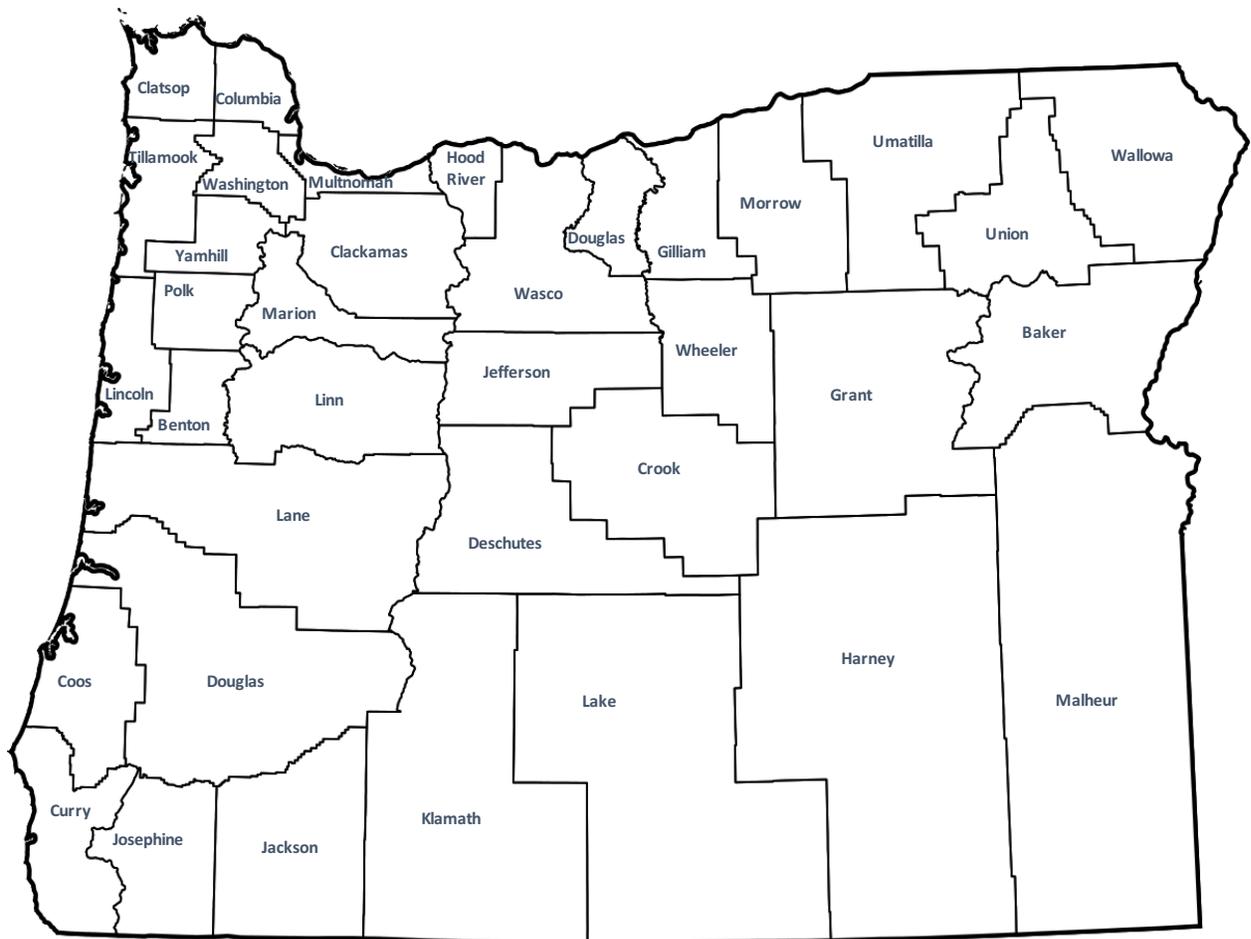


STRATEGIC ECONOMIC DEVELOPMENT PLANS IN THE STATE OF OREGON: PERCEPTIONS ON IMPACT AND ROBUSTNESS



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ABSTRACT

A clear gauge of current perceptions of professionals on the effectiveness and success of economic development planning allows for a more comprehensive discussion of the status of economic development planning in the State of Oregon. Oregon has continually lagged behind its coastal neighbors in the archetypal economic development metrics of job growth, wage growth, and lessening of unemployment. This project examines the perceptions of economic development professionals and elected officials gathered through a statewide survey. Perceptions help to determine robustness, effectiveness, and success of strategic economic development plans in the State of Oregon. This project also provides discussion for how the perceived positive impact of economic development can help improve strategic economic development planning.

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EXECUTIVE SUMMARY

The purpose of this project is to study and understand the perceptions of economic development professionals and elected officials on the impact and robustness of strategic economic development plans in the State of Oregon. This project is the result of a collaboration between myself, Bob Parker, the Community Service Center at the University of Oregon, the Economic Development Administration and a number of Statewide and Local Oregon partners. This executive summary provides an overview of the most important aspects of the project beginning with a history of strategic planning and its application the public sector, continuing with a discussion of the literature surrounding strategic planning, the research questions and methodology used, key terms, a short summary of the survey responses, and a discussion of the overall findings of the report.

A QUICK HISTORY REFRESHER

Strategic planning’s path to economic development in the public sector began with military use in the Ancient Greek period, moved to the private sphere in the early 1900s, and migrated to the public sphere in the 1960s. **Figure E.1** shows strategic planning’s path to economic development.

