PUTTING IT ALL TOGETHER

The planning process
Using the planning process to develop a plan to maximize the unique conditions of the jurisdiction.
It’s a process – not a recipe.
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THE OVERVIEW
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“You can’t solve a problem with the same mind that created it.”

(Albert Einstein)

“When you change the way you look at things, the things you look at change.”

(Dr. Wayne Dwyer)
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INTRODUCTION

At the beginning of 2011, an industry association serving the international content creation sector asked if I would share my economic development philosophies and techniques in a master class with its members. Always up for a challenge, I agreed and embarked on a five-month focus to prepare a textbook, manual, and appendices to help the membership look at ways to strengthen their regional economies. In June of 2011, I presented the first class in Los Angeles California (USA) to attendees representing jurisdictions across North America, South America, and the Middle East. These materials were so well received that the master class was repeated in Paris, France in September 2011. The next logical step for these materials is to share them with everyone.

The methodologies and techniques presented in these materials come from my 22+ as a content creator of long and short form projects for audiences in North America, Asia, and the UK.

It was during that career, I discovered my talent for distinguishing between fleeting trend and long-term business solutions. Matching this talent with my deep understanding of business in today’s digital and nomadic talent economy, I now lead teams to evaluate and devise strategies and tactics to enhance economic capacity for public and private entities, by leveraging their unique conditions. The broad results solve problems and reinvigorate revenues by consistently embracing emerging technologies and blending traditional techniques that satisfy stakeholders and capture market share in audience-driven industries. A few specific results include:

- Working with the province of British Columbia to use my personal, in-depth knowledge about digital products and services, interactive development, and multimedia to research marketability and commercialization of technology, recommend demonstration projects, and investment.
- As advisor to the Campbell River Creative Industries Council, I provided the framework for a digital media incubator, cross-pollinating aboriginal themes with game development, animation, and digital media projects for this regional, Vancouver Island municipality. The council launched in June 2010.
- Contributed to the activities that attracted three (and counting) internationally renowned visual effects and animation companies to Vancouver, British Columbia, Canada between 2007 and 2010, and, support for the activities that brought the prestigious North American SIGGRAPH 2011 conference to Vancouver, British Columbia, Canada in August 2011.

Success with many private sector clients in a variety of sectors, demonstrates the transferability of the methodologies and techniques. Although these materials are framed in the content creation sector, they are adaptable and applicable to multiple sectors.

The format for each chapter includes the relevant sections of the textbook and workbook, as well as additional resources, reading lists, and cited templates.

As we go through the chapters, I invite you to take whatever information resonates with you and hold it as your own, and to toss out whatever doesn’t resonate. Some themes may feel like a review – and this may be true. You already hold a lot of knowledge, but perhaps need to change the way you are looking at it to find the best solutions for your specific jurisdiction. Results will vary depending upon how you work with stakeholders and the uniqueness of your situation.
CHAPTER SUMMARIES

This recent iteration of the materials merges the information provided in the text and workbook, and breaks down into six chapters.

- The first chapter, “Stakeholder Relations,” examines how to navigate the multiple relationships and agendas that are the stakeholder groups and identified as:
  - “Our Allegiance:” The municipal, state, provincial and/or federal levels of government directly funding the film office; when we are clear about what these entities want in exchange for funding, we are able to communicate value in a language they understand.
  - “Our Alliances:” The unions, industry associations, and studios with needs that seem at odds with the goals of our allegiance, and at times, at odds with each other. When we understand those differences, we identify opportunities.
  - “Our Partners:” The peer-to-peer levels of government like Tourism, the jurisdiction as the community at large, including aboriginal groups and the educational and training institutions that share goals similar to the Film Office. When we communicate with our partners, we avoid duplicating activities as well as engaging in conflicting activities.

The next four chapters are the activities of “Economic Development:”

- If there is one gem take away idea from this text, it is “Measure and Track.” Know what the jurisdiction has to offer, what business is done in the jurisdiction, how much, why it comes, why it doesn’t come, helps us align, clarify, and verify our economic potential and becomes the foundation of our decisions about direction, strategy, and activities.

- “Financing and Incentives” is a review of the types of private and public finance mechanisms. Money is a levering tool. When we coordinate the use of money with the unique conditions of the jurisdiction, we create a lever to accelerate economic growth – in the jurisdiction, rather than outside of the jurisdiction.

- “Marketing and Communications Planning” is a primer for branding, marketing, advertising, and communications, crisis, and risk mitigation and management.

- “Business, Workforce and Skills Development,” are concurrent activities, when done jointly, these activities contribute to stable, sustainable wealth creation in the jurisdiction.

- We’ll put all these elements together in the final chapter, appropriately titled “Putting it all together,” the planning process.
**COMMON THEME**

To place the methodologies and techniques in context, I’ve wrapped them in a common theme.

No matter where you are in the planning cycle, think about wrapping your thoughts, responses, and activities around align, clarify, verify, and then do. Like the pyramid on this page illustrates, ALIGN takes the most amount of energy, finesse, and time.

**Align**

In the context of working the planning process, we align three activities:

1. Relationships with stakeholders, to ensure we’re working towards either a common end goal, or, that our goals are complementary, and will not hinder any party from achieving their respective end goals.
2. Perception with reality. We do this by collecting information - inventory the assets - to gain a clear picture of what is going on in the jurisdiction. This helps us make those good decisions about the appropriate next steps to achieve the end goal.
3. The plan or project with the action steps. Once everyone is on board and we have the data to support our decisions, it’s a matter of developing the plan to move the project forward towards the end goal.

**Clarify**

We seek clarification at several points during the process to ensure stakeholders' needs and expectations, the jurisdiction's assets, and the project or plan for economic growth are aligned to implement the best solution at this time.

**Verify**

Verify is all about communicating to verify that those needs, expectations, and assets are the relevant focus. If not, then we take time to amend, or find another solution before it becomes a critical impediment to the project or plan.

**Do**

As the verb implies, this is the action phase, but, "DO" is not the final phase. Action is the sum of the needs, expectations, and assets aligned to commitments by stakeholders to move the project or plan forward. "DO" diligence throughout the planning, implementation, and maintenance phases

Let’s get started.
THE PLANNING PROCESS

It’s time to roll up all of the information we’ve read so far, and take the details that are unique to our respective jurisdictions to design our respective growth plans.

The steps we use to create our respective plans are universal – very common. However, the results are not, because we tailor our plan based on the unique conditions of our respective jurisdictions.
REVIEW
Before we begin exploring the planning process, let’s briefly review where we’ve been: “Stakeholder Relations” helped us identify our relationships with our allegiance, alliances, and partners, and, to see those relationships as assets, with our strongest and most valuable asset being ourselves. We also identified time and energy as fundamental resources that we control.

We came to understand that our relationships are a blend of adversarial and supportive, depending upon the agendas of our allegiance, alliances, and partners, and, whether or not they perceive their respective agendas are threatened or protected.

We understand that the role of the Film Commissioner is to lead process among our allegiance, alliances, and partners – and not to do all the activities on our own. We know that active participation in the process leads to engagement and ownership that directly affects the outcome. We collaborate with our allegiance, alliances, and partners; their respective contributions indicate their level of commitment to the process, and to the goal.

“Economic Development” focused on the tools we use to assess activity, and, conditions that increase capacity for businesses and skilled professionals within the jurisdiction. We understand that we:

- measure to verify the current activity, to help us make appropriate decisions
- track to determine:
  - the amount of activity,
  - the effectiveness of our business and talent attraction initiatives, and,
  - our progress towards our goal, and,
  - to verify our decisions
- are aware of various finance vehicles and incentive programs currently in use around the world,
- understand the brand promise of the jurisdiction, and how to articulate and maintain it, and,
- attract, retain, and cultivate businesses and skilled professionals by leveraging the business cycle.

THE PLANNING PROCESS
This section will help us, our allegiance, alliances and partners collectively develop the goal, based on what we (collectively) know about the jurisdiction. In this section, we will apply our knowledge to:

- identify the ultimate goal, and the action steps to get us there
- re-imagine and redevelop tax incentive packages to
  - attract foreign business and cultivate domestic business
  - increase workforce capacity
  - align skills training
- identify contributions to and by community
- measure, track and respond to results
Have you noticed...?
Since the beginning of this textbook, we’ve only been doing three things with information:

1) Acquiring information,
2) Using that same information over and over again in different ways, and,
3) Validating: tracking and comparing that information each time we look at.

The only NEW information we learned was about the process. Simply put: You already know everything you need to know, all we’re doing is wrapping what you already know in a context – a process. Like the process to measure and track, we have a considerable amount of experience with planning.

When we saved for a special purchase, whether it was a new bike or a down payment on a home, we made a plan. The plan gives action to our intention. The plan focused our actions and decisions about saving money to get to a goal. That’s all a plan does – it focuses our intention into action. Before we understood our intention, something motivated us to have that special purchase; that motivation triggered our desire to save, and that’s how our intention came into being.

Once we identified our desire, we began to figure out how to get save the money to get the purchase. If we were not clear about our intention – what we wanted to happen, and what we wanted to do – we would fail to meet our goal because we would not know what to do. The same is true with planning growth for the jurisdiction. Our motivation triggers the desire, the desire sparks our intention; it is at that moment that we seriously look at planning to get what we want.

Why do we plan?
A Plan helps us focus our decisions and our actions. The plan is a set of guidelines that help us decide:

- what to focus on versus what is distraction,
- specific tasks and specific dates for completion,
- how to use information to determine progress, and,
- to let us know we’ve reached the goal.

Understanding the planning process
We know that a plan helps us focus our decisions and our actions with a set of guidelines to identify:

- what to focus on versus what is distraction,
- specific tasks and specific dates for completion,
- how to use information to determine progress, and,
- when we’ve reached the goal.

We also know that although there aren’t different planning processes, there are different plans depending upon the unique assets, resources and conditions that help us take advantage of opportunities.

STRATEGIC PLANNING
We hear people refer to plans as “strategic,” that they are developing a strategic plan, or they are engaged in strategic planning.
Putting it all together
The planning process

Strategic describes future oriented thoughts, plans and actions – what may happen in the future – also termed “response” and “responsive.”

- When we “think strategically,” we think about how we can influence our future.
- When we “plan strategically,” we layout a set of the steps we will take to affect our future.
- When we “act strategically,” we are mindful about the decisions we make and act with full knowledge of how that action affects our future.

Let’s think about a plan to save for a house. Let’s say we came across an exceptional deal on a flat screen TV. When we decided not to purchase the big screen TV and stuck to our savings plan instead, we took into consideration the impact this purchase would have on our future – we made a strategic decision.

OPERATIONAL PLANNING

Operational describes present oriented thoughts, plans and actions that are present focused – what is happening – right now, also termed “reaction” and “reactive.”

- When we “think operationally,” we think about what to do right now about real time situations.
- When we “plan operationally,” we figure out what to do about what is happening right now.
- When we “act operationally,” we make decisions that react to current real time situations.

Let’s say we decided to purchase the flat screen TV. We may have justified it as a strategic decision, because it will look great in the living room of the new house; but this decision affected the timeline for purchasing our new home; by the time we have the home, our TV will be out of date. We reacted to a real time situation - we made an operational decision.

When done well, the plan guides us forward towards the future goal, while reminding us to be mindful of the present to take advantage of those surprise opportunities, and to swerve around those unpredictable threats by making adjustments day-to-day, week-to-week, month to month and/ or year to year.

