by asking “what kind of society are we trying to build?” and “how do we put in place the systems and policies that will attract and hold the people and the capital that the nation needs?”*

*Such a strategic approach involves a shift*

- from reactive thinking to proactive thinking (not just responding to crises, but trying to gain some control over the future);
- from short-term thinking to long-term thinking (generations from now, what kind of society does the nation want to be?);
- from opportunistic thinking toward systemic thinking about larger goals (focusing not on what can be funded, but on whether various options and strategies fit the society the nation is trying to create);
- from a narrow problem focus to a broader societal focus (fixing not just problems but communities and their cultural, social, political, and economic health).

*Such changes require that a community’s leaders determine long-term objectives, identify priorities and concerns, and take a hard-nosed look at the assets the nation has to work with and the constraints it faces. The result is a set of criteria by which specific development options can be analyzed: Does this option support the Nation’s priorities, fit with its assets and opportunities, and advance its long-term objectives? If not, what will?* [Rebuilding Native Nations: Strategies for Governance and Development. 2007. Miriam Jorgensen (ed), The University of Arizona Press, pp. 25-26]

**1. Strategic Planning Overview: The Lake Cowichan First Nation (LCFN) Approach**

The Lake Cowichan First Nation is creating its own economic future by adopting a community-based strategic planning approach. The process they have chosen is based on a fairly generic strategic planning model, but differs from the norm as their process will be based squarely in the heart of the community. To the LCFN Chief and Council, this community-based process will include community consultation and engagement through, for example, meetings, surveys, and focus groups. This will lead to the development of a long-term vision, complete with specific economic and business venture goals, objectives, and strategies. When required, outside experts will be brought in to the process to provide guidance

with market feasibility, legal issues, partnerships, and financing, for example, of LCFN's long-term goals and objectives.

**The general strategic planning model the LCFN Chief and Council adopted seeks answers to four strategic questions:**

1. Where is the community (or business or organization) today?
2. Where is the community going?
3. How will it get there?
4. How will it evaluate its progress?

**The answers to the four questions (respectively) may be ascertained through the use of:**

1. The SWOT (Strengths, Weaknesses, Opportunities and Strengths) Analysis, also called an Environmental Assessment
2. Vision, complete with long-term goals
3. Mission, followed by yearly objectives, and strategies
4. Through management, and alternative monitoring and assessment tools

**Generally, strategic planning follows the following process, from top to bottom (in an iterative fashion)**



It is this process that the LCFN strategic management team, LCFN leadership, and LCFN community must become comfortable with while working toward developing a plan for the future. A common understanding of the process, the terms involved,

and the tasks at hand (at each point in the process), will enable the team and community to work toward a shared understanding of the future.

### **Next Steps: Tasks at Hand**

1. Create Mission, Vision, and Values Statements (Session Two, 1 to 2 days in length)
2. Develop long-term goals and strategies (Session Three, 1 to 2 days in length),
3. Write the shared community-based plan (\*see below), followed by
4. Deciding on selected experts and consultants to help with the implementation of the plan

### **\*The Strategic Plan:**

The LCFN strategic planning team (with assistance) is responsible for the creation of an engaging community-based and understood strategic plan, a document that the LCFN leadership can hand to potential clients, prospective investors, or partners. It is typically 18 to 30 pages in length, as follows (rough guideline):

- A. Introduction (3-5 pages)
  - i. Cover sheet
  - ii. Executive Summary
  - iii. Overview of the Strategic Planning Process
  - iv. Results of the Environmental Assessment (SWOT)
- B. Vision, Values and Mission (3-5 pages)
  - i. Values Statement (and backup information if required)
  - ii. Vision Statement (and backup information if required)
  - iii. Mission Statement (and backup information if required)
- C. Long-Term Goals, Strategies and Actions (5-8 pages)
  - i. Long-term Goals, Core Strategies and Actions (prioritized if possible)
- D. Performance Management (5-8 pages)
  - i. Short-term Goals or Key Success Factors
  - ii. Performance Indicators
- E. Strategic Management (1-2 pages)
  - i. Check-list of implementation tasks and management goals
- F. Conclusion (1-2 pages) with Next Steps

The rest of the report lays the informational groundwork required to begin the preparation of further community-based planning and the creation of a LCFN Strategic Plan.

## 2. Thoughts on Business Ventures (Initial Visioning September 9/10, 2011)

A community must have a strategic vision before it can develop a strategic plan. In this section strategic “vision” is briefly described, followed by the feedback from the LCFN session September 9 and 10, 2011. It concludes with reflections on the feedback.