Figure E.1: A Quick History Refresher



Source: Kevin Gilbride, 2017.

The generals of the Greek armies discovered that war became a simpler enterprise when they focused on long term goals, ensuring that their troops were correctly located and supplying them with weapons and food, rather than short term actions such as individual skirmishes. History shows that the macro-level focus is a successful strategy for militaries due to the top down nature of their hierarchal systems. Strategic planning functions best when a defined hierarchy of decision making is established, as opposed to balancing multiple competing interests.

Strategic planning had many centuries of successful military use, and in the early 1900s the private sphere coopted it as a way to define the purpose and goals of businesses. In the post-World War I and World War II periods, large numbers of people trained by the military in strategic planning were discharged and entered the private sphere. Newly private citizens applied their military strategic training to the same top

down hierarchal leadership of private business. At the time, the single-minded nature to set a goal and accomplish it through strategic planning allowed for private industry to blossom.

Strategic planning's success in the military and private spheres was thought to be applicable to any industry or sphere, and therefore migrated to the public sector in the 1960s. The purpose was to apply the streamlined and effective planning methods that had shown success in these military and private spheres to local government to improve public sector planning operations. In other words, the purpose was to run government like a business. However, unlike the military and private spheres, public government has a horizontal hierarchy of leadership where multiple interests and needs must be balanced before decisions can be made, making the single-minded past of strategic planning a difficult application.

WHAT DOES THE LITERATURE SAY?

The difficulty in application of strategic planning to the public sector is supported by the literature surrounding the subject. Authors consider that the public sector's hierarchal system is not suited to the needs of strategic planning, when it is used governments do it wrong, and when governments get it right, they can't implement it.

● | STRATEGIC PLANNING IS BASED IN TOP DOWN HIERARCHAL POWER STRUCTURES (BOWER 1977).

In 1977, Joseph Bower questioned strategic planning's applicability to the public sphere in the Harvard Business Review, where he discussed strategic planning's origins in top down hierarchal structures and how that is not translatable to a horizontal hierarchal structure. Bower states that a local government must work with and integrate goals created by other unrelated organizations, must integrate the needs and desires of the public, and must balance those needs with what is politically feasible (Bower, 1977). The private and military spheres have no need for the balancing of needs.

● | STRATEGIC PLANNING IS A “NON-OPTIMAL” FORM OF PLANNING FOR MANY LOCAL GOVERNMENTS. (KWON, ET. AL.)

To further the consideration of strategic planning's inapplicability to the public sphere, in a study from Florida State University in 2004, authors Kwon, et. al. considered that strategic planning is a “**NON-OPTIMAL**” form of planning for many local governments (municipalities). The authors concur with Bower that local agencies must balance multiple interests, whereas the military and private spheres can be single-minded in their approaches. Kwon, et. al. also suggest that many municipalities adopt strategic planning solely out of “peer pressure” from their neighborhood region, and not because it is the best option. This leads to many municipal governments developing strategic plans that are based in competition, rather than what may be best for their constituencies. Kwon, et. al.'s study suggests strategic

economic development planning is best used in regional or larger government because it alleviates the concept of competition, allowing for local governments to focus on their strengths.

● LOCAL GOVERNMENTS DO IT WRONG (HALKETT AND STOLARICK)

Beyond strategic planning’s inapplicability, “The Great Divide,” an article published in Economic Development Quarterly by Halkett and Stolarick, outlines the disconnect between research and practice in the economic development sector. The authors state plainly that local governments just **DO IT WRONG**, i.e. government cannot implement strategic plans. The authors categorized academic research subjects from Economic Development Quarterly (EDQ) and compared them to current commonly implemented economic development strategies. Halkett and Stolarick found that practitioners focus on the short-term nature of politics when making strategic plans by implementing what it is politically palatable or has shown success in another community, often implementing strategies that have shown little to no evidence of success in communities other than their origin (such as tax abatement, target industries, or cluster zones). In contrast, academics in EDQ have the time (and luxury) to consider all outcomes, allowing them to place implementation strategies into contexts specific for communities.

There are efforts to offset the deficiencies that local governments face in strategic planning. Recent research from the Purdue Center for Regional Development and Ed Morrison focuses on the “strategic doing method.” Morrison advocates for strategic doing to focus on two main themes, “Where are we going?” and “How will we get there?” This transfers the impetus of planning from goals to implementation. However, as Halkett and Stolarick contend, it is unclear that strategic doing will have a large impact on the planning industry when practitioners have already shown an inability to follow the best practices established by academics.

RESEARCH QUESTIONS AND METHODOLOGY

The literature outlines three ways in which strategic planning is deficient in the public sphere; it is poorly suited to the public sphere due to a horizontal hierarchy of leadership, inadequately designed due to concepts of competition with neighbors, and poorly implemented. I designed three research questions to understand whether these stated deficiencies exist within strategic economic development planning in the State of Oregon.

1 | WHAT STRATEGIC ECONOMIC DEVELOPMENT PLANS EXIST IN THE STATE OF OREGON?

The purpose of my first research question is to understand whether Oregon planners use strategic planning in economic development. In order for the deficiencies in the literature to be addressed, I must first understand the methods used in Oregon. If governments do use strategic planning as a method, then:

2 | WHAT FOCUS DO COMMUNITIES PLACE ON IMPLEMENTATION FRAMEWORKS, EVALUATIVE METRICS, AND PLANS FOR REVISION?