When we think about the future of the jurisdiction, what do we see? Is there an opportunity to make what we see a reality or is it pure fantasy? What do we do with this vision?

This vision is our motivation.

Since we do not work in isolation, we need to find out if our allegiance, alliances, and partners feel the same way about the jurisdiction. Do they also believe that the jurisdiction can realistically become something greater than it is right now?

At this time, we may choose to host a roundtable – a formal meeting of industry, community, and government decision makers to discuss this vision in detail. The result of the roundtable is to gain agreement from these decision makers regarding a vision for growth – but not necessarily our original vision. A new vision may grow from the roundtable meeting. Once our allegiance, alliances, and partners agree, we are ready to begin the formal planning session.

For now, our vision is nothing more than our own suspicion; a roundtable at this time would be premature. What we need is verification. What we need is either a formal baseline measure or an investigation.
The first action we take regarding our vision is to engage our direct report – our boss, and ask her/him what s/he thinks about the direction of the jurisdiction.

**What’s the best way?**

Have a face-to-face conversation with an information note for reference.

Throughout the master class chapters we have used the information note to help communicate with our direct reports.

**Why?**

- The information note provides an overview of our intentions with enough detail to make a decision.
- The information note is a respectful form of communication that helps us strengthen our working relationship with our direct report.

When we see our intentions in print, we have the ability to review, verify, and adjust to clarify the intention. So once again, the information note summarizes answers to the following questions, using a maximum of three lines per question: *(APPENDIX: INFORMATION NOTE)*

1. **What is the intention?**
   a. why are we doing this?
   b. What do we expect our boss to do?
      i. Aside from making a decision regarding the investigation, we may ask to present the results to the alliances and partners during a roundtable event.
      ii. Depending upon the results of that roundtable will determine whether to proceed with the baseline measure.

2. **Why it is important?**
   a. from the government’s point of view, identify potential gains to:
      i. determine whether or not there is sufficient potential for industry growth to make significant contributions to tax revenues, generate sustainable employment, and attract new businesses to ensure the economic health of the jurisdiction.
      ii. ballpark capacity - how much activity, how many businesses, how many skilled professionals are in the jurisdiction, to establish where to focus our growth strategies.
      iii. provide an active government presence by connecting with potential alliances and partners to:
         1) assess their respective tolerance for a planning exercise,
         2) assess their respective beliefs about what they think is happening in the jurisdiction, and,
         3) demonstrate our commitment to collaboration.
b. estimate costs:
   i. The cost of the investigation is zero plus our time; or minimal outside expenses plus our time. (Or costs related to the baseline measure, if this action is chosen)
   ii. The cost of the roundtable is (meeting room rate + catering for xx people x one day)
   iii. The cost of the baseline measure: If there isn’t money for this baseline, then propose a cost share: our allegiance, alliances, and partners pool a percentage.

3. Who might support this intention?
   a. List local industry and community members we are planning to connect with.

4. How we intend to proceed with the investigation?
   a. Direct contact through in person or distance communication.
   b. provide a list of questions in an appendix to the briefing note.

5. When we intend to begin and end the investigation process?
   a. Timeline

6. When do we expect to deliver these results to our boss?
   a. Identify a date within two months of beginning the investigation (or baseline measure)
   b. Make sure to ourselves enough time to perform the investigation (or baseline measure) and prepare the follow up document

7. What do we expect our boss to do with this information?
   This links up with point #1, and brings the document to full circle.
   a. Make a decision on whether or not to proceed with the investigation process.
      i. We will make two conclusions, one if the decision is “No,” and the other if the decision is “Yes.”
      ii. A proposed “decision required by” date.
   b. Postpone the decision about the roundtable until we share the results of the investigation with our direct report.
   c. Postpone the decision about the baseline measure until the roundtable.

As we learned in the “Stakeholder Relations” our allegiance’s response to the note will be one of the following:
   a. Need more information before a decision can be reached
   b. Good idea, green light
   c. No. (not a good use of time, not now... etc)

Our reply to a, b, or c is to:
   a. determine what additional information is required to make the decision, and then amend the note accordingly, or
   b. proceed with the investigation, or
   c. gently ask probing questions to figure out what this really means. “Not now or not ever?”
Let’s assume that the decision is “Yes, proceed with the investigation, and propose a baseline measure, if needed, at the end of the roundtable.

Whether the investigation is our first meeting with our potential alliances and potential partners or whether we have regular contact. It is important to keep an open mind about the information we are receiving.

When we galvanize our allegiance, alliances, and partners – we call them the “team.” If we have come this far and we don’t have a sense of who is on our team – we go back to the section on “The Players.” We look for the gap in relationships. Did we misread one or more of the agendas? Is the vision we proposed not grounded in reality?

For now, let’s assume we verified a lot of assumptions and gathered a willing team that wants to move forward. We report this result to our immediate or direct report, who gives us the green light to host the roundtable.

THE ROUNDTABLE
Sharing our result and laying the groundwork for planning

Let’s review our activities so far:

I. We wanted to verify a hunch we had about growth for the jurisdiction,

II. Although we didn’t share this hunch with our direct report, we did provide enough information for our boss to decide whether an investigation would be a good use of time and resources.

III. We connected with potential alliances and partners to get their input on questions we had about the jurisdiction.

IV. We compiled and reviewed this information and informally compared it to our own thoughts about jurisdiction.

V. We shared the compiled information with our direct report - but not our vision; and asked for a decision on hosting the roundtable.

VI. We received a green light to proceed with organizing the roundtable.

The roundtable is the first time our allegiance, alliances, and partners get together. For this reason, scheduling the roundtable as a full day, rather than a half day will provide an opportunity for these groups to begin to build their respective relationships. (APPENDIX THE ROUNDTABLE)

The purpose of the round table is to:

• provide the opportunity for our allegiance, alliances and partners to meet
• present the results of the informal investigation
• authenticate the input of our alliances and partners
• decide whether to instigate the formal baseline study or whether the group feels they have sufficient accurate details to move ahead with the planning phase
• commit to funding the baseline
• agree upon the growth goal(s)
• assign members to a work group to oversee the baseline activity, and develop the growth plan
• determine a timeline for the workgroup (no more than eight weeks, including the baseline)

This last bullet points is time specific.
Depending upon our respective circumstances, the timeline can be lengthened or shorten. However, activating the plan as soon as agreement is reached is preferable.

Our allegiance, alliances, and partners are fully engaged at this time. Their engagement motivates them to complete the baseline or investigation with as much accurate detail as possible.

However, there are many reasons why our allegiance, alliances, and partners may not want – or feel they don’t need – a formal baseline measure:

- They don’t feel there is enough activity in the jurisdiction; a “tick on a piece of paper” will do,
- Alliances and/or partners have a study that they feel is still accurate, and/or representative of the activity in the jurisdiction,
- They agree that the informal investigation is “good enough,” so why incur the expense of duplicating the activity, and so on.

Knowing when and what to let go of is an important characteristic of collaboration. If the response to implementing a baseline is overwhelmingly negative, or if alliances and partners agree ONLY if the government pays for the measure, then we let go of the baseline – for now. There will be a future opportunity that will make a baseline necessary.

We still have the information collected during the investigation, we have some numbers, we have some verification, and we have our personal observations of the jurisdiction to help us determine fact from fiction. So let’s proceed.

During the roundtable, we will listen for:

- additional feedback and response to the results of the investigation,
- a unified thought about the future of the jurisdiction, and,
- comments that appear to be in disagreement with discussions.

These three details combined with the results of the investigation begin to expose the goal. If this goal resembles our initial vision – our hunch about the jurisdiction, then reveal that vision in the form of a question. Phrasing it as a question helps others (and ourselves) digest information more effectively than being told.

**IDENTIFYING THE GOAL**

So let’s assume that our allegiance, alliances, and partners:

- share the same beliefs about the jurisdiction and speak the same style of language,
- agree with the results of informal investigation,
- stand by their respective input into the investigation, but
- have decided to forgo the formal baseline, instead use the information gathered in the investigation to formulate the goal.
This roundtable is the right time, and the best opportunity for our allegiance, alliances, and partners to identify the growth goal. We know that **the goals are 100% absolutely approved by those who govern us.**

Unlike our individual investigation and plan to save money for a special purchase, the role of the Film Commissioner has many masters. Most of us are directly or indirectly attached to a government body – “those who govern us,” are our allegiance, alliances, and partners. We need the input of most of these groups to identify the goal(s.)

The types of goal we identify are:

1. a long term goal, “the big hairy goal,” also defined as the ultimate destination if neither time nor money mattered, and,
2. a short term goal, the realistic what we want to achieve in the next fiscal year, and perhaps the fiscal year after that.

The long-term goal captures our respective imaginations, and provides that reason d’être - the reason we do what we do. The reason d’être gives us the reason to continue when we are knee deep in making the short-term goal happen. The short-term goal is a stepping-stone to the long-term goal. It is the single step that beings the journey. We design action steps to achieve the short-term goal(s.) It is those action steps; those tasks; that engage us and confirm our movement towards the long-term goal.

We identify only one long-term goal and one short-term goal to be clear about “why we are doing this,” so we can be clear about the decisions and actions we need to take to achieve the short-term goal, and ultimately, and in time, the long-term goal.

Before we attach ourselves to these goals, they need to pass a litmus test. We are more concerned about the realistic opportunity of the short-term goal to meet our expectations for current results.

We test the validity provides the answer to the questions:

1) Why are we doing this
2) What result are we hoping to gain by doing this?

The easy answer is “to better our jurisdiction.” However, that isn’t clear enough. We need specifics to act on. So we continue:

- Is it to increase film production, local, foreign? A little of either?
- Why do we want to increase film production? (Or is it digital production? Or Wireless?)
- What specific benefit and/or affect will this have on the jurisdiction?
- How will increasing this one activity increase the quality of life within the jurisdiction?
- How does increasing this one activity build a sustainable industry?
- How does increasing this one activity affect other industries in the jurisdiction?
- What is the price of this decision? (there’s monetary and there’s lifestyle/community)
- Is there a realistic opportunity to achieve this and reap realistic gains in a realistic amount of time?
- What makes us believe this is true?
- Do we have some capacity in the jurisdiction?
When we look at the realistic potential, we may discover that we don’t have the opportunities we thought we had to “become a booming film centre,” but perhaps we do have an opportunity to become a booming digital media and/or post production hub; or an outsource for game development. It is better to clarify the reality and the direction during the roundtable, than dedicate resources and efforts to tasks and activities that don’t meet our expectations for results.

The roundtable ends in failure if the goals are not realistic, or if there isn’t an agreement about the goals. If this happens, then somehow in the collection process, we missed information, or there is extremely inaccurate information or we misread an agenda or two. When this happens, we lose some of the value we worked so hard to create; and that loss compounds quickly.

Attempting to develop a growth plan without an agreed upon goal won’t work because without the engagement and support of our allegiance, alliances or partners, the plan will be disconnected from the jurisdiction. It won’t fly.

We can avoid the roundtable ending poorly by interjecting as soon we feel the roundtable is off track: “Am I sensing that some information may not be accurate?” “Are we attempting to identify the goal too soon?” Never be afraid to speak up, it’s so much easier to ask about a potential problem or a problem at the onset, than leaving it fester into something larger and nastier.