A vision is a compelling picture of what a community can or should be doing at some future time. For an established community, a vision might be about change and growth; for a community embarking on a new economic venture, it’s likely to be an exciting picture of opportunities and anticipated successes. A vision “provides an organization with a forward-looking, idealized image of itself and its uniqueness” (Goodstein, Nolan, and Pfeiffer, page 38). If a strategic plan is to be community-based, a successful vision must in the end be a shared image.

Goodstein, Nolan, and Pfeiffer (page 38) show how a vision can be developed through envisioning, or “the process by which individuals or groups develop a vision or dream of a future state for themselves or their organizations that is both sufficiently clear and powerful to arouse and sustain the actions necessary for that dream or vision to become a reality.”

**Feedback from group:** At the September 10<sup>th</sup> session the participants felt that the following were ideas/options for future LCFN business development.

- float plane
- lakeside cabins
- campsites
- gift shop (website too)
- w/arts and crafts
- smoke shop
- drum making, etc
- mobile home park – lack of parking
- Land use (water and resources)
- canoe tours (LCFN logo)

It was suggested that it was important to know the history of LCFN (to get ideas from the past), while planning for the future, and that economic planning was for the youth. Community input was deemed very important. For example, the elders talk about sustainability -- to look after our own, leading to:

- less dependence
- more independence
- increased community cohesiveness

It was also agreed that economic development must proceed through an analysis of the options (above) through an assessment of strengths/weaknesses → most promising to be successful good basis for sustainability.

It was emphasized that although LCFN is a small community, it has big dreams that could be realized through a strategic plan: a plan that was empowering, and facilitated the community regaining control of its future - Actualizing dreams – making them real!!

It was agreed that it starts with small steps, but that the community would build up from there, noting that the economy it is in is tough.

Education and training is key.

The biggest opportunity highlighted was the resources of the LCFN – the land, and especially the location.

### **Vision: Next Steps**

It is important to build on these ideas when developing the vision and mission statements, which lend to the clarification of long-term goals and objectives (noted above). These visionary ideas will form the basis of the strategic plan, capturing the past, present, and future into coherent and relevant/meaningful (holistic) statements of intent.

### **3. Community Strengths, Weaknesses, Opportunities and Threats (SWOT)**

This section talks about the value of the SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis to community-based strategic planning, followed by the feedback on the LCFN internal Strengths and Weaknesses, and external Opportunities and Threats gathered at the September 10th, 2011 session. It concludes with some reflections on the feedback.

In order for a community to adequately prepare and plan for the future, it must know where it stands in the present tense. The LCFN community will never be able to move to an ideal future state if it does not know where to start. The following are the ideas on the LCFN's SWOT (current state of affairs), clarified at the September 10<sup>th</sup> session.

#### **STRENGTHS (internal to the LCFN community)**

- Members are motivated
- Basic needs covered
- Role models (education, leadership)
- Location (to town, etc) – rural/urban – res/comm.

- Land/resources – access to resources
- Continuity of leadership & Honest, Ethical leadership – committed leadership (28 years)
- Community involvement
- Willingness to succeed
- Size (people) – leadership, support, family, (pride and love)
- Warmth/Hospitality and representation
- good relations with other neighbouring First Nations, and also good representation on other First Nation organizations and boards
- Humour
- Serious re- the future
- Demographics
- Technology
- Infrastructure to expand
- Have priorities (community over business)

### **WEAKNESSES (internal to LCFN community)**

- Leadership “stretched” Relates to the ability to prioritize, requiring delegation
- Lack internal capacity (HR and other) – re: Business development (so rely on outside assistance)
- Size
- Money \$\$ (and access to \$\$)
- \$\$ income generating activity
- We are not on the map
- Currently don’t have Ec Dev plan
- Is not a business
- Dev “climate” in LCFN - no bylaws for that

### **OPPORTUNITIES (external to LCFN community – outside its borders and ability to control)**

- Media publicity and interest
- LCFN Branding + self-promotion
- Tourism and Services tourism
- Value-added (water, timber) and commercialization
- Community hall
- Campers
- Gaming
- Land
- Residential/Industrial development
- Interest in culture and spirituality
- Training/Apprenticing

- Traditional ways and IK
- Attractive to investment
- Town of LC
- Resource Partnerships
- Close to ed centres
- Mining, Fisheries, Forestry, Waste Management (contaminated sites) soil, etc.