The purpose of my second research question is to understand if the deficiencies addressed by the literature exist in planning in Oregon. Morrison, Halkett and Stolarick all consider that governments do not use strategic planning effectively due to their focus on goals rather than implementation strategies, evaluative metrics, and plans for revision.

3 | HOW DO PROFESSIONALS AND ELECTED OFFICIALS PERCEIVE THE IMPACT OF STRATEGIC ECONOMIC DEVELOPMENT PLANNING?

The purpose of my third research question is to determine if current plans, despite the negative outlook provided by the literature, are perceived as having a positive impact in communities.

To answer my research questions, I worked in conjunction with Bob Parker, the Community Service Center, the Oregon Economic Development Association, and a number of other statewide partners to administer a statewide survey to economic development professionals and elected officials. The survey provided qualitative and quantitative data of the perceptions of respondents on the current state of economic development planning.

My analysis of survey responses is based in two methods; a qualitative analysis of survey responses to determine the existence, focus, and perception (by professionals and elected officials) of implementation strategies and evaluative metrics; and, a quantitative analysis of survey responses, including cross tabulation and chi-square analyses to determine the importance and applicability of survey responses.

A chi-square analysis is a test used to determine the statistical significance of cross tabulated data sets. Significance is measured in a percentage of chance that the variables could be independent of one another. A general rule of thumb used by researchers is to maintain a 10% or lower chance that variables could be independent. To be more secure, I held statistical significance of variables to a 5% chance throughout my work. Unless otherwise stated in this executive summary, all presented data holds to a 5% chance or smaller of the variables being independent.

KEY TERMS

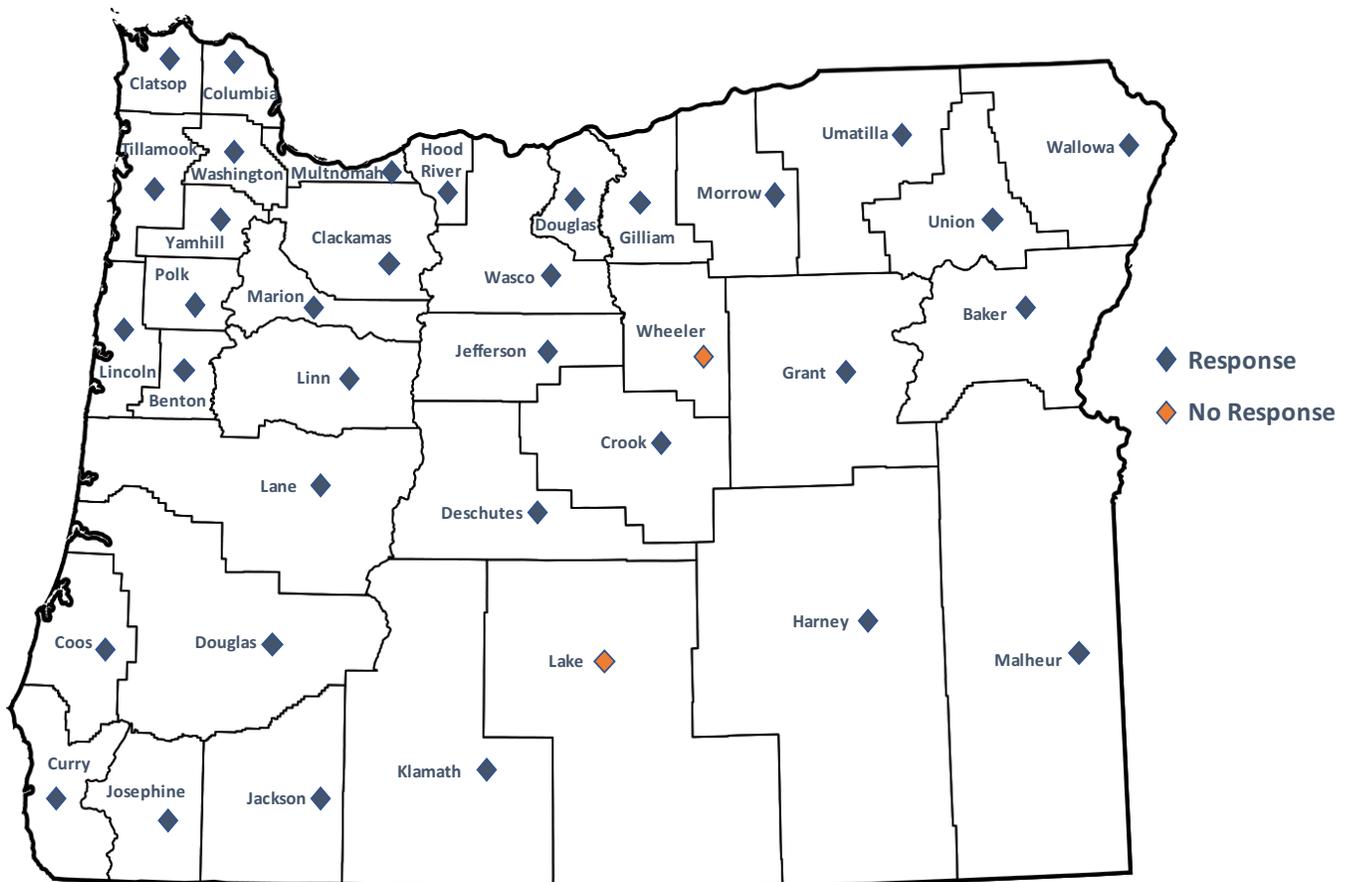
Before entering into the discussion of survey results and the findings produced from my methodology, some key terms must be defined:

 **OREGON STATEWIDE PLANNING GOAL 9:** REQUIRES MUNICIPALITIES TO INVENTORY COMMERCIAL AND INDUSTRIAL LANDS, ANALYZE THE CURRENT ECONOMIC CLIMATE, AND ASSESS THEIR COMMUNITY'S POTENTIAL FOR ECONOMIC DEVELOPMENT

- **PLAN ROBUSTNESS:** DESCRIBES THE EXTENSION OF COMMUNITY’S ECONOMIC DEVELOPMENT PLANS BEYOND THE REQUIREMENTS OF GOAL 9 (IMPLEMENTATION FRAMEWORKS, EVALUATIVE METRICS, PROCESS FOR REVISION)
- **UNGATED/GATED:** DESCRIBES SURVEY RESPONSES THAT ARE NOT LINKED TO RESPONSES REGARDING GOAL 9 PLAN EXTENSION (UNGATED), OR ARE DIRECTLY LINKED TO GOAL 9 RESPONSES (GATED)

CHARACTERISTICS OF SURVEY RESPONDENTS

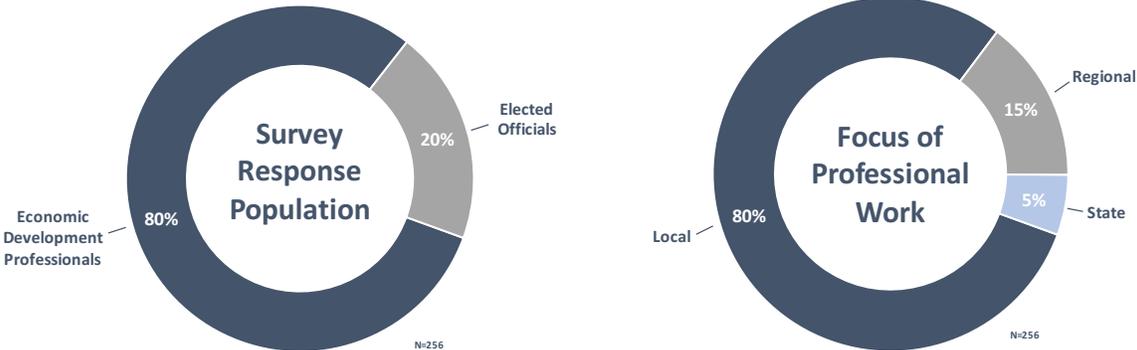
Thanks to the reputation of my partners for this research, I received 302 responses to the survey, with about 260 completed responses. The responses represent 34 of the 36 counties in Oregon.



Source: Kevin Gilbride, 2017.

Figure E.2 shows the distribution of the survey response population and the focus of the professional work engaged in by respondents.

Figure E.2: Characteristics of Respondents



Source: Community Service Center, 2017.

Of the completed surveys, 80% of the respondents represented professional economic development ventures, which include: local governments, economic development organizations, nonprofits, and a few others. 20% of the respondents were elected officials, the majority of whom are mayors of Oregon cities and towns.

The focus of professional work represented by respondents is 80% local work (which can be categorized as municipal, metro areas, or in some cases counties), 15% regional work (which can be categorized as counties, or regional economic development agencies like Cascades West or Lane Council of Governments), and 5% state work (which can be categorized as organizations like OEDA, Business Oregon, or League of Oregon Cities).

CHARACTERISTICS OF EXISTING PLANS

To answer my first and second research questions, my survey asked respondents if their community plans beyond Statewide Planning Goal 9 requirements, whether their community’s plan includes evaluative metrics, and whether their community’s plan includes a specific implementation framework.

The question of planning beyond Goal 9 requirements is important because it is a minimum threshold for planning for economic development in Oregon. If a community plans beyond it, they can be considered to have a higher level of commitment than a neighbor who does not. Seventy-one percent of respondents said that their community plans beyond Goal 9 requirements. This demonstrates that the majority of communities in Oregon engage in some form of strategic planning in economic development.

71%
SAY THEIR COMMUNITY
PLANS BEYOND GOAL 9
REQUIREMENTS.

In regard to whether their community’s plan include evaluative metrics, or a specific framework for implementation, most respondents indicated that they did not. Thirty-nine percent of respondents indicated that their community’s plan includes evaluative metrics, and 34% indicated that their

community included a specific framework for implementation. This reasserts the deficiencies addressed by Morrison, Halkett and Stolarick, that when communities do use strategic planning in economic development, most do it wrong.

Figure E.3 shows the perceptions of respondents on the effectiveness and success of their current economic development strategies.