When we get to our (collective) motivation, the reason why we want to do this we get to the heart of ownership and engagement among our allegiance, alliances and partners – regardless of their hidden agendas; their ulterior motives (to keep their jobs, to keep their businesses, to not have to move for work, etc.) We are ready to assign the work group.

The criteria for choosing the work group are people who:

- will do what they promise to do. We know these people by their reputations,
- have a good understanding of the industry, government, alliances, and partners, and,
- have the time to make this happen.

The last point is the most critical. Some people attending the roundtable may volunteer, but not really have the time to participate. This is why we tell the attendees exactly what the timeline is and how much time they need to set aside for the workgroup.

Earlier we established the timeline for developing and delivering the plan as no more than eight weeks from the day of the roundtable. This may seem ambitious, however, if the roundtable has:

- successfully align our allegiance, alliances and partners, who agree with the results of informal investigation, and,
- stand by their respective input into the investigation, even though they have decided to forgo the formal baseline, instead use the information gathered in the investigation to formulate the goal(s,) and,
- they have identified and agreed upon the goal(s.)

Then the workgroup’s time line is do-able. The workgroup will require only one full day to design and develop the plan. One full day to present the plan at a second roundtable, and up to two additional full days if there are revisions to the plan and if there is a third roundtable to re-present the plan.
Once our allegiance, alliances, and partners agree to the plan, the workgroup implements the plan the next day. The workgroup becomes the oversight group to ensure our allegiance, alliances and partners complete the tasks as agreed. This requires work group members to check progress of tasks once a week – by phone or email; and to present that progress to the work group about once a week or once every two weeks.

The ambitious timeline demonstrates our commitment to the goal and then to the plan. Each time we follow through, we build confidence and trust. In addition, agreeing on the goal, assigning the workgroup and booking the next round table:

- gives our alliances and partners (and our allegiance) a sense of accountability about their respective recommendations,
- as well as demonstrating their level of commitment

**DESIGNING THE PLAN**

So far we have:

- contacted our allegiance, alliances and partners, to inventory of assets
- either completed a baseline measure of the jurisdiction or used the informal inventory,
- agreed upon a goal, and,
- assigned the work group to develop the plan.

Now we are ready to design the plan. This is a one-day event involving only the assigned workgroup.

While it is recommended that a third party be contracted to guide the planning process, the workgroup can proceed on its own provided they elect a facilitator – one person from the group to guide the planning process and another to record – take detailed notes.

Remember the process is present-future focused. Our plan isn’t only for the next 12 months, or even the next 12 years; our plan is a long term vision, broken out into steps that occur over 12 months – until we reach the long term vision. What we do today, tomorrow, next month and next year determines whether we reach the long-term vision, how long it takes to get there.

We are following the same planning process we followed when we saved for that special purchase. Only the assets, resources, and conditions to identify opportunity differ.

We already know the goal because we identified it and agreed upon it during the roundtable. It is now up to the workgroup to design the plan. The collective “we” identified and agreed to the goal(s) during the roundtable.
Next:

1) Devise a set of objectives; outcomes to achieve in a specified timeframe.
2) Develop action steps: a specific set of tasks, and/or activities that meet the objectives and move us towards the goal:
   a. What are we doing?
   b. How are we executing step?s
   c. Who is responsible for which tasks?
   d. How we will report progress on the tasks?
   e. How will we brand, and advertise the jurisdiction?
   f. How we look for new opportunities? (Marketing.)
   g. How will we communicate internally and externally?
   h. Develop the contingency plan in the event that the plan doesn’t do what we thought it would.
   i. Develop the risk management and crisis communication plans, in the unlikely event, of an unlikely event.
3) calculate a budget; how much money is needed to accomplish the tasks and activities, and,
4) assess progress, which is another word for track progress.

Let’s examine each of these parts:

1) **OBJECTIVES**
Objectives specify the measurable achievements over a timeframe. The objectives set up the criteria for the measure. The objectives set our milestones. “X” will happen by “Y” date.

Objectives also confirm the appropriateness of the goal. It is possible that during the objectives process the work group discovers that the direction decided upon isn’t realistic. This is a potential setback for any planner.

So what do we do if the plan isn’t working or we discover a flaw?
If this discovery happens during our planning process, stop, re-evaluate, and rally the workgroup. Chances are that the original plan is too influenced by anecdotal evidence. Investigate and check the baseline measure. If this happens once the plan is implemented, once again, stop, re-evaluate, adjust, and re-implement.

In an ideal world, we would create one plan that would last a lifetime – but the real world isn’t like this, the real world changes constantly and plans need to react to those changes in a methodical manner. That’s why our mission is static and our action steps are fluid. The mission anchors the plan in a direction that is suitable for the jurisdiction, while the action steps get us to the goal... that may not be in a straight line; and it rarely is.

But let’s assume that our goal aligns with our planning process, and continue.
Typical questions our objectives strive to answer include:

Our Allegiance, alliances, and partners:

- Who will be accountable for determining progress and how will this person be accountable?
- What information do we need, from whom and in what form?

Manage expectations:

- How will this result improve business activity within the jurisdiction?
- How will this activity then improve the community, environment, and culture of the jurisdiction?
- How will we determine attrition, retention, improvements to culture, environment, economy, etc?
- Who, how and what is determined as an “acceptable” improvement?

Measure and track:

- How will we (collective) know when this objective is accomplished?
- How frequently do we need to access the progress?
- How will we assess?

Brand, market, and advertise:

- How will we (FC Office) prove results to others?
- How will we (FC Office) communicate this accomplishment?

2) ACTION STEPS

Where the objectives identify progress, the action steps layout process, including oversight, and roles, the marketing, and the communications plans. This is also an opportunity for us to reassess the appropriateness of the “go-to-people.” These go-to-people are those who have the ability to make things happen because of their specific spheres of influence.

The action steps are detailed tasks and activities to complete to meet the objectives, and thereby meeting the goal.
Think of the action steps as a checklist. Each set of action steps will be unique to each jurisdiction; however, many will include these themes:

- How to share information and timelines for receiving progress reports from those people accountable for each task.

- List of specific tasks required to meet the objectives:
  - base line measure (if one hasn’t been taken, when this may happen)
  - development of specific business and talent attraction activities
    - Type and number of activities will be specific to the jurisdiction, but may include:
      - Inventory:
        - studio ready spaces
        - qualified and eligible businesses and professionals
        - community aesthetics
        - educational and training institutions
      - Working with municipality on technology infrastructure and so on
  - overarching marketing and communications:
    - brand development – aligning the value and values of the jurisdiction with the experience of our customers (matching our walk to our talk)
    - redevelop website, social media presence
    - selection of specific tradeshow, conferences, and festivals to attend
    - collateral materials (booths, brochure, e-chures, swag)
    - Re-shoot location pictorials and add GPS markers
    - Entry/exit interviews (business starting, ending and/or periodic)
  - external marketing and communications:
    - sourcing and communicating business development and skills attraction needs and opportunities
    - brand + advertise: to whom, how, how often
  - internal marketing and communication – “proof of accomplishments” to our allegiance, alliances and partners; to whom, how, how often.
  - Risk management and crisis communications – in the “unlikely event of an unlikely event”
    - Who is the centre point of contact?
    - Who is on the decision making team?

- phas: when to move from one action step to the next

- Revisions: who and how to determine a revision, how to implement.
3) **BUDGET**

In an ideal world, we devise the budget after we develop the action steps. The budget phase includes all financial plans tied to the tracking of the action steps and the objectives and the goals.

In an ideal world, the budget is a commitment of fiscal resources to implement the strategy. An approved budget also signifies our (collective) belief and approval that the strategy will achieve what we (collectively) believe it will. An approved budget is also a sign of accountability. It’s the engagement piece, it’s where the rubber meets the road.

In reality, we have an operating budget, and we are required to “justify” reasons for money to cover additional expenses. Until this process changes we will require a funding proposal.

This is a repeating theme however, before we begin thinking about applying for money; we ensure the support of our allegiance, alliances, and partners. An application for money will expose weakness in the solidarity of our allegiance, alliances, or partners. Find out before initiating the application process, because it will be too late afterwards.

**CUTTING THE BUDGET**

No discussion about budget is complete without the term “cutting.” At the crafting of this chapter, more attention is being paid to the humble penny than ever before. Our collective belts are on the last belt notch and we are all on a fiscal diet. Translation: at some point in our process, someone will demand we reduce our spending.

Be **strategic** about this process. Understand how cutting money today affects our tomorrow. Understand where we can reduce the budget, and where we need the full amount.

*How do we know where to cut?*

Good question and the answer is specific to the current needs of the jurisdiction, however; before making a decision to eliminate an activity because of budget concerns look at:

- Activities with potential for “underwriting:” contributions from one or, preferably, more than one source to bankroll that activity. The more familiar term is “sponsorship.” If we decide to go this route, be mindful of brands; strive for an alignment of values. Be clear about the obligation in return for funding before making a decision; and before signing an agreement.

- Prioritizing: Identify those activities to implement first. Lean towards those activities that will produce a noticeable result. If we decide to prioritize, be mindful that this may “shortcut” an activity; for example, moving ahead with a strategy based on anecdotal evidence rather than a base line measure. Yes, we can do this, but it requires considerable, diligent tracking of EVERYTHING to factor in assumptions; as well as a large amount of reciprocal trust among our allegiance, our alliances, partners, and ourselves.

- The final option is reducing the scope or eliminating an activity: similar to prioritizing, we selectively cull the activities by determining which activities have the least amount impact on the overall outcome. If we decide to take this course of action, be mindful that whatever we cut might be cut – forever. We set a precedent for not needing an activity by eliminating it and we create a future where we do more with less. On a positive note, if an activity might have been included “because we’ve always done it this way,” we now have a good reason to ditch it.
PROPOSAL WRITING

In the chapter on “Business, Workforce, and Skills Development,” we examined how the business case gives the decision maker confidence in making a favourable decision. The business case does this by aligning the strategies of both the plan and the overarching goal of the jurisdiction, rather than the limited purpose of a granting authority. I do believe that as we collectively move forward through this pan-economic shift, we will see more business cases, and less “grant” processes.

For now, we have to deal with the granting process. We need to align the language of our strategy with the language of the granting authority: the entity providing the cash.

This is an art form; this isn’t rewriting our strategy to match the grant – NO. Re-writing a strategy to fit a proposal might become problematic in the accountability phase of the grant. Instead, we examine the criteria of grants offering sums in the amount we require, identify the closest match in process and theory, and then translate our strategy into the language of the grant(s.)

The first step towards a successful application – receiving the cheque – is to have ALL our assets aligned and talking the same talk – delivering the same message. Anything less than unified message of support for the strategy, increases the possibility that our application will be rejected.

We also know that rejection from lack of support differs from rejection because it’s “not the right time,” or “it’s not the right strategy,” or “just not yet.” As we learned in “Stakeholder Relations” with careful maneuvering it is possible to overturn “not now” rejection by understanding what lead to that decision.

4) DEFINE TRACKING PARAMETERS

When we measure the baseline of assets in the jurisdiction, we develop the criteria to track the progress of our strategy. From the chapter “Measure and Track,” we defined track as the comparisons of data sets over timeframes or between jurisdictions or both.