### **THREATS (external to LCFN community – outside its borders and ability to control)**

- Seasonal climate + Market
- Town of LC/ (Racism) Myths re: in competition with local businesses)
- Government relation: Federal, provincial, municipal, and regional (CVRD)
- Funds/Activities – under control of others
  - pull/claw backs → incentive business dev
- Alienation of resources
- Neighbouring nations (re: shared territory) – business/resource use
- Laws/regulations (forestry, etc)
- Propaganda
- Differing Visions
- Competition
- Time
- Global financial markets

### **SWOT: Next Steps**

The SWOT ideas, outlined above, provide the planning team and LCFN leaders ideas on a) their competitive advantage (what makes them special), strengths to build upon, opportunities on which to capitalize, weaknesses to work on overcoming, and threats to circumvent.

### **4. Overall: Next Steps**

The LCFN needs to build on the work it has accomplished in the first session by broadening its net and engaging the larger community. This involves attention to planning to plan and community involvement. After these initial, yet important, tasks have been attended to, a strategic planning team should be organized with the authority to steward the planning process. That team will then work on the development of its vision, mission, and values statements, and community-based goals and strategies, working with external and community experts when required. Attention to stakeholder members (such as the Lake Cowichan town council, local business interests, and neighbouring First Nation advocates) is critical, as additional support and assistance will help to smooth the road to economic viability.

[The following segment of Warren Weir's report continues to be informative as a guideline for ongoing development and monitoring of the Lake Cowichan First Nation 5-Year Strategic Economic Development Plan]

Each of the following tasks will be touched on in this final section of the report:

- planning to plan
- organizing a planning team
- creating vision and a vision statement
- creating mission and a mission statement
- community values and the strategic values statement
- developing goals and strategies
- working with external consultants and stakeholders, and
- the strategic management of the plan.

### **Planning to Plan:**

Once community leaders identify the need for a strategic plan, they must plan to plan. This involves ensuring that everyone in the community understands the concept of strategic planning, agrees on the need to plan, and is committed to the planning process. The leadership group must define the roles of the manager and consultants, identify the key stakeholders, form a planning team, and make everyone aware of both the costs and the benefits of the planning process. Most important, the community must be ready to plan, typically referred to as strategic planning readiness (please see attached paper by Weir and Kobussen for guidance with the readiness work in Appendix 1).

### **Organizing a Planning Team:**

Your strategic planning team should include five to twelve members. Research indicates that groups of five are typically most effective in problem solving, and that groups larger than twelve are often difficult to manage, limiting the ability of each member to contribute. The planning team should include members of all the relevant community stakeholders including, for example, along family lines, with a balance of gender, age, and experience in the community.

It's usually a good idea for the planning team to develop its own mission, complete with a shared set of operational values and beliefs. The mission clarifies the team's purpose. The values highlight what the planning team stands for and how it deals with decision making and problem solving.

The planning team also plays a significant role in helping the community redefine its culture so that it aligns with the vision of the community. A community's culture provides the social context within and through which work is done. In the community setting, the community's culture and history may even define the organizational culture within the community.

### **Creating a Vision and Vision Statement:**

A community (or organizational) **vision** is its longest-term or ultimate set of goals. A vision statement is typically short and inspirational. **One statement that was voiced in the initial LCFN planning session was “Putting LCFN on the Map!”**

For a community-based vision to become reality, it must be shared. Everyone involved in the strategic-planning process must have a common understanding of the future. Otherwise, people will do things with different images in mind, perhaps taking the plan (and community) in unintended directions.

Vision, embodied in the **vision statement**, is the reflection of an communities ideal picture of its future. The LCFN may present its vision of its future in many ways. In the end, the LCFN vision is the picture that its leaders and members keep in mind at all times. It is the image that will guide LCFN’s activities and behaviors, including the way it makes decisions.

The **visionary leader** (the individual(s) with a new view of the future) must communicate his or her vision in a way everyone can understand. He or she must also demonstrate clearly and convincingly why change is necessary.

The visionary leader must not put people off the envisioning process. Community members must be allowed to critically review the vision, asking questions and adding creative thought—without being criticized—at every point. If the vision is not understood and shared by everyone involved in or affected by the changes, the strategic-planning process is doomed to fail.

### **Creating a Mission and Mission Statement:**

A community **mission** clarifies and promotes the way in which the community vision will be realized days, months, and years down the road. The ideal mission answers the question, “Why are we in business?” It portrays purpose and relates to the community and/or organizational values.

The **mission statement** formalizes these ideas in a neat, brief package that’s unique, informative, and motivational. According to Goodstein, Nolan, and Pfeiffer (page 192), “In developing a mission statement, the planning team must answer the following questions: What functions does the community perform? For whom does it perform them? How does it perform them? Why does the community exist?”