Figure E.3: Impact of Existing Economic Development Strategies. (Ungated)



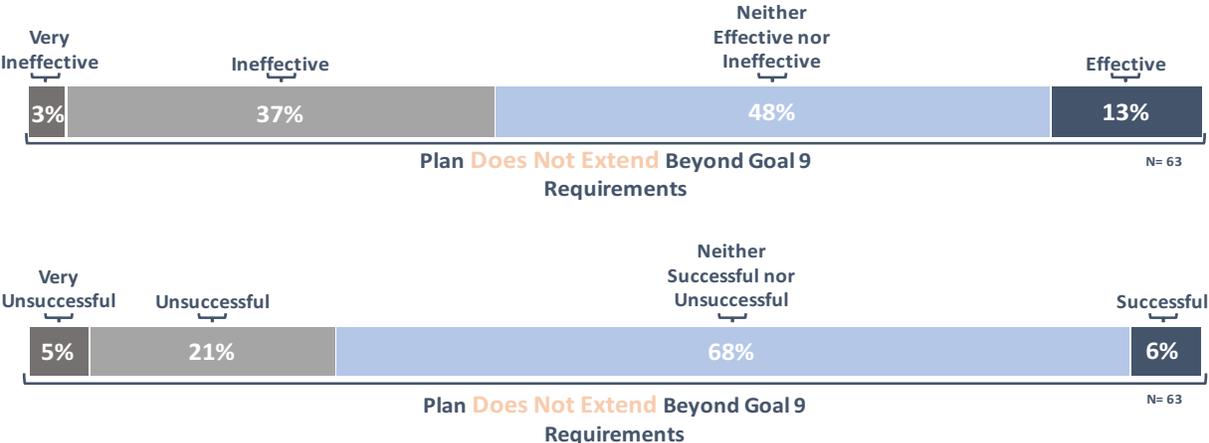
Source: Community Service Center, 2017.

A qualitative analysis of survey responses shows that existing economic development plans are perceived to have little positive impact on their communities. Of **ungated** respondents, less than 50% consider their community’s plan to be effective, and less than 40% consider their community’s plan to be a success.

IMPACT OF GOAL 9 REQUIREMENTS

Ungated survey responses show that meeting Statewide Planning Goal 9 economic development efforts in communities is perceived to have little positive impact. **Figure E.4** shows the overwhelming evidence that if a community makes the minimum efforts toward economic development, no progress will be seen.

Figure E.4: Meeting Goal 9 is perceived to Have Little Impact. (Ungated)



Source: Community Service Center, 2017.

In contrast to communities who make no effort beyond Goal 9 requirements, the extension of a plan beyond Goal 9 requirements increases the positive perception of economic development plan impact. **Figure E.5** starkly demonstrates the contrast to **Figure E.4**.

Figure E.5: Extending Beyond Goal 9 Increases the Positive Perception of Impact. (Ungated)



Source: Community Service Center, 2017.

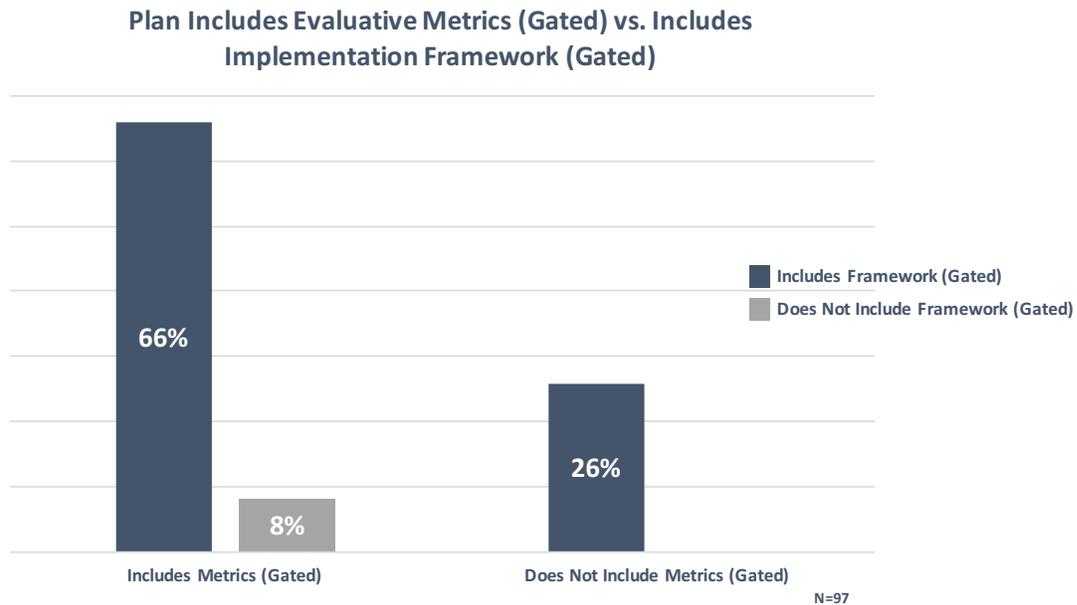
CORRELATIONS IN PLAN ROBUSTNESS

To further address my second research question, on the focus that communities place on implementation frameworks, evaluative metrics, and plans for revision, my survey asked respondents who indicated that their community plans beyond Goal 9 if their plan also includes these elements. Responses demonstrate that communities who plan beyond Goal 9 requirements also have a higher rate of inclusion of robust plan elements. In other words, in contrast to the findings of Morrison, Halkett and Stolarick, while communities who do engage in strategic planning **do it wrong**, most communities in Oregon are **doing it right**.



Of the **gated** respondents, 46% said that their plans have both robust elements (this number is calculated by cross tabulating the responses to the two questions asking whether plans include implementation plans or evaluative metrics). The 46% of plans is an important finding because if you remove the respondents from the pool who said that they have neither an implementation plan or an evaluative metric, the correlation in plan robustness is evident. Demonstrated in **Figure E.6**, communities that already have a single robust plan element are more likely to have more.