But – what if we didn’t do a baseline measure, we only have the results of the investigation. The investigation still provided us with:

- # of union/industry/business associations
- Types of union/industry/business associations
- # of shoots
- # of people resourced in the jurisdiction to service the shoots
- # of businesses resourced in the jurisdiction to service shoots
- # of training and post secondary education institutions
- description of community amenities

The numbers may not be authenticated, but they are useful.

In “Measure and Track,” we decided to use the MS Excel spreadsheet to track our information, because that program can easily illustrate data into a chart or a graph. While this covers the mechanism for tracking, we need to understand what we mean when we say we must be RUTHLESS and track results - ALWAYS.
We ask questions like, Why? How? What did we do? What didn’t we do? What changed? What didn’t change?

What remained the same for:
- New business: startups or coming from another jurisdiction, or brand new industries, like game development, or VFX or animation, etc
- No business
- No change in business

Anytime something does or does not happen – know why. As we learned in “Business Development,” this may not require intense analytical focus, but we need to identify what to keep doing, what to stop doing and what to change in order to reach our goal. We need to have regular contact with our alliances and partners to find out how the jurisdiction is doing, and to assess their continued support and enthusiasm for the goal.

5) IMPLEMENT THE PLAN

What have we accomplished so far:

Working towards the goal identified and agreed to during the roundtable. We:

1) devised objectives,

2) identified action steps:
   a. what we are doing
   b. how we are executing steps
   c. who is responsible for which tasks,
   d. how we will report progress on the tasks,
   e. How we brand, and advertise the jurisdiction
   f. How we look for new opportunities – Marketing
   g. How we communicate internally and externally
   h. The contingency plan in the event that the plan doesn’t do what we thought it would
   i. The risk managements and crisis communication plans, in the unlikely event, of an unlikely event

3) calculated a budget, and,

4) determined how we track results.

The workgroup is now ready to present this plan to our allegiance, alliances, and partners at a second roundtable.
This roundtable is only half a day; and requires senior decision makers from allegiance, alliances, and partners to attend.

**Who are we talking about when we say “senior decision makers?”**
The senior decision makers are those who have the authority, accountability, and responsibility to give the green light to implement the plan. Once our allegiance, alliances, and partners agree to the plan, the workgroup implements the plan the next day.

The workgroup becomes the oversight group to ensure all allegiance, alliances, and partners complete the tasks as agreed. Each workgroup member checks progress of tasks once a week – by phone or email. If it’s a phone call, then it should last no more than half an hour; but the preference is for email, with an attached document to cut and paste information into the master tracking document.

The workgroup meets once a week or once every two weeks – either in person or on Skype for example - to discuss progress. This meeting lasts no longer than one hour, with a preference for 30 minutes. Within 24 hours of that meeting, the workgroup sends an email to our allegiance, alliances, and partners to update them on progress.

**Why check in so often?**
To be diligent with completing the action steps to meet the objectives and to be responsive to changes within the jurisdiction and changes to the industry as these changes occur.

Once again, we use the plan to keep our allegiance, alliances, and partners engaged. Nothing is as engaging as hearing about actions and progress.

**SAMPLE SCENARIO**
Small size community within a mountainous region with multiple companies related to a single resource industry supports 60-75% percent of economic development, support companies (clothing, food, medical and pharmacy, etc) and services contribute 15% and “digital media” companies making up 8%.

**The Goal**
The jurisdiction would like to see a surge of game development companies, as well as motion picture production opportunities.

**WHY?**
To keep population in the region. Currently, the younger generation must leave the jurisdiction to pursue careers. Many have commented that they would stay if desired jobs existed in the region.

While many young people don’t return; some do, and many of those either start new companies, or relocate their existing companies. In addition, new professionals on vacation in the region seriously explore and then commit to relocating to region, provided their business model allows.

**The benefits to the region include**
- low overhead (moderate real estate prices),
- lower cost of living,
- potential to renovate heritage buildings to accommodate a game development or a motion capture (mo-cap) studio, and,
- access to large amounts of consistent power.
The challenges

- Lack of capacity of film professionals living in the region; with those living in the region at maximum bookings and/or under qualified.
- Those who are living in the region have a special appreciation for the geography; like movie production, the geography has very specific appeal, to a very narrow ratio of skilled professionals.
- Intermittent geographical access.
- No direct access to “big pipe” connected to potential server farm.
- Motion picture themes need to match geography.

Inventory of assets

- access via highway, 30 minutes to nearest airport (subject to road maintenance) serviced by daily regional carrier; frequent delays and cancellations due to winter weather
- availability of current technology infrastructure with “pipe” access to prospective server farm; the term used for a large facility containing numerous servers for the sole purpose of storing and/or transmitting data. Server farms are needed to render large packets of visuals to complete animation and visual effects projects
- satellite location of a training institution featuring digital content creation and practical arts
- natural geographic attributes result in high volume of recreational tourism for all seasons
- historic buildings in transition
- one time location for major motion picture.

Empirical data collection to come; in the meantime, the anecdotal evidence from the community description and the inventory we surmise that:

- Discrepancy in the percentages allotted to economic contributors needs clarification
- Digital media requires a definition
- Identify two investigations:
  - One time use as a location, require timeframe, recent? How long ago? What has changed? What has remained the same?
  - Access to current technology combined with the satellite-training institute and the possibility of the server farm.
**INVESTIGATION**

Use of digital technology; begin with either the industry association representing the technology group or the institution and work outwards to the community.

*Sample Scenario (APPENDIX: SAMPLE INVESTIGATION)*

<table>
<thead>
<tr>
<th>Industry Association:</th>
<th>Training/Educational institution:</th>
</tr>
</thead>
<tbody>
<tr>
<td>When and why did the association begin?</td>
<td>When did the facility open?</td>
</tr>
<tr>
<td>Are the current members different from the initiating members?</td>
<td>What kind of programs/courses do students learn and on what type of equipment?</td>
</tr>
<tr>
<td>What activities/ information does the association provide its membership?</td>
<td>What style of projects do the students work on?</td>
</tr>
<tr>
<td>What is the average size of company? How many companies?</td>
<td>How many students in total attend the institution?</td>
</tr>
<tr>
<td>Where/how, do these companies find new hires?</td>
<td>How many students attend digital media specific programs?</td>
</tr>
<tr>
<td>How many companies in total does the association serve?</td>
<td>Where does the typical student live – in or outside the community?</td>
</tr>
<tr>
<td>What type of customers does the membership serve?</td>
<td>Is there professional support for these programs/courses?</td>
</tr>
<tr>
<td>Where do most of their customers originate?</td>
<td>Where does the professional support come from (community or outside the community,) and, what form does the support take? (Money, time, or donation of old equipment?)</td>
</tr>
<tr>
<td>What types of advertising and communication does the industry association do to:</td>
<td>Ask for details about types of services offered by companies, and ask for introductions to companies.</td>
</tr>
<tr>
<td>• attract new companies to the region,</td>
<td></td>
</tr>
<tr>
<td>• attract new customers to use companies from the region,</td>
<td></td>
</tr>
<tr>
<td>• attract skilled professionals to the region, and,</td>
<td></td>
</tr>
<tr>
<td>• lever existing marketing programs of current members.</td>
<td></td>
</tr>
</tbody>
</table>

*What did the Investigation tell us?*

In absence of empirical measure, we can confirm:

- Eight-web design firms that regularly employ two to ten designers, graphic artists, and/or technology professionals; average time in business – five years. All but one company began in another jurisdiction and relocated; repatriated residents own all but one company.

- Of these firms, all but 1 indicate that 95% of their respective customer base originates outside the jurisdiction; and that 5 firms indicate that half of respective business originates from non-North American customers. Most customers are reported to be larger companies (500+ employees) doing business internationally.

- Two content production companies of three to six employees, and scaling to twenty, depending upon demand.

  - One company moved to the region five years ago, after the founder vacationed at a nearby ski resort. The founder brought two professionals into the region.
This company has a stock footage agreement with a North American specialty channel; and regularly sends stock footage and edited materials for broadcast. Method of delivery is digital drive via courier – which takes several days given the transportation challenges. Other customers include similar specialty channels in other international locales.

Given that:

- the company is not able to consistently employ more than six people,
- the average shoot days = 135 days, and,
- the average edits days = 85 days.

The company “hopes” that a graduate from the local educational institution would work “on call” and stay in the jurisdiction.

The other company is an audio video recording company in business for almost ten years, with three full time multi purposed employees. The company’s primary source for customers is the pool of resource companies in the region. The finished projects include:

- demonstration/training for new equipment
- advertising vehicles to attract new business
- streamers for corporate website (CEO messages etc)
- a/v annual reports.

Current customers have ties to other, multinational resource firms and have referred business to the A/V company, which is now acquiring an international reputation.

During the last three years, the company has formed freelanced agreements with five graduates from the local educational institution. This has allowed the company to split into two shoot crews, while one remains at home base to edit materials. With an average of 190 shoot days and 210 edit days, the company is now considering hiring a full time editor to manage the project flow.

One audio postproduction company, employing one full time person. The owner/operator relocated from another country after vacationing in the jurisdiction. This company works exclusively on large, international motion picture productions; sending and receiving digitized a/v files via satellite. Costly, but the lifestyle, low overhead and difference between time zones outweighs the cost of doing business.

While no current plans to expand, this owner/operator does support and participate with activities at the educational/training institution.

An unverifiable number of technology based companies; most are one-person shops, working on applications.
**PLANNING RECOMMENDATIONS**

Attraction of renowned game development studio and regular mainstream motion picture productions are longer-time frame goals.

Rather than attempting to engage where no capacity currently exists, build toward current strengths. Consider designing a strategy that includes:

- lever in region companies to attract extreme sports films,
- work with film commission to attract scene shots for action/adventure, historic and/or Sci Fi genre films,
- approach out of region union to inquire about skills and qualifications instruction for the training/ educational institution,
- review funding opportunities for start up and relocating companies; find out what is required to do business in the jurisdiction
- initiate discussions between municipality and natural resources companies to consider why attaching to the big pipe would be good for all residents, as well as business,
- approach federal body governing to inquire about potential to initiate skills attraction through immigration.

**Immediate next steps**

- Assess actual growth potential through a baseline measure of current assets, if one isn’t affordable:
  - Ask the government body responsible for business and vital statistics to run a data track going back ten years; tracking tax revenue, of non-resource based industry.
    - Why do we need to know these numbers? Asking for non-resource industries focuses our revenue measure. Going back ten years gives us a snapshot of activity within the region. The ten-year track shows us changes – or no changes in activity. This information helps us determine industry growth or contraction within the jurisdiction. When we identify the level of activity, we can begin to identify ways to influence that activity.
  - Work with industry association to develop a directory of companies – of one doesn’t currently exist. Link the content production section to the film commission’s site.

Although the Film Office facilitated connections and the planning process, delegating the action steps to members of the planning group. This is an overview of this jurisdiction’s plan:

**Goals:**

I. Work with natural resource companies and municipality to strengthen and expand fibre optic link into “big pipe” running through region.