Formulation of a mission is often a difficult task. The mission statement, for example, must make all the necessary points in 100 words or less. Contemporary planners suggest that an effective mission statement should be no more than 25 words long! Here are a few guidelines for developing your mission statement:

- Your mission statement should be as brief and complete as possible.
- It should be easily read and understood by you and the members of your community.

- It should be catchy—fun to read and easy to memorize. It can be further refined as a slogan, if necessary.
- It should be unique, differentiating your business from your competition.
- Most important, your mission statement should specify why you exist, whom you serve, what you produce, and how you operate.

**Community Values and the Strategic Values Statement:**

Finally, a strong and agree-upon **statement of community values** must be formalized as these values and associated statements of value will guide planners with decision-making during the planning process. For example, a community may value employment over the creation of wealth, or environmental sustainability over the exploitation of non-renewable resources. In this way, a community can pick and choose between a project that may do irreplaceable damage but make money, in relation to a fairly profitable venture that places concern on renewable resource use and the training and employment of community members.

LCFN values, embodied in a **values statement**, should clarify and highlight those critical beliefs or principles that LCFN leaders and members hold most dear to their heart. These are the principles that should not, in fact will not, be compromised. They are the core statements that will guide LCFN’s every action and day-to-day decisions.

Before meaningful planning can take place, the LCFN’s culture must appreciate and value the need for planning – especially in relation to business and economic development. This means the culture must value group work and promote the sharing of information. The culture must then realign itself with the new vision and strategic plan, for economic change to occur. This may be an initial challenge the strategic planning team may want to tackle.

During the September 10<sup>th</sup> session, an attempt was made to clarify important LCFN community values. These are as follows – LCFN values::

- Work
- Money \$
- Accountability- person to person, face to face
- Input - from members, partners, ourselves,
- Respect
- Trust in relationships
- Being valued
- Environmental integrity
- Sustainability
- Land – Sacred/spiritual sites, community use/needs
- Water (as valued resource re sustainable)
- Relations with the town – example sell water to the town = \$ ED
- Education

- Traditional Indigenous Knowledge (TIK)
- Diverse economic environment
- Inclusion
- Self-sufficiency
- Reputation – one that is strong and positive
- Commitment
- Other communities
- Children (All)
- Community development (affordable housing, etc)
- The animals
- Stories

### **Developing Long-Term Goals, Strategies, and Action:**

Once the strategic planning team has assisted in the development of a SWOT analysis, it then defines and develops its strategic (long-term) goals, strategies and actions (the activities required to realize the long term goal).

NOTE: It is at this point that the LCFN must begin to move from the more general and overarching Values, Vision, and Mission statements, to a clarified future through the preparation and creative development of long-term goals and core strategies. At this point, the LCFN strategic planning team should attempt to develop a prioritized list of long-term goals with associated strategies and actions.

It may help to list 6 or 7 of important LCFN long-term goals. Then, under each goal statement, develop a strategy (and alternative strategy, if required), and attach a list of specific actions that need to be realized if the long-term goal is to be reached.

LCFN's long-term goals are those 3 to 5 year goals that will take it one large step closer to the realization of its idealized economic and business future state of being. These long-term goals do not have to be written in specifics. But if they are not, you need to get specific at the actions level of your project. Your strategies are the ways in which you will attempt to realize your long-term goals and actions. Your strategy is your game plan.

### **Working with External Consultants and Stakeholders:**

Every community needs the assistance of consultants to ensure that its strategic plan is developed and implemented effectively. Consultants may be found inside or outside the community.

Consultants can play several roles, including advocate or champion, stakeholder, trainer, facilitator, coach, content expert, and strategist. The stage the organization has reached in the planning process determines which roles the consultants will assume.

Please read Chapter 4, “Potential Roles of the Consultant” (pages 71–91), in Goodstein, Nolan, and Pfeiffer for a full description of consultant roles in strategic planning.

### **Management, through Monitoring and Evaluation:**

In this final section, we must consider how the LCFN will manage, monitor, and evaluate the implementation of its strategic plan.

To summarize, there are four questions that the LCFN strategic planning group must answer through the development of a strategic plan. The first three are as follows: 1) Where do we want to go? 2) Where are we now? and, 3) How are we going to get there? After which the LCFN should deal specifically with the fourth question: How will it measure its progress?