Figure E.6: Correlations in Plan Robustness. (Gated)

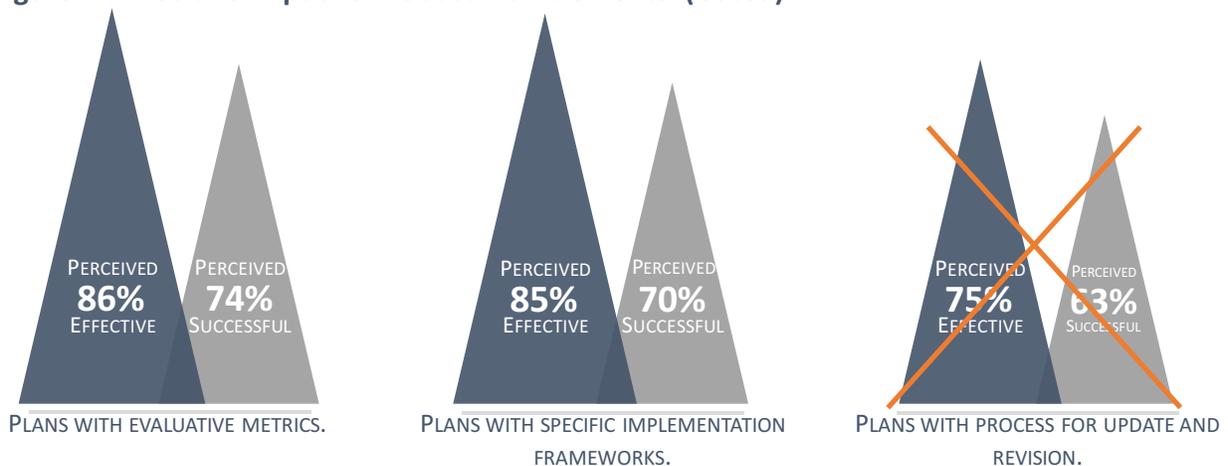


Source: Community Service Center, 2017.

POSITIVE PERCEPTIONS OF ROBUST PLAN ELEMENTS

To address my third research question, the perceptions of economic development professionals and elected officials on the impact of strategic economic development planning, my survey asked respondents to indicate the effectiveness and success of their community’s plans. To understand how the perceptions of respondents related to different robust plan elements, I cross tabulated responses to multiple questions. In every case, the inclusion of robust plan elements in strategic economic development plans for communities positively correlates with respondent perceptions of the impact of plans. **Figure E.7** demonstrates this case.

Figure E.7: Positive Impact of Robust Plan Elements. (Gated)



Source: Community Service Center, 2017.

The cross tabulation of perceived effectiveness, perceived success, and the inclusion of a process for update and revision of plans is the only case in my research in which the chi-square analysis showed an unacceptable chance of independent variables. In this case, the cross tabulation of effectiveness and updates showed a nearly 10% chance of independent variables, and cross tabulation of success and updates showed a 40% chance of independent variables.

Qualitatively, the cross tabulation in this case shows that strategic economic development planning is perceived to have a positive impact in communities. Quantitatively, the cross tabulation shows that some robust plan elements are directly related to the effectiveness and success of plans, and the relationship of others is in question at this time.

SUMMARY OF KEY FINDINGS

The findings of my research in relation to the literature and my research questions are as follows:

- 1 | INADEQUACIES ADDRESSED BY LITERATURE DO EXIST:** MOST COMMUNITIES HAVE: NO IMPLEMENTATION PLANS, NO EVALUATIVE METRICS, NO PLANS FOR REVISION. HORIZONTAL HIERARCHY.
- 2 | EXTENSION BEYOND GOAL 9:** ANY EXTENSION OF COMMUNITY ECONOMIC DEVELOPMENT PLANS BEYOND GOAL 9 REQUIREMENTS INCREASES THE PERCEPTION OF POSITIVE IMPACT.
- 3 | CORRELATIONS IN PLAN ROBUSTNESS:** COMMUNITIES THAT ALREADY HAVE A ROBUST PLAN ELEMENT ARE MORE LIKELY TO HAVE MORE.
- 4 | POSITIVE IMPACT OF INCREASED PLAN ROBUSTNESS:** ROBUST PLANS ARE PERCEIVED TO HAVE A POSITIVE IMPACT ON ECONOMIC DEVELOPMENT FOR COMMUNITIES.

INTRODUCTION

In an economic system based on rewarding those who are already successful, economic development is the life blood of every community. The worst-case scenario for a community in an economic environment like ours is stagnation. Without continual economic growth in communities, stagnation leads to job loss, wage loss, and eventual loss of private investment in the community. Without these key aspects of economic development, communities can fall into disrepair becoming ever less desirable for investment, creating a spiral of tax base loss, crumbling infrastructure, and the downfall of once vibrant communities. But how do we, as planners, curb community economic collapse? One argument is for strategic economic development planning.

Despite the dark potentialities of economic stagnation, strategic economic development planning is a controversial topic in the planning world. Does strategic planning work, or is it a waste of tax dollars? Normally, in planning it is difficult to gauge the impact of efforts in communities. Old metrics of job growth, wage growth, and number of businesses attracted only tell part of the story of impact; these metrics ignore perception. Perception is important because, for example, quantitative metrics may tell a story of overall job loss in a community, perhaps from the closing of a big box store, but they don't describe the four new entrepreneurial ventures that opened to fill the void left by the closed big box.