II. Attract producers of specialized content related to outdoor leisure, recreation, extreme sports and reality programming (wilderness focus)
1) Objectives to be completed by the end of this fiscal (12 months from today)
   a. Develop a directory of all businesses and talent with a content creation focus (regardless of the type of content) operating and/or located in the jurisdiction.
   b. Formalize relationships between unions and training institutions to ensure students meet intern qualifications
   c. blueprint big pipe strategy, benefits to community and all sectors, and funding
   d. Attract one reality or extreme sports program

2) Action steps:
   The workgroup will update activities once per week via email, and meet once per month via Skype conference.

| Action Steps Delegation table (APPENDIX: ACTION STEPS DELEGATION TABLE) |
|-------------------------------------------------|-----------------|-----------------|-----------------|
| **Task**                                        | **Action**                                               | **Due date**    | **Responsibility** |
| Populate directory                              | Prepare and circulate three line request Who, what, why, when | 25 June          | Peter            |
|                                                | Design directory layout and advertising materials        | 1 July           |                 |
|                                                | Final (initial) population and final ad materials        | 30 July          |                 |
|                                                | Beta test and post advertising                           | 15 August        |                 |
|                                                | Completed directory (new entries every month)            | 1 Sept           |                 |
| Skills Qualifications                          | Identify appropriate union body, and office Email request for meeting with area rep, outline meeting expectations | 15 June          | Paul            |
|                                                | Depending upon results of meeting, set up meeting or conference call between union and Educational institutions | 20 June          |                 |
|                                                | Develop course work for qualifications, to be approved by Institution and launched first of the year. | 1 Sept           | Union rep + Education |
| Blueprint big pipe strategy                    | Initial meeting with consortium of resource based companies to discuss potential of tapping their respective fibre optic ring. | 20 June          | Mary            |
|                                                | Meet with municipality to discuss potential of applying for fibre optic infrastructure upgrade. | 20 June          | Barb            |
|                                                | Inventory assets at the municipal level and what is available at companies internally (pending results of initial meetings) | 20 July          | Harvey          |
|                                                | Prepare funding application: Building regional infrastructure incentive program offered by | 30 August        | Municipality     |
| Brand, Marketing, Advertising and, communications strategy | Develop brand in alignment with municipality and tourism efforts | Various delivery deadlines Final due: 30 August | Phil municipality and tourism |
|                                                | Design advertising campaign, and schedule | | |
|                                                | Obtain approval | | |
|                                                | Execute Ad plan | | |
| Attract one reality or extreme sports program  | Identify target companies producing reality and extreme sports | 25 June          | Jane + Consulates in target countries |
|                                                | Prepare digital information packages, include QT demo     | 30 July          |                 |
|                                                | Book “fam” tour with assistance from Consulate            | 30 August        |                 |
|                                                | Accumulate mailing list from inquiries and “fam” tours    | ongoing          |                 |
3) calculate a budget, (undisclosed) and,
4) determine how we track results (actual results undisclosed; for samples of the structure, refer to "Measure and Track.") tracking process: table and spread sheet comparisons:
   o money spent VS revenue gain
   o inquiries VS actual number of shoots
   o number of new companies post big pipe connection

WHAT TO DO WHEN IT’S NOT WORKING

Not all plans have “successful outcomes” – and reach the goal.

Why not?
Most likely because:
   • those plans did not have a intention; they were without focus,
   • without focus, they didn’t identify the type of action required to make things happen, and/or
   • they didn’t align our assets, resources and knowledge.

Likewise, plans for growth fail for similar reasons:
   • lack of focus,
   • lack of real knowledge about the jurisdiction, and/or,
   • lack of commitment from our allegiance, alliances, and partners; expressed by lack of follow through, lack of support for initiatives, lack of support for budget allocation.

What do we do?
Review the most recent track against previous track; whether it is the baseline measure or an investigation against indicators, and anecdotal evidence.

What are we looking for?
Our plan requires monitoring and we look for specific indicators to use as warnings that an adjustment to the plan is needed:
   • minimal gains/losses or stagnate tax revenues
   • minimal increase/decrease or no change in number of shoot/edit days
   • minimal increase/decrease or no change in number of businesses
   • minimal increase/decrease or no change in number of professionals working in the sector

As well as anecdotal evidence:
   • a more vocal sector
   • more criticisms of government program
   • less cohesive messaging from the sector
   • much more reactive to news from other jurisdictions
We are looking to see whether we missed something. If it’s not an obvious “something,” look for the seemingly small and seemingly insignificant “something.” Maybe an ally we thought wasn’t important moved away, or perhaps a merger or acquisition activity that was originally viewed as a good thing, turned out to be not that great; and ended up moving work outside of the jurisdiction.

Whatever the “something” is, we identify it before we determine what or if an action is needed.

**FINAL THOUGHTS**

The Film Office has an interesting, exciting, and challenging opportunity to facilitate growth through the jurisdiction. As connectors, communicators and brokers of relationships and information, today’s Film Commissioners are well positioned to drive economic growth within the jurisdiction.

It is important to remember that we do not work in isolation, nor do we do all of this work on our own. It’s impossible; singular effort is thankless and it doesn’t produce the same results as an engaged team. When we involve our allegiance, alliances, and partners in the process, we engage them. Their engagement fuels the long-term results we are hoping to gain.

By connecting our alliances to opportunities within the jurisdiction, by communicating the value of a robust content creation industry to our allegiance and partners, and by engaging our allegiance, alliances, and partners in the development process, the role of the Film Commissioner transcends location services to economic developer.

The final pages of this section review branding, marketing and advertising. Also included in these pages are over views of contingency planning, risk management and crisis communications. Although not technically related to economic development, these themes expand our expertise.
**Designing the strategy – the plan for growth**

*Why do we plan?*

A plan helps us focus our decisions and our actions. The plan is a set of guidelines that help us decide:

- what to focus on versus what is distraction,
- specific tasks and specific dates for completion,
- how to use information to determine progress, and,
- to let us know we’re off track, and, when we’ve reached the goal.

**PLANNING PROCESS**

The content on this page has been sized to fit into the workbook. This table in landscape, legal size format is in the APPENDIX. *(APPENDIX PLANNING PROCESS)*

<table>
<thead>
<tr>
<th>TASK</th>
<th>ACTION</th>
<th>DUE DATE</th>
<th>RESPONSIBILITY</th>
<th>RESULT</th>
</tr>
</thead>
<tbody>
<tr>
<td>inventory of assets investigation</td>
<td>Film Office canvass</td>
<td></td>
<td>Film Office, allegiance, alliances and partners</td>
<td></td>
</tr>
<tr>
<td>Baseline measure</td>
<td>Method of survey, Type of survey tool Service Provider</td>
<td></td>
<td>Film Office, allegiance, alliances, and partners</td>
<td></td>
</tr>
<tr>
<td>Roundtable</td>
<td>Prepare agenda, List of attendees, contact and invite Prepare presentation materials including survey conclusions and PPT, Book room/Catering</td>
<td></td>
<td>Host (Government body, film office or industry association)</td>
<td></td>
</tr>
<tr>
<td>Identify the goal(s)</td>
<td>Discussion</td>
<td></td>
<td>All roundtable attendees</td>
<td>Agreement</td>
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<tr>
<td>Identify work group</td>
<td>Volunteer</td>
<td></td>
<td>All roundtable attendees</td>
<td>Agreement</td>
</tr>
<tr>
<td>Devise a set of objectives</td>
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<td>Work Group</td>
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<tr>
<td>Develop action steps</td>
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<td>Marketing planning</td>
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<td>Branding</td>
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<tr>
<td>Marketing</td>
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<td>External</td>
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<tr>
<td>Crisis</td>
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<tr>
<td>Contingency planning</td>
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<tr>
<td>Risk Management</td>
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<tr>
<td>Calculate Budget</td>
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<td>Design tracking process</td>
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<td>Calculate Budget</td>
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<td>Report progress to:</td>
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<tr>
<td>Workgroup</td>
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<td>Report progress to:</td>
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<tr>
<td>roundtable attendees</td>
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</table>
Our point of focus of the planning session is the common interests among our stakeholders. These common interests help us clarify which activities that have the greatest potential to increase business. This is the standard planning phase. Now, let’s have a look at the “need trinity.”

**CHECK LIST**

We know we are ready to plan when:

- Collaborative relationships; We know our stakeholders, and use communication as a tool to articulate value
- Know why filmmakers choose the jurisdiction for their location shoots
- We have a either a baseline or investigation of the jurisdiction
- We have identified the USP – the jurisdiction’s Unique selling proposition
- Preliminary scope for acceleration activities

**SW/SLOT ASSESSMENT**

SW/SLOT assessment examines the Strengths – Weaknesses/Limitations – Opportunities – Threats facing the project, the plan, the organization (entity) sector, and jurisdiction.

Assessing internal and external before, during, and post planning process helps us identify shifts required to make our strategy dynamic and sustainable – long term. A well-rounded strategy examines the internal workings of the organization, as well as external SW/LOTS. Date all assessments to demonstrate activity towards the goal(s.)
**EXERCISE: SW/SLOT**

As you may recall, we explored the SW/SLOTS assessment in context of “Marketing and Communications Planning.” If you have completed that work, bring that SW/SLOT assessment forward now, and review the table on the next page, adding in information you have collected up until now.

Revise these tables to include any new information you learn during the roundtable.  
(ANNEX: SW/SLOTS)

<table>
<thead>
<tr>
<th>INTERNAL</th>
<th>STRENGTHS</th>
<th>WEAKNESSES LIMITATIONS</th>
<th>OPPORTUNITIES</th>
<th>THREATS</th>
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</thead>
<tbody>
<tr>
<td>Operational leadership</td>
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<tr>
<td>Financial strength</td>
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<td>Capabilities</td>
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<td>Responsiveness of workforce</td>
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</table>

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<tr>
<th>EXTERNAL</th>
<th>STRENGTHS</th>
<th>WEAKNESSES LIMITATIONS</th>
<th>OPPORTUNITIES</th>
<th>THREATS</th>
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<tr>
<td>Jurisdiction’s reputation</td>
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<tr>
<td>Market share</td>
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<tr>
<td>Jurisdiction’s ability to meet market needs</td>
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<tr>
<td>Jurisdiction’s ability to meet market trends</td>
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<tr>
<td>Value your Jurisdiction’s brings to the market</td>
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<tr>
<td>Jurisdiction’s quality</td>
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<tr>
<td>Customer service and support quality</td>
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<tr>
<td>Quality /effectiveness of past marketing</td>
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<tr>
<td>Cost of working in the jurisdiction</td>
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<tr>
<td>Distribution/Communication</td>
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<tr>
<td>Geographic location</td>
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</table>
**ROUNDTABLE**

We are now ready to host a stakeholder’s round table. The Roundtable shares our results from the investigation or baseline measure, assesses stakeholder commitment, and lays the groundwork for planning. The roundtable is for those allies who reside in the jurisdiction.

Unless you have a solid relationship with a studio contact, it is doubtful that the studio would have an interest, let give the time, to attend a roundtable. Having said this, there might be an opportunity to arrange for a meeting with your allegiance, a few key decision makers representing allies and partners, and a representative of the studio if and when this person makes a site visit to a location shoots in your jurisdiction.

The subtext of the roundtable process is to demonstrate support by alliances and partners, to your allegiance. Think about a blend of quantity – number of participants, and quality – those who make decisions and are able to commit immediately.

The roundtable process provides the opportunity to identify:

- the style of incentive program will best strengthen and build the content creation industry,
- champions – in government, industry and community,
- lobby issues, and,
- target for implementation.