After the strategic plan has been developed on paper, the plan must be monitored and evaluated once it has been implemented. The LCFN “management” team will need to manage and measure the progress of its strategic plan. This measurement relies upon the development of key success factors (or the clarification of long term goals) and performance indicators. In this way, the management team can collect, analyze and monitor observable and measurable data related to the realization of short-term results. Here, significant deviations from the intended results must be analyzed and evaluated in terms of problem solving, corrective action and/or the re-evaluation of the plan.

It may help, at this point, to imagine that the LCFN is about to embark on its first year of economic revitalization or development are about to start your first year of operation. The community “doors” are open, and you have done everything required to get started.

**KEY STRATEGIC SUCCESS FACTORS:** are simply those things that your community (or business - small or large) measure. For example, you might measure member or employee satisfaction, employee productivity, absenteeism, turnover (especially unwanted turnover), safety, training outcomes, costs, revenues, production, capacity, quality, customer satisfaction, timeliness, accuracy, market share, etc. These factors are then turned into

**PERFORMANCE INDICATORS** by adding goals, objectives and a time frame. So, for example, take the key strategic success factor of COST. There are a number of performance indicators of cost, including total costs, manpower costs, overtime costs, costs of supplies, costs of operations, cost of administration, marketing costs, etc.

## Lake Cowichan First Nation Engagement: Developing the Vision and Mission Statements

Through a community engagement process facilitated by team member and project coordinator Jack Smith, the Lake Cowichan First Nation community members and project team members discussed the importance of developing a community-based “vision statement” as outlined in the section above, and spent a considerable amount of time envisioning a statement that would indeed reflect a shared image of the community moving forward. The vision statement put forward by the community, in addition to being the driving force for the economic strategic plan, is realistic and achievable and conceivably incorporates the overall vision of the Lake Cowichan First Nation. It respects the past, considers the present and defines the future and clarifies the community’s intentions for economic development. After considerable discussion and clarification the vision for economic development for the Lake Cowichan First Nation is: *“To build a solid foundation for our current and future generations to grow and prosper while acknowledging our culture and heritage.”* Furthermore, the community bolstered the vision statement by adopting the following: *“The goal of the Lake Cowichan First Nation is to provide opportunity, employment, and the means to become economically self-sufficient through sustainable economic development. Such development will allow for self dependence and reliance.”*

The Lake Cowichan First Nation community also considered options for its mission statement and after considerable discussion resolved the following as the Lake Cowichan First Nation mission statement, its statement of purpose for economic development, its statement about how it will reach its vision: *“To actively engage in economic development that enhances the quality of life for our community while taking into consideration our cultural and traditional ways.”*

The economic development strategic planning process was described in the section above as an iterative process. As Lake Cowichan First Nation further develops its plans and strategies for economic development further discussions at the community could see the refinement of both its vision and mission statements. For the time being however both provide strong motivation and purpose for the pursuit of its short to long-range economic development aspirations.

The next section provides an overview of potential land and resource based economic development opportunities in and around the Lake Cowichan First Nation that could support the very aspirations contemplated by the vision and mission statements.

## Assessing the Lake Cowichan First Nation Traditional Territory: Land and Resource Based Economic Development Opportunities

As part of the preparatory work for year one and subsequent years of the LCFN 5-Year Economic Development Strategic Plan, team members felt it necessary to conduct a general assessment and overview of land and resource based economic opportunities in the Lake Cowichan First Nation traditional territory. Team member and land and resource expert Tawney Lem provided Lake Cowichan First Nation with a comprehensive review of existing information and data sourced from local community Official Community Plans and selected land and resource studies conducted for treaty purposes, among other studies and sources.

The document cannot be reproduced in its entirety herein nor can it be attached as an appendix because of the sensitivity of some of the sources due to their use in the treaty negotiations process but it stands as a foundational and baseline data review document for the Lake Cowichan First Nation. To provide a flavor of its usefulness for economic development purposes however, portions of the document are replicated below:

### **Assessment Overview**

The Lake Cowichan First Nation is developing an economic development strategy as an action towards meeting the community's economic development vision and mission:

#### ***Economic Development Vision***

*To build a solid foundation for our current and future generations to grow and prosper while acknowledging our culture and heritage.*

*The goal of the LCFN is provide opportunity, employment, and the means to become economically self sufficient through sustainable economic development. Such development will allow for self-dependence and reliance.*

#### ***Economic Development Mission***

*To actively engage in economic development that enhances the quality of life for our community while taking into consideration our cultural and traditional ways.*

To support the economic development strategy, a comprehensive assessment of current land uses was required. Over the past few years, the Hul'qumi'num Treaty Group (HTG) collected a good body of knowledge of land ownership, Crown interests (leases, licences and tenures), potential availability of natural resources (e.g. forest productivity, presence of minerals), and potential constraints to resource

development (e.g. species at risk, terrain). This information was gathered for the whole HTG Statement of Intent (SOI) area, and was housed in numerous volumes and sources ranging from full studies to meeting reports.