However, when gauging the perceptions of those involved in economic development, one loud voice can often drown out all others. For this reason, it is necessary to gather a large swathe of data on professional perceptions of economic development efforts. In partnership with the Economic Development Administration and the Community Service Center, Bob Parker and I designed a survey to understand the perceptions of economic development professionals and elected officials on the impact of strategic economic development planning in the State of Oregon. The survey allows for qualitative and quantitative analysis of the perceptions of those who work in economic development, allowing for a more comprehensive understanding of the topic, undistorted by a single loud voice.

The analysis provided by this project provides a preliminary argument for strategic economic development planning's overall positive impact for communities.

THIS REPORT

I have divided my analysis of the perceptions of economic development professionals into eight parts: Context, Methodology, Characteristics of Respondents, Summary of Key Survey Responses, Key Findings Sections I, II, and III, and Discussion of Findings.

Part I: Context, outlines strategic planning's military origin and its subsequent implementations in the private and public spheres. Part I summarizes strategic planning's application to the public sector, its implementation and impact in Oregon, and the efficacy and implementation of strategic plans in economic development.

Part II: Methodology, describes the data collection and analysis process used for this project. Part II summarizes the methodology used to develop the survey (the primary source for data used in this project), and the qualitative and quantitative methods used for survey analysis.

Part III: Characteristics of Respondents, describes the demographics of survey respondents, including the areas of Oregon represented in the survey, the organizations represented by respondents, and survey respondent's level of activity in economic development.

Part IV: Summary of Key Survey Responses, serves as a qualitative summary of key survey questions to this project. This section outlines professional's perceptions of the effectiveness and success of current strategies, the characteristics and elements of plans, and frequency of plan update or revision.

Part V: Key Findings Section I, summarizes key findings on the perception of economic development professionals and elected officials. This section provides a comparison, using cross-tabulation and chi-square analysis, of the perceptions of economic development professionals and elected officials. Topics covered: perceptions of the success of economic development in the State of Oregon, perceptions of the effectiveness of economic development, and respondent's knowledge of plan robustness.

Part VI: Key Findings Section II, summarizes key findings on the robustness of economic development plans. This section uses cross-tabulation and chi-square analyses to determine the proportion of respondents who indicated that their community's plan includes implementation frameworks or evaluative metrics.

Part VII: Key Findings Section III, summarizes key findings on the perception of survey respondents who indicated that their community's economic development plans extend beyond Statewide Planning Goal 9 regulations. This section addresses whether there is a correlation between the existence of implementation guidance, evaluative metrics, or revision processes and the success or effectiveness of plans.

Part VIII: Discussion of Findings, provides a discussion of the overall findings of the project including: the importance of plan extension beyond Goal 9, the positive impact of increased plan robustness, correlations in plan robustness, and considerations for further study.

There is a plethora of academic literature involving the concepts of strategic planning, economic development, and all the theories and methods involved. This review of literature focuses on (1) the history of strategic planning (from military adoption to private sector development), (2) strategic planning's application to the public sector, specifically in economic development, (3) the application of strategic planning to economic development in the State of Oregon, (4) the efficacy of strategic plans in achieving proposed outcomes, and (5) implementation frameworks associated with strategic plans. The literature review demonstrates the lack of research focused on the efficacy and implementation of strategic plans. This is the gap in literature to which the research presented is intended to contribute.

ORIGIN OF STRATEGIC PLANNING

Strategic planning began as a military concept in the classic Greek era (the 5th and 4th centuries BC), as a method of focusing on the larger scale of military management. Strategic planning occurred before engagement with the "enemy." Generals focused on supply lines, the number, type and location of troops, rather than focusing on small scale tactical management. The strategic planning process at the military level focused on a top down approach, to match the hierarchy of the military, where the highest echelons of the power structure engaged in the planning process and disseminated the information down through the hierarchy, allowing lower ranking officials to base their tactical decisions on the overall strategic plan. Implementation in strategic planning is considered a separate process altogether, to be engaged in after the strategic planning process (Wall and Wall 1995).

In strategic planning, the "focus is on results or outcomes rather than products or outputs. Strategic planning is less concerned with how to achieve outcomes than with defining what those outcomes should be" (Armed Forces Comptroller). Over time, strategic planning graduated from military use to private sector (business) use. A logical explanation for the migration of strategic planning is the post World War I influx of people trained in military strategic methods into the academic and private spheres.

The Harvard Policy Model, originally taught in Harvard Business school courses in the 1920s, applied strategic planning to the private sphere. The model's purpose was to define a private company's mission and its business as it pertains to its environment or ecosystem (nearly a direct corollary to establishing supply lines and positioning troops). The Harvard policy model also established the strengths, weaknesses, opportunities, threats analysis (SWOT) method commonly used in strategic planning today. The policy model, however, provided only guidelines for establishing a strategic presence for private businesses, but did not provide a description of how to develop strategies (Barnat 2014). The problems faced in early adoption of strategic planning by private companies were in its "failure to create a company climate congenial to planning, overemphasis on formality in the system thus reducing flexibility, and failure to develop goals suitable as a basis for formulating long-range plans (Steiner 1972)."

Instability in the modern economy, due to many factors (ex: shifting brand loyalty, speed of consumer change due to globalization), has placed traditional strategic planning in the private sector on its head. As

described by Wall and Wall in their 1995 work, "The Evolution (not the death) of strategy," the traditional strictly top down hierarchical structures of private industry are hamstrung in an instable environment. Strategic planning in a strict hierarchy is based on an economic environment that shifts slowly, allowing for corresponding slow corrections by the hierarchy. In response to the modern shift to instability, private industry has shifted governing hierarchies from a top down structure to a horizontal or network structure. Horizontal structures in strategic planning integrate the ideas and opinions of employees of all levels within the organization based on the notion that ground level employees have a better understanding of the shifting environment.