**Who to invite?**

This is an executive level event for senior level decision makers – those people who make decisions that directly affect the direction of the entities they work with; or those people who have influence over the decisions made. The presentation of the proposal will include:

1. a visual overview (PowerPoint, keynote, video whatever you feel is the best method)
2. a one page summary fronting a detailed handout with an acknowledgements page, and,
3. an appendix of the research points measures and tracking, details of tax burden/ tax benefit ratio and any other calculations; such as the multiplier effect.

The discussions to identify the goal are the most important part of the roundtable; and these discussions will take the most amount of time. *(APPENDIX ROUNDTABLE)*

- 45 minutes will go to opening remarks, reviewing activities up until the round table,
- 45 minutes will go towards explaining the baseline measure,
- about 30 minutes will go to questions from the floor, open discussion.
- 15 minute coffee/ message check break
- 1.5 hour to introduce probing questions, and begin conversation
- 45 minute lunch break
- 1 hour breakout groups to identify the goal
- 1 hour present the finding of the breakout group
- 15 minute coffee/message check break
- 30 minutes finalize the goal
- 30 minutes nominate the work group
- 30 minutes schedule the work group and then next round table
- 15 minutes thank you and closing remarks.
THE WORKGROUP

Although it is important to engage our allegiance, allies, and partners in the high level planning — setting the goals (which is normal for planning sessions, goals are set by those who govern us.) Those who will be responsible for achieving the goals develop the plan.

Think about this, it makes sense that the Film Office in conjunction with one representative from the Unions, Industry Associations, post secondary and training institution, and the municipality develop the plan. They represent the frontline, the first point of contact, and they represent the people who are in the jurisdiction almost daily, and can assess progress and/or failure quickly enough to revise the plan, before it becomes a detriment to the goal.

The work group is tasked with devising the objectives (also known as our KPIs – key performance indicators) Objectives specify the measurable achievements over a timeframe.

EXERCISE: ACTION STEPS DELEGATION TABLE

*Of your allies and partners, do you have an idea of specific individuals who may wish to be a part of the Work group? Think about those people, and whether or not they would have to time to join the work group.*

**YOUR ALLIANCES:**

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

**YOUR PARTNERS:**

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

(Note: You represent your Allegiance in the workgroup)

Once participants have committed to the workgroup and agreed to complete the assigned tasks, plot the assigned tasks, action, due date, and name of the person responsible on the action step delegation table.

It is important to POST this table in a visible place, either on a password protected area of your website, or an Ethernet (internal, no public access site) or physically on a calendar board. Update the table as each task is completed.

**ACTION STEPS DELEGATION TABLE**

<table>
<thead>
<tr>
<th>Task</th>
<th>Action</th>
<th>Due date</th>
<th>Responsibility</th>
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</table>
IDENTIFYING THE GOAL

Before the end of the roundtable, we use the momentum of enthusiasm to:

- identify the collective goal: Where to focus our growth strategy,
- appoint a work group to develop the plan, and schedule the group’s one and only planning day,
- schedule the next roundtable to present that plan (within one month is doable; two at the outside)
- agree to implement the plan with five business days of that round table. (This gives the workgroup up to two days to make revisions)

The roundtable will probably be the first time our allegiance, alliances, and partners get together. For this reason, scheduling the roundtable as a full day, rather than a half day will provide an opportunity for these groups to begin to build their respective relationships.

During the roundtable, we will listen for:

- additional feedback and response to the results of the investigation,
- a unified thought about the future of the jurisdiction, and,
- comments that appear to be in disagreement with discussions.

The traits for the goal are:

- a long term goal, “the big hairy goal,” also defined as the ultimate destination if neither time nor money mattered, and, a short term goal, the realistic what we want to achieve in the next fiscal year, and perhaps the fiscal year after that.

- The long-term goal captures our respective imaginations, and provides that reason d’être - the reason we do what we do. The reason d’être gives us the reason to continue when we are knee deep in making the short-term goal happen.

- The short-term goals are a stepping-stone to the long-term goal. Short-term goals are the single step that begins the journey and the subsequent that keep us on track. We design action steps to achieve the short-term goal(s.) Those tasks engage us and confirm our movement towards the long-term goal. The planning document template is on page 47 of the workbook.

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The goal must pass a validity litmus test before we label it a goal. We are more concerned about the realistic opportunity of the short-term goal to meet our expectations based on the information we have, and less concerned about the long term goals – for now.

*How do we test validity?*

We answer these questions:

- Why are we doing this
- What result are we hoping to gain by doing this?

**EXERCISE: STAKEHOLDER EXPECTATIONS**

Think about the reasons your allegiance, allies, and partners would want to engage in this process. What are their respective expectations for results?

**YOUR ALLEGIANCE:**

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**YOUR ALLIANCES:**

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**YOUR PARTNERS:**

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When we get to our (collective) motivation, the reason why we want to do this we get to the heart of ownership and engagement among our allegiance, alliances, and partners – regardless of their hidden agendas; their ulterior motives(to keep their jobs, to keep their businesses, to not have to move for work, etc.)
EXERCISE: GOALS

Using the information you have acquired so far, fill in the blanks, and answer the questions in the following planning document. (APPENDIX: PLANNING DOCUMENT)

Identify the agreed goal(s):

I. ________________________________________________________________

II. ______________________________________________________________________________

III. ______________________________________________________________________________

DESIGNING THE PLAN

(APPENDIX: PLANNING DOCUMENT)

1) DEVISE OBJECTIVES

Objectives specify the measurable achievements over a timeframe. The objectives set up the criteria for the measure. The objectives set your milestones. “X” will happen by “Y” date.

Objectives also confirm the appropriateness of the goal. It is possible that during the objectives process the work group discovers that the direction decided upon isn’t realistic; this is unusual, but possible. This is why decision makers and representatives from all stakeholder groups in the jurisdiction must take their seats at the roundtable-planning phase. All stakeholders – have a stake in the process. This is too important to say “too bad you weren’t there, this is what we’re doing,” because our efforts will be undermined.
EXERCISE: STAKEHOLDER OBJECTIVES

Use the information from the exercise on Stakeholder expectations to think about the objectives your allegiance, allies, and partners may have for this planning process, and list those that come to mind.

YOUR ALLEGIANCE: _____________________________________________________________
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YOUR ALLIANCES: _____________________________________________________________
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YOUR PARTNERS: _______________________________________________________________
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Using the information you have acquired up to now, list four (4) objectives that would be appropriate for your jurisdiction. Remember to devise objectives based on Best FIT with current assets of the jurisdiction, with the Best opportunity for REALISTIC growth, and, Most REASONABLE to implement.

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2) **IDENTIFY ACTION STEPS**

Like the objective, the workgroup devise the action steps, because members of the workgroup and the entities they represent will be responsible for carrying out the action steps.

Where the objectives identify progress, the action steps layout the “how to” process, like oversight, roles, and, the marketing, and the communications plans. This is another opportunity to reassess the appropriateness of the members of the workgroup, and our “go to” people; those people who have the ability to make things happen because of their specific spheres of influence.

The action steps are detailed tasks and activities to complete to meet the objectives, and thereby meet the goal. Think of the action steps as another checklist. Each set of action steps will be unique to each jurisdiction; however, there are many common traits.

Action steps layout process, including oversight, and roles to examine:

- What we are doing
- How we are executing steps
- Who is responsible for which tasks,
- how we will report progress on the tasks,
- How we brand, and advertise the jurisdiction
- How we look for new opportunities – Marketing
- How we communicate internally and externally
- The contingency plan in the event that the plan doesn’t do what we thought it would
- The risk managements and crisis communication plans, in the unlikely event, of an unlikely event

**EXERCISE: IDENTIFY ACTION STEPS**

*Using the information you have acquired up to now, list recommendations for action steps:*

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3) CALCULATE THE BUDGET

The budget is calculated by the workgroup, but approved by the decision makers.

In an ideal world, we devise the budget after we develop the action steps. The budget phase includes all financial plans tied to the development, implementation and tracking of the goals, objectives and action steps. In reality, we assigned an operating budget that we are required to “justify” additional expenses.

Whatever input you provide for the budget of your Film Office, remember to budget realistically, rather than “padding” the budget to protect it from cuts. When we start with a budget that represents an ideal goal, supported with data, we educate our allegiance, industry alliances, and, government and education partners about the value of investing in the content creation industry within the jurisdiction.

If the ideal budget needs to be trimmed, then also trim the amount of value to the jurisdiction. Creating the link between budget and value helps align stakeholders’ expectations with reality.

CUTTING THE BUDGET

Before making a decision to eliminate an activity because of budget concerns look at:

- Activities with potential for “underwriting,” the more familiar term is “sponsorship.” If we decide to go this route, be mindful of brands; strive for an alignment of values. Be clear about the obligation in return for funding before making a decision and before signing an agreement.

- Prioritizing: Identify those activities to implement first.

- The final option is reducing the scope or eliminating an activity: similar to prioritizing, we selectively cull the activities by determining which activities have the least amount impact on the overall outcome.

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**EXERCISE: CALCULATE THE BUDGET**

Using the following table from “Marketing and Communications Planning” as a guide, calculate how much money will be required to fulfill the planning process, and the action steps.

Remember to include your time spent on preparations and research, as well as specific planning meetings.

Remember to include anticipated grant money and value-in-kind contributed by alliances and partner groups.

<table>
<thead>
<tr>
<th>DESCRIPTION</th>
<th>1(^{st}) QUARTER SPEND</th>
<th>2(^{nd}) QUARTER SPEND</th>
<th>3(^{rd}) QUARTER SPEND</th>
<th>4(^{th}) QUARTER SPEND</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel full time</td>
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<td>Personnel part time</td>
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<tr>
<td>Contractors</td>
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<tr>
<td>Outside Services *</td>
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<tr>
<td><strong>TOOLS</strong></td>
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<tr>
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<td>Multi-social media</td>
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<tr>
<td>Publications</td>
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<tr>
<td>Peripheral construction**</td>
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<td><strong>ACTIVITIES</strong></td>
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<td>Conferences</td>
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<td>Tradeshows</td>
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<tr>
<td>Industry Events</td>
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<tr>
<td>Constituency mtgs</td>
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<td>Hosted events</td>
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<tr>
<td><strong>EXPENSES</strong></td>
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<td>Cell phone</td>
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<tr>
<td>Office</td>
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<tr>
<td>Office equipment***</td>
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<tr>
<td>Vehicle/Mileage</td>
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<tr>
<td>Travel (outside the jurisdiction)</td>
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<tr>
<td>Accommodations for inbound</td>
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<tr>
<td>Accommodations for outbound</td>
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<tr>
<td><strong>Sub total</strong></td>
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<tr>
<td><strong>Grants/Stipends</strong></td>
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<tr>
<td><strong>Grand total</strong></td>
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</tbody>
</table>

*Outside services: any work done by outside personnel, but not categorized.
**Peripheral construction: zap screens, tradeshow booths, promotional items such as pens, etc.
***Office equipment: desks, chairs, faxes, phones, copiers – all physical equipment in the office.
PROPOSAL WRITING
While we might be tempted to look for grants to fill budget shortfalls, consider a more effective pursuit is to **align the language of our strategy with the language of the granting authority**: the entity providing the cash.

This is an art form; this isn’t rewriting our strategy to match the grant – NO. Re-writing a strategy to fit a proposal might become problematic in the accountability phases of the grant – and the project. Instead, we examine the criteria of grants offering sums in the amount we require to identify the closest match in process and theory, and then **translate – interpret** our strategy into the language of the grant(s).