To conduct the assessment for the LCFN economic development strategy, the previous work of the HTG was strongly relied upon, while recognizing the limit that some data is now almost a decade old. Resource development opportunities across the SOI area have been considered in this assessment, with particular focus on:

- How opportunities might be capitalized upon if the LCFN was able to acquire ownership over available (candidate) Crown lands within the Cowichan Lake drainage; and
- Given the proportionately small amount of Crown land in the area, subsurface resource opportunities available related to private lands.

In addition to the data collected by the HTG, this assessment also draws upon local and regional government documents such as Official Community Plans, government and non-governmental material on resource management best practices, Multiple Listing Service (MLS) postings for local real estate availability, and various other sources for economic trends.

This assessment is organized into three sections:

1. General land and resource based economic development opportunities
2. Potential development constraints
3. Specific economic development opportunities for key Crown parcels

Based on the Crown land characteristics, the main economic opportunities appear to be market housing, commercial, light industrial and forestry.

The appendices include all maps referenced throughout this assessment. In addition, a separate Photoshop file has been produced that allows for future comparative reference between all map layers.

## **1. General Land and Resource Based Economic Development Opportunities**

Within the HTG territory, numerous economic development opportunities exist related to the direct use (extraction) of natural resources, as well as activities that are non-extractive but rely on the land and natural resources (e.g. interacting with resources, views). Based on the information gathered as part of Hul'qumi'num's treaty process, digitized maps for the whole HTG territory have been created for the following resources:

*Extractive*

- Agriculture
- Aquifers
- Renewable Energy
  - Micro hydro, wind, tidal current
- Subsurface Resources
  - Industrial minerals, metallic minerals, coal and coalbed methane, natural gas, gravel (aggregates)
- Forestry
- Fresh water fishing

*Non-extractive*

- Resort
- Tourism and outdoor recreation

For the purposes of this analysis, only the Vancouver Island land portions of the HTG territory have been assessed with a particular focus on the area around Cowichan Lake.

The maps for the referenced Crown land parcels can be found in Appendix A, and maps for each resource are in Appendix B.

The HTG treaty process also gathered information on urban development (rental and market housing, commercial and industrial). Data was gathered on these land uses, but associated maps were not produced. These land uses are also discussed in this section.

Finally, the HTG information included data for First Nations community development. As this is not an economic land use, community development has not been addressed in this assessment. However, land that is suitable for community lands would similarly be suitable for rental or market housing. Therefore, data related to community development has been incorporated in the urban development section of this report.

...

1	Wildlife management and habitat restoration work
2	Archaeological research, heritage site conservation, cultural resource management
3	Aquaculture (shellfish farming, processing)
4	Forestry
5	Canoeing/kayaking tours, with a cultural focus

6	Nature-based or cultural tourism
7	Urban development (rental housing, commercial, industrial)
8	Commercial harvesting in intertidal areas
9	Farming or agriculture (e.g. berries)
10	Small business for selling marine products
11	Commercial fishing from boats
12	Gathering wild plants to sell (mushrooms, plants for floral)
13	Generating hydro-electric power from rivers or streams
14	Mining-minerals, oil, gas, gravel
15	Guided sport fishing / fishing lodges

This assessment report suggests that items 1 and 2 are not economic development activities. These are conservation activities that likely represent a cost, not the generation of revenue. Items 3 and 8 are relevant to the east coast of Vancouver Island and the Gulf Islands only. Items 5 and 6 are very similar and can be grouped together for the purposes of this assessment. There is low agricultural capability in the Cowichan Lake drainage so item 9 is not a viable option. Items 9 and 10 have limited potential compared to the east coast. Therefore, the shortened list of priority economic development activities for the Cowichan Lake drainage is:

1	Forestry
2	Nature-based tourism/activities or cultural tourism
3	Urban development (rental housing, commercial, industrial)
4	Gathering wild plants to sell (mushrooms, plants for floral)
5	Generating hydro-electric power from rivers or streams
5	Mining-minerals, oil, gas, gravel
6	Guided sport fishing / fishing lodges

This list should be viewed as the priorities comparative to other opportunities. While the list is numbered, the numbering itself does not suggest that, as an example, forestry is a higher priority than guided sport fishing. Community interest, available resources, and specific feasibility analyses need to be considered in order to create a hierarchical list of economic development priorities for the LCFN.