The first step towards a successful application – receiving the cheque – is to have ALL our stakeholders aligned and talking the same talk – delivering the same message. Anything less than a unified message of support for the strategy increases the possibility that our application will be rejected.

**EXERCISE: PROPOSAL WRITING**
*Using the information you have acquired up to now, review the funding options from “Financing and Incentives,” and write an information note explaining why a funder would contribute to your plan.*

1. What is the intention? (the project summary, including goals, and anticipated results)
2. Why it is important? (Include the tracking of results**, the budget total and identify which parts of the budget the grant will support)

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**Review” Measure and Track,” or wait until we have reviewed this material, in the next section of this workbook.

3. Who supports this intention? (Remember to list all alliances and partners – the industry, post secondary education, community, and multi levels of government representatives supporting this plan. To support your application, consider attaching summaries of the minutes from roundtable discussions and industry, education, and/or community outreach meetings)
4. How you intend to proceed with the project – how will the money benefit your project and how will your project benefit the funding body? What

_____________________________________________________________________________________

_____________________________________________________________________________________

_____________________________________________________________________________________

_____________________________________________________________________________________

5. When you intend to begin; what is the Timeline?

_____________________________________________________________________________________

_____________________________________________________________________________________

_____________________________________________________________________________________

6. When do you expect to deliver these results to the funding body?

_____________________________________________________________________________________

_____________________________________________________________________________________

7. What do you expect the funding body to do with this information? (Identify the key benefit to the funding body for contributing to this project. Remember the target audience in “Marketing and Communications Planning?” Position the benefit in terms of the funding body – not as a benefit to your organization.)

_____________________________________________________________________________________

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_____________________________________________________________________________________
4) DETERMINE THE TRACKING PARAMETERS

Track all activity relative to the goal(s.) When we measure the baseline for assets in the jurisdiction, we develop the criteria to track the progress of our strategy. From the chapter “Measure and Track,” we defined track as the comparison of data sets over timeframes or between jurisdictions or both.

Anytime something does or does not happen – know why. As we learned in “Business, Workforce, and Skills Development,” this may not require intense analytical focus, but we need to identify what to keep doing, what to stop doing and what to change in order to reach our goal. We need to have regular contact with our alliances and partners to find out how the jurisdiction is doing, and to assess their continued support and enthusiasm for the goal.

EXERCISE: IDENTIFY WHAT TO TRACK

Identify what to track and how often to track. Once again, you may review the chapter on “Measure and Track” to determine how to track activities, that will provide information about the progress towards the goal(s) set for your jurisdiction.

5) ASSESS PROGRESS

Periodically review the action steps to determine whether the plan requires adjustments to meet new circumstances, opportunities, and/or challenges.
6) IMPLEMENT THE PLAN
In an ideal world, the workgroup would have the authority to implement the plan as soon as it was complete. In the real world, we schedule another roundtable – this time only a half day (maximum four hours) for senior level decision makers to approve the plan.

In an ideal world, the completed plan mirrors the first round table discussion; highlights of the completed plan are read and approved during the half-day round table.

In the real world, people sometimes forget what they agreed to, or sometimes they come across information that they don’t share until prompted. For a multitude of reasons, we don’t expect the plan to be approved at the second roundtable – but we do make provisions that the plan will be implemented as soon as the revision is complete. When changes are complete, an email informs the roundtable members that the plan is now active and a PDF copy is attached.

Sometimes plans go into limbo because assumptions have been made about implementation – or the revision process – or both. Close off those points of limbo, or the decision makers might want to “perfect the plan.” There is no such thing. A desire to please many leaves pleasing no one.

Notes:
DISCLAIMER:
The additional resources and reading list originate from my personal resource and reading lists. The authors, their publishers, and/or any other businesses or entities do not compensate me for making these suggestions. I encourage you to check the reading materials out from your local public library, to determine whether or not these suggestions are appropriate for your needs.
CLASS DAY GROUP EXERCISE

The following pages are a short survey, and a sorting list, to help you detect activities in the jurisdiction.

When you go through the planning process in your jurisdiction, you will be working with perhaps more or fewer pieces of information; this exercise helps you become accustom to working with different formats for presenting information.

In advance of the master class, the survey was sent to attendees from seven different film offices, covering a variety of territories around the world. All had unique challenges and opportunities. When the surveys were returned, the information was filtered onto the survey worksheet, - one for each location, but *without the identifying which film office provided the details*.

Five surveys and companion worksheets were selected at random and distributed to the attendees, who were also randomly selected for five workgroups. These groups were given one hour to prepare a business case based only on the information provided.

Within each workgroup, members took on the roles of the allegiance, allies, and partners, and the film office. The purpose of the exercise was to sort out obvious issues that may hold up a planning session, and, to gain perspective – by “walking in someone’s shoes.”

At the end of the one hour planning session, each group had fifteen minutes to present their respective business case, followed by a five minute question period. Each presentation was put to a vote, whether or not to approve the next steps; with attendees opting to explain why they chose that result.

The survey tool covers the minimum amount of detail required to begin to make decisions about how to proceed with next steps within the jurisdiction, while the worksheet sorts the information, with an opportunity to comment, or make observations.
THE SURVEY TOOL

Please answer the following multiple-choice questions and provide as much detail as possible to the answer questions. Please highlight the appropriate answer in RED and BOLD

1) Describe your relationship with the government body responsible for funding your office:

   1 2 3 4 5 6 7 8 9 10
   Non-existent strained but amicable Excellent – aligned

2) Describe your relationships with the industry residing in your jurisdiction:
   a. The unions (leave this question blank if no unions reside in your jurisdiction)

      1 2 3 4 5 6 7 8 9 10
      Non-existent strained but amicable Excellent – aligned

   b. The industry association
      (leave this question blank if no associations reside in your jurisdiction)

      1 2 3 4 5 6 7 8 9 10
      Non-existent strained but amicable Excellent – aligned

   c. The secondary industry
      (leave this question blank if no secondary industry reside in your jurisdiction)

      1 2 3 4 5 6 7 8 9 10
      Non-existent strained but amicable Excellent – aligned

   d. The chamber of commerce
      (leave this question blank if no chamber of commerce reside in your jurisdiction)

      1 2 3 4 5 6 7 8 9 10
      Non-existent strained but amicable Excellent – aligned

3) Describe your relationships with other stakeholders residing in your jurisdiction with:
   a. The municipal government(s) (if more than one municipality provide the number:
      (Leave this question blank if no municipalities govern in your jurisdiction.)

      1 2 3 4 5 6 7 8 9 10
      Non-existent strained but amicable Excellent – aligned

   b. The post secondary and/or training institute(s) (If more than one, how many? ____)
      (Leave this question blank if no PS and/or training institutions reside in your jurisdiction)

      1 2 3 4 5 6 7 8 9 10
      Non-existent strained but amicable Excellent – aligned

   c. The community at large (including special interest and aboriginal groups)

      1 2 3 4 5 6 7 8 9 10
      Non-existent strained but amicable Excellent – aligned

4) Describe connectivity within your jurisdiction?
   a. Dial up
   b. High speed (fibre, cable, with or without satellite support)

5) Is there natural resource or other large non-entertainment industry active in your jurisdiction?
   YES NO
6) Is there an airport within the jurisdiction?
   YES  NO
   a. Is the airport an international airport?
      YES  NO
   b. Is there a non-stop connection between this airport and a major international airport?
      YES  NO
   c. Are flights daily, regular, and scheduled?
      YES  NO

7) Is there a major roadway – highway system connecting to the jurisdiction?
   YES  NO

PLEASE ANSWER THE FOLLOWING QUESTIONS:

8) In three sentences, describe the type(s) of industry activity that occurs in your jurisdiction.

9) How many major motion picture location shoots occurred in your jurisdiction last year?

10) How many series location shoots occurred in your jurisdiction last year?

11) How many movie of the week (MOW) location shoots occurred in your jurisdiction last year?

12) Are you aware of digital productions within your jurisdiction?

13) How many production companies reside in your jurisdiction?

14) How many production companies were in the jurisdiction last year?

15) How many postproduction companies reside in your jurisdiction?
16) How many postproduction companies were in the jurisdiction last year?

17) How many animation and or visual effects companies reside in your jurisdiction?

18) How many animation and or visual effects were in the jurisdiction last year?

19) Name the other types of entertainment industry related businesses in your jurisdiction. (Include game development studios, stunt work companies, sound companies, rentals: equipment and vehicles, caterers, personal services, accommodations, etc.)

20) List the amount and types of accredited, skilled professionals residing in your jurisdiction. (Leave blank if you don’t know or if there aren’t any.) (Include: cines, make-up, lighting and sound, freelance editors, and animation designers, etc.)

21) Describe the uniqueness of your jurisdiction. The special reason filmmakers choose your jurisdiction as a location. This could be a unique natural feature, a mutual urban landscape (can double for a variety of other cities,) and/or a significant number of accredited, skilled professionals servicing the jurisdiction. Also, include any approved, future improvements for the jurisdiction, and their respective timelines.

22) Please describe the tax credit offering of your jurisdiction. If your jurisdiction doesn’t have a tax credit, then please mark NA.
<table>
<thead>
<tr>
<th>SURVEY WORK SHEET</th>
<th>Relationship</th>
<th>Reside in the jurisdiction</th>
<th>ACTIVITY</th>
<th>Current year</th>
<th>Last year</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
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<td>Allegiance</td>
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<td>Incentives</td>
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<td>Allies</td>
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<td>Chamber of commerce</td>
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<td>Partners</td>
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<td>Municipalities</td>
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<td>Edu/Training</td>
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<td>Community at large</td>
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<td></td>
<td>Other industry</td>
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<td>Uniqueness of the Jurisdiction</td>
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<td>High speed virtual access</td>
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<td>Int’l airport</td>
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<td>Major roadway</td>
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<td>Other</td>
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<td>Mature TV</td>
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<td>Young film industry</td>
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<td>Mature Music Festivals</td>
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<td>Production Companies</td>
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<td>Post Production</td>
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<td>Animation and/or VFX</td>
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<td>Skilled, accredited professionals</td>
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<td>Industry Activity</td>
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<td>Motion Picture</td>
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<td>MOW</td>
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<td>Animation</td>
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<td>Game Development</td>
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<td>Outsource Centre</td>
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<td>Visual Effects</td>
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<td>Animation</td>
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<td>Game Developers</td>
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</table>
I am somewhat surprised how sometimes content creation is not thought of as a business, but only as a creative pursuit. I believe it is both – the creative component works hand-in-hand with a business component, as well as an innovation driver.

The main challenge is the marketability of the outcome, which relies on a public audience. Like a trend in fashion, lifestyle, automotives, it is possible, and prudent to apply practical business principles to not only to content creation, but to those pursuits attracting business into the jurisdiction.