The excerpts from the study above provide a glimpse into Lake Cowichan First Nations overview of potential land and resource based economic activities. As LCFN seeks out opportunities into these economic sectors further review and feasibility studies will need to be conducted to assess priorities and potential. This will remain an action item throughout the 5-Year Economic Development Strategic Plan that will commence more vigorously in year two.

## Lake Cowichan First Nation Engagement: Corporate Structure Planning

Another aspect of community economic development that the community and project team were interested in hearing about was information related to financial and corporate structure planning. Team member Ross Harder, a practicing CMA, presented an informational session on the different types of business models, including sole proprietorships, partnerships, societies, registered charities, corporations and limited partnerships. Community members in attendance also learned how these various businesses could be structured to enhance business and economic development initiatives. Although this was not information that could be implemented at this point in the Lake Cowichan First Nation Development Plan it was useful for informing and alerting community members to the machinations and potential complexities of business planning, which is an integral part of economic development. Ross Harder's presentation is attached as Appendix B to this plan.

## The Lake Cowichan First Nation Engagement Sessions: A Summary

The result of this presentation, along with the envisioning exercise leading to the mission and vision statements, the community sessions on planning, and the review of land and resource use in its traditional territory, and the ongoing meetings related to economic development planning by the community team all provided several opportunities for community-based engagement in the development the first phases of the Lake Cowichan First Nation 5-Year Economic Development Strategic Plan. In "learning to plan" the community gained greater insights into the overall process of economic development. Perhaps the most notable aspect of this is that length of time that planning to plan and then planning itself, takes. This is particularly so in the community-based planning process. To complete the economic development planning process however the community and the project team will now need to turn their attention to the development of long term goals, strategies, and actions; and to the creation of short term goals and performance indicators.

This has been discussed to some extent by the project team and community members in various meetings and engagement sessions but will need to be developed further in year two of the five-year process.

The following section will provide an overview and preliminary analysis of the long-term objectives that follows from an assessment of discussions to date.

## Lake Cowichan First Nation Economic Development Strategic Plan: Long-Term Goals, Strategies, Actions, and Performance Indicators

The focus of Lake Cowichan First Nation's community-based economic development work to date has been on the phases of the plan described above. The short and long-term objectives, strategies, and action items can however be extrapolated from a review and analysis of the results of the several workshops and community sessions and meetings. A summary list of these objectives is listed below with the proviso that the list and the strategies and action items supporting the list will be more actively worked on and developed by the community early in year two of the plan.

Four key objectives – cornerstones for the Lake Cowichan First Nation economic development plan – were discussed. They are:

- **Objective One: Put Lake Cowichan First Nation on the map by establishing an effective and sustainable economic development program for the community.**
  - Strategy -To reach objective one discussions centered around 3 key strategies:
    - Strengthen the economic development function for the Lake Cowichan First Nation
    - Position economic development as a high level visible component of the community
    - Provide ongoing community education on economic development within and around the community
  - Action Items - These action items will assist in implementing the strategies:
    - Retain an economic development officer
    - Conduct a best practices review
    - Review the current economic development structure
    - Develop an economic development manual for staff and chief and council
    - Provide ongoing economic development professional opportunities and training for staff and governance
    - Consider establishing an economic development committee composed of specific professional and sector based expertise
    - Meet with key local and regional representatives from government, industry, and business
    - Promote economic development in the community by identifying and generating ways of doing that
  - Performance Indicators – Checklist to review progress on the action items:
    - P/T or F/T economic development officer in place

- Best practices review completed
  - Current economic development structure reviewed with recommendations
  - Policy and procedures manuals reviewed and updated
  - If committee established ensure that roles are defined
  - Committee has sector and professional expertise representation
  - Committee is adequately supported
  - Regarding visibility: increased support garnered from government, industry, and business
  - Increased and ongoing support from Chief and Council
  - Increased social media presence
  - Increased traditional media presence
  - Increased community support
  
- Objective Two: Put Lake Cowichan First Nation on the map by creating a business development program to ensure that a favourable policy and environment to business development exists in the Lake Cowichan First Nation community.
  - Strategy – To reach objective two community and team member discussions focused upon two main strategies:
    - Establish a regulatory and policy environment with processes and competitive costs that will attract business
    - Encourage entrepreneurship and business start up
  
  - Action Items – These action items will assist in realizing the strategies:
    - Complete a review of best practices for structuring internal processes and costs for potential business development approval.
    - Review current of internal and institutional (AANDC) practices with respect to business planning and approval
    - Develop a fast track process to encourage business start up
    - Develop a business development support manual/website for businesses wanting to do business with Lake Cowichan First Nation business entities
    - Seek support from training and employment (i.e., CSETS et. al.) providers to prepare labour force. Consider this as an asset as availability, quality, and affordability are all key factors in attracting business.
  