"What Is Strategy?"
by Michael E. Porter, who argues that rivals can easily copy your operational effectiveness, but they can't copy your strategic positioning—what distinguishes you from all the rest.
@MichaelEPorter
Summary document is available for free download at:

“Plan B: How to Hatch a Second Plan That’s Always Better Than Your First”
by David K Murray
You may also enjoy reading this article “The Real Mother of Invention” on Bloomberg press
http://www.businessweek.com/magazine/content/09_36/b4145072739717.htm

"Leading Change: Why Transformation Efforts Fail"
by John P. Kotter, Who states transformation is a process, not an event. It takes years, not weeks, and you can’t skip any steps.
Summary document is available for free download at:
http://www.power-projects.com/LeadingChange.pdf

“Great by Choice: Uncertainty, Chaos, and Luck--Why Some Thrive Despite Them All”
by Jim Collins, Morten T. Hansen
http://www.jimcollins.com/books.html
Book review by Jim Clemmer

“Putting the Balanced Scorecard to Work”
by Robert S. Kaplan and David P. Norton, includes practical steps and examples from companies that use the balanced scorecard to measure performance and set strategy.
Summary document is available for free download at:
http://learningresourcesunlimited.co.uk/app/download/3703313202/Ch+Kaplan+and+Norton.pdf

"Meeting the Challenge of Disruptive Change"
by Clayton M. Christensen and Michael Overdorph, explains why so few established companies innovate successfully.
Summary document is available for free download at:
INFORMATION NOTE

The information note summarizes answers to the following questions, using a maximum of three lines per question:

1. What is the intention?
   o why are you doing this?
   o What do you expect your boss to do?
     ▪ Make a decision
     ▪ Approve a project
     ▪ Approve budget

2. Why it is important?
   o from the government’s point of view, identify potential gains for:
     ▪ make significant contributions to tax revenues,
     ▪ generate sustainable employment, and
     ▪ attract new businesses
     ▪ establish where to focus our growth strategies
     ▪ provide an active government presence by connecting with potential allies and partners
   o estimate costs:
     ▪ All costs of all activities

3. Who might support this intention?
   o List all the significant supporters, from Government, business, community and industry

4. How you intend to proceed with the______________?
   o Explain your process for the activity, include relevant materials like questions, as an appendix to the briefing note

5. When you intend to begin and end the investigation process?
   o Timeline

6. When do you expect to deliver these results to your boss?
   o Identify a date within two months of the request
   o Make sure you give yourself enough time to perform the activity and prepare the follow up document

7. What do you expect your boss to do with this information? This links up with point #1, and brings the document to full circle
   o Make a decision on whether or not to proceed with the investigation process.
     ▪ You will make two conclusions, one if the decision is “No,” and the other if the decision is “Yes.”
     ▪ A proposed “decision required by” date.
   o Also, list postponements for decisions.
## SAMPLE INVESTIGATION

<table>
<thead>
<tr>
<th>Industry Association:</th>
<th>Training/Educational institution:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>When and why did the association begin?</strong></td>
<td><strong>When did the facility open?</strong></td>
</tr>
<tr>
<td><strong>Are the current members different from the initiating members?</strong></td>
<td><strong>What kind of programs/courses do students learn and on what type of equipment?</strong></td>
</tr>
<tr>
<td><strong>What activities/information does the association provide its membership?</strong></td>
<td><strong>What style of projects do the students work on?</strong></td>
</tr>
</tbody>
</table>
| **What is the average size of company?**  
**How many companies?** | **How many students in total attend the institution?** |
| **Where/how, do these companies find new hires?** | **How many students attend digital media specific programs?** |
| **How many companies in total does the association serve?** | **Where does the typical student live – in or outside the community?** |
| **What type of customers does the membership serve?** | **Is there professional support for these programs/courses?** |
| **Where do most of their customers originate?** | **Where does the professional support come from (community or outside the community,) and, what form does the support take? (Money, time, or donation of old equipment?)** |
| **What types of advertising and communication does the industry association do to:**  
• attract new companies to the region,  
• attract new customers to use companies from the region,  
• attract skilled professionals to the region, and,  
• lever existing marketing programs of current members. | **Ask for details about types of services offered by companies, and ask for introductions to companies.** |
<table>
<thead>
<tr>
<th>TASK</th>
<th>ACTION</th>
<th>DUE DATE</th>
<th>RESPONSIBILITY</th>
<th>RESULT</th>
</tr>
</thead>
<tbody>
<tr>
<td>inventory of assets investigation</td>
<td>Film Office canvass</td>
<td></td>
<td>Film Office, allegiance, allies, and partners</td>
<td></td>
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<tr>
<td>Baseline measure</td>
<td>Method of survey, Type of survey tool Service Provider</td>
<td></td>
<td>Film Office, allegiance, allies, and partners</td>
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<tr>
<td>Roundtable</td>
<td>Prepare agenda, List of attendees, contact and invite</td>
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<td>Host (Government body, film office or industry association)</td>
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<td></td>
<td>Prepare presentation materials including survey conclusions and PPT, Book room/Catering</td>
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<tr>
<td>Identify the goal(s)</td>
<td>Discussion</td>
<td></td>
<td>All roundtable attendees</td>
<td>Agreement</td>
</tr>
<tr>
<td>Identify work group</td>
<td>Volunteer</td>
<td></td>
<td>All roundtable attendees</td>
<td>Agreement</td>
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<tr>
<td>Devise a set of objectives</td>
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<td>Work Group</td>
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<td>Develop action steps</td>
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<tr>
<td>Included in the tasks:</td>
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<tr>
<td>How to identify new opportunities</td>
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<td>Marketing planning</td>
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<td>Branding</td>
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<td>Crisis</td>
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<td>Contingency planning</td>
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<td>Risk Management</td>
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<tr>
<td>Calculate Budget</td>
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<td>Design tracking process</td>
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<tr>
<td>Calculate Budget</td>
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<tr>
<td>Report progress to: Workgroup</td>
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<tr>
<td>Report progress to: roundtable attendees</td>
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SW/SLOT TABLES

Although the Master Class level assumes that attendees understand “Strengths, Weakness/Limitations, Opportunities, Threats” assessment, these tables review the SW/SLOT process. Assessing internal and external SW/LOTS before, during, and post planning process helps us identify shifts required to make our strategy dynamic and sustainable – long term. A well-rounded strategy examines the internal workings of the organization, as well as external SW/LOTS. Date all assessments to demonstrate activity towards the goal(s.)

<table>
<thead>
<tr>
<th>INTERNAL</th>
<th>STRENGTHS</th>
<th>WEAKNESSES LIMITATIONS</th>
<th>OPPORTUNITIES</th>
<th>THREATS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operational leadership</td>
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<td>Financial strength</td>
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<td>Capabilities</td>
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<td>Responsiveness of workforce</td>
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<tr>
<th>EXTERNAL</th>
<th>STRENGTHS</th>
<th>WEAKNESSES LIMITATIONS</th>
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<tr>
<td>Jurisdiction’s reputation</td>
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<td>Market share</td>
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<td>Jurisdiction’s ability to meet market needs</td>
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<td>Jurisdiction’s ability to meet market trends</td>
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<td>Value your Jurisdiction’s brings to the market</td>
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<td>Jurisdiction’s quality</td>
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<td>Customer service and support quality</td>
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<td>Quality /effectiveness of past marketing</td>
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<td>Cost of working in the jurisdiction</td>
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<td>Distribution/ Communication</td>
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<td>Geographic location</td>
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**ROUNDTABLE**

The subtext of the roundtable process is to demonstrate support by allies and partners, to your allegiance. Think about a blend of quantity – number of participants, and quality – those who make decisions and are able to commit immediately.

The roundtable process provides the opportunity to identify:
- the style of incentive program will best strengthen and build the entertainment industry,
- champions – in government, industry and community,
- lobby issues, and,
- target for implementation.

Who to invite:
This is an executive level event for senior level decision makers – those people who make decisions that directly affect the direction of the entities they work with; or those people who have influence over the decisions made.

The presentation of the proposal will include:
1. a visual overview (PowerPoint, keynote, video whatever you feel is the best method)
2. a one page summary fronting a detailed handout with an acknowledgements page, and,
3. an appendix of the research points measures and tracking, details of tax burden/ tax benefit ratio and any other calculations; such as the multiplier effect.

The discussions to identify the goal are the most important part of the roundtable; and these discussions will take the most amount of time. As we see in the appendix for the roundtable:
- 45 minutes will go to opening remarks, reviewing activities up until the round table,
- 45 minutes will go towards explaining the baseline measure,
- about 30 minutes will go to questions from the floor, open discussion.
- 15 minute coffee/ message check break
- 1.5 hour to introduce probing questions, and begin conversation
- 45 minute lunch break
- 1 hour breakout groups to identify the goal
- 1 hour present the finding of the breakout group
- 15 minute coffee/message check break
- 30 minutes finalize the goal
- 30 minutes nominate the work group
- 30 minutes schedule the work group and then next round table
- 15 minute thank you and closing remarks.

Before the end of the roundtable, we use the momentum of enthusiasm to:
- identify the collective goal: Where to focus our growth strategy,
- appoint a work group to develop the plan, and schedule the group’s one and only planning day,
- schedule the next roundtable to present that plan (within one month is doable; two at the outside)

agree to implement the plan with five business days of that round table. (This gives the workgroup up to two days to make revisions)
### ACTION STEPS DELEGATION TABLE

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<tr>
<th>Task</th>
<th>Action</th>
<th>Due date</th>
<th>Responsibility</th>
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PLANNING DOCUMENT

Identify the agreed goal(s):

I. ____________________________________________________________________________

II. ____________________________________________________________________________

III. ____________________________________________________________________________

1) Devised objectives:
   Objectives specify the measurable achievements over a timeframe. The objectives set up the criteria for the measure. The objectives set your milestones. “X” will happen by “Y” date.

2) Identified action steps:
   Action steps layout process, including oversight, and roles,
   i. what we are doing
   ii. how we are executing steps
   iii. who is responsible for which tasks,
   iv. how we will report progress on the tasks,
   v. How we brand, and advertise the jurisdiction
   vi. How we look for new opportunities – Marketing
   vii. How we communicate internally and externally
   viii. The contingency plan in the event that the plan doesn’t do what we thought it would
   ix. The risk managements and crisis communication plans, in the unlikely event, of an unlikely event

3) Calculate a budget

4) Determine how to track results
   Identify what to track and how often to track

5) Implement the plan
ACKNOWLEDGEMENTS

Work this detailed and extensive does not come together in such short time frame without direction and assistance from many truly gifted organizations and individuals.

My thanks to my colleagues from my former work places who exposed me to the thinking processes for business, project management, and, government policy and regulation that are the foundation of everything I do today.

My thanks and appreciation to those who continue to gift me with their expertise, time, and patience:

Carol Sutton, certified conflict resolution specialist and organizational development professional. Carol liberally shared her expertise to shape the relationship aspects of this textbook. I am truly fortunate to call Carol Sutton mentor and friend.

Mr. Jimmy Kim, government finance whiz, MS Excel wrangler and keen observer of emerging opportunities. Words cannot express my gratitude for Jimmy’s good nature and expertise with the multiplier effect and Excel; instead, I bow with respect in the presence of a master.

To the members of my personal board (my mastermind group) for their respective time and energy they contribute to our bi-monthly coaching sessions.

The insightful and much appreciated distractions of "The School of Thought" at the Beaumont Studios, in Vancouver, British Columbia. The Beaumont is one of the most prolific, self-supporting creative industries incubators I’ve had the pleasure to watch grow and thrive.

Yogi Carrie Sikman for designing a challenging yoga regime to get me out of my head while working out my writing kinks during this project. Carrie has changed the way I look at yoga and how I look at life, and I am forever grateful, Namaste.

And of course, to my sisters Karen and Susan who continue to be generous with their wit, wisdom, and understanding. Thank you.