  - Performance Indicators – checklist to review progress on the action items:
    - Review of best practices completed

- Internal and institutional practices reviewed with recommendations
  - Fast track process investigated and established
  - Business development support manual/website/link developed
  - Training and employment providers contacted and support garnered
- Objective Three: Put the Lake Cowichan First Nation on the map by establishing Lake Cowichan First Nation as a place to invest.
  - Strategy – to reach objective three team and community members discussed 2 main strategies:
    - Create an image of the Lake Cowichan First Nation as a friendly place within which to conduct business
    - Create a competitive advantage by improving business readiness
  - Action Items – the action items will assist in fulfilling the strategies:
    - Conduct a review or assessment to determine the state of Lake Cowichan First Nation business/investment readiness attributes
    - Conduct a review of best practices for business readiness in local communities and other First Nations
    - Create a marketing profile
  - Performance Indicators – checklist to review progress on the action items:
    - Number of leads for new business development
    - Increased support from local and regional business community
    - Number of jobs created
    - Business/Investment readiness report completed
    - Best practice report concluded
    - Marketing profile developed for distribution
- Objective Four: Put Lake Cowichan First Nation on the map by establishing the Lake Cowichan First Nation community image as a destination for opportunities.
  - Strategy – to reach objective four team members and community members discussed 4 possible strategies:
    - Create a dynamic web/media presence for economic development as a unique site (separate from the general community website)
    - Direct marketing efforts at targeted industry or business that fits within Lake Cowichan First Nations values statement

- Enhance partnerships with regional, provincial, and national partners
- Strengthen relationships with local government and local business community
- Action Items – to assist with the fulfillment of the strategies:
  - Create a website committee
  - Hire a website designer to work with the committee
  - Maintain and update the website
  - Expand investment attraction reach
  - Direct target marketing
  - Design and create marketing materials to target industry/business
  - Introduce EDO to governments and other partners
  - Obtain membership in economic development associations
  - Attend economic development conferences
  - Meet regularly with local government representatives and local business leaders
- Performance Indicators – checklist to review progress on the action items:
  - New website developed
  - Number of hits to the website
  - Increased leads
  - Number of leads for new business development
  - Membership in economic development associations
  - Participation in conferences attended and networking activities
  - Numbered of projects/ventures partnered on
  - Number of meetings with local, regional, provincial, and federal governments
  - Number of programs shared with local government and business
  - Partnerships shared with neighbouring communities
  - Increased support for Chief and Council from outside agencies and government and business

### Next Steps and Conclusion

This summary list of objectives, strategies, action items, and performance indicators is but a preliminary investigation into the work completed to date and the work yet to be done by the Lake Cowichan First Nation in solidifying its 5-Year Economic Development Strategic Plan. The next step for the Lake Cowichan First Nation community and the economic development technical team members is to conduct an implementation plan for the realization of the elements discussed above. That would necessarily entail developing timelines for their achievement. Many of the

action items are achievable within year two of the 5-year planning cycle and certainly within the 5-year economic develop strategic plan window. This work will continue this fiscal year with the implementation plan to be completed by the end of the first quarter. Full implementation can then begin in the second quarter.

Another next step for the Lake Cowichan First Nation to complete this fiscal year is a full economic base modeling and analysis for the Lake Cowichan First Nation traditional territory. This will provide for in depth information upon which the Lake Cowichan First Nation and its Chief and Council can make informed economic and business decisions.

As a final note on next steps, and once the economic analysis is complete, the Lake Cowichan First Nation will undertake an exercise in priority identification of business development opportunities to initiate feasible studies where that is appropriate.

In conclusion the Lake Cowichan First Nation has embarked upon an ambitious journey to put the Lake Cowichan First Nation on the map. The community has discovered that the journey has many steps and that some steps have already taken longer to go through than anticipated. Those steps were necessary for enlightenment and the community can now look forward to more concrete planning and to implementation of their economic dreams and plans. Year two will initiate the implementation phases and the results of all the hard planning work will bear fruit for the community to witness. Years three, four, and five will concretize year one and two economic development work. This is iterative work and the work done in year one will be revisited and the lessons learned, including planning to plan, will be one that will be repeated. The Lake Cowichan First Nation now has the tools to work with in that regard and can now look forward to subsequent years with the confidence that having a plan in place can bring.