APPLICATION IN THE PUBLIC SECTOR

Strategic planning is a piece of a larger framework of public sector planning. Public sector planning makes use of many different methods: rational-comprehensive, incremental, advocacy, implementation-oriented, strategic, transactive, negotiative, and communicative (Innes 1995).

In relation to its application militarily and in private business, strategic planning is new to the public sector (Bloom 1986). Strategic planning migrated from the private sector to the public sector in the 1960s with the purpose of applying the streamlined and effective military and private sector strategic planning methods to improve public sector planning operations. The traditional top down structure of strategic planning adds difficulty in application to the horizontal structure of public government. Literature discusses the applicability of private sector practices to the public sector, considering that public sectors are not as insular as the private apparatus. In comparison, a traditional top down private sector business can produce a strategic plan based solely on the needs of the business and assign duties down through the hierarchy. Whereas, a local government must work with and integrate goals created by other unrelated organizations, must integrate the needs and desires of the public, and usually has a horizontal hierarchical structure. Horizontal hierarchical structures are common between public agencies engaged in the strategic planning process (Bower, 1977).

Authors also note the inapplicability of private sector style strategic planning as a general government planning method due to the dissimilarities between governmental structure and military/private industry structure. George Steiner, in his work "Strategic Planning," notes that in the public sector, political factors and the needs of interest groups take precedence over things like economic factors. The opposite is generally true of the private sector, where the focus is on revenue and profit. Steiner also considers the differences of public and private sector management to be incompatible in strategic planning, considering that strategic planning is only applicable in the public sphere, where an organization's structure is most like that of a business, such as public utilities (Steiner, 1979). A study by faculty at Florida State University, Kwon et. al., concludes that strategic planning in economic development is a "non-optimal" form of planning for many municipal governments. Kwon, et. al. suggest that many municipalities adopt strategic planning solely out of "peer pressure" from their neighborhood region and not because it is the best option. This leads to many municipal governments developing strategic plans that are based in competition, rather than what may be best for their constituencies. Kwon, et. al.'s study suggests strategic economic development planning is best used in regional or larger government.

Though some literature suggests questionable applicability of strategic planning to the public sector, Kwon et. al. suggests that the adoption of strategic planning in the sphere of economic development is an innovation that can help local governments to work successfully with the complicated networks and entities involved in the implementation of economic development policies. Their research further concludes that the use of strategic economic development plans is most often influenced by “competition [if neighbors have strategic plans, then why don’t we], legitimacy [to the constituency], business influence, and peer pressure in the neighborhood region.”

The Federal and Oregon State governments promote and support the development of strategic plans, particularly comprehensive economic development strategies. Federal support for strategic planning in economic development comes through the Public Works and Economic Development Act of 1965, specifically in Section 302. Section 302 outlines Federal governmental assistance to regions for the development of a Comprehensive Economic Development Strategy, including technical and monetary assistance. Through the Economic Development Administration (EDA), the Federal Government suggests that any planning organization that is seeking a regional economic development program should also develop a Comprehensive Economic Development Strategy (CEDs).

APPLICATION AND IMPACT OF STRATEGIC ECONOMIC DEVELOPMENT PLANS IN OREGON

Oregon supports the development of strategic economic development plans through its 19 Statewide Planning Goals, specifically Goal 9 (Economy), and OAR 660-009 (the administrative rule that implements Goal 9). Oregon requires that all local governments must develop a comprehensive land use plan that addresses all the applicable statewide planning goals for their constituencies. Every local government, as per requirements of Goal 9, must address economic development within their comprehensive plans (State of Oregon). OAR 660-009 requires that every jurisdiction engage in an economic opportunity analysis that reviews local, county, state, regional and national economic trends. As per OAR 660-009-0020, each municipality must inventory commercial and industrial lands, and assess their community’s economic potential. The analysis provides a framework for municipalities to base their strategic economic development plans.

Planning in Oregon is traditionally separated by what works in urban areas and what works in rural areas. In the past, Oregon’s economy focused on the natural resource extraction economies of lumber, farming, mining, and in the coastal areas, fish (Young, 2016). Due to the impacts of the 1980s recession, Oregon began to focus on diversification of the economy through integration of newer industries, such as high technology. Now, with the increasing awareness of global climate change, and the effects of the Great Recession, Oregon is focusing on an economy integrating sustainable industries and principles (Oregon State Archives, 2013). However, the new high-tech and sustainable focus is focused almost exclusively around urban centers, like Portland and Eugene, while the rural areas, like Coos Bay or Hermiston, continue to depend on resource extraction driven economies. This general bifurcation of industry by Oregon’s regions, where urban centers are diversified and rural centers are not, is especially important when considering the definitions of economic development presented earlier.

The 1980s-lumber recession forced Oregon to reevaluate its focus on extractive industries, and to plan proactively for future economic development (Kissler, et. al.). Governor Neil Goldschmidt initiated a classic top-down statewide strategic planning process to develop a new economic development strategy for the State of Oregon. Called “Oregon Shines,” the plan laid out goals and benchmarks for the state to focus economic development strategies. The plan helped Oregon begin the process of economic diversification, to better withstand future economic environmental stresses. Oregon Shines provided hundreds of specific goals, recommendations, and benchmarks that are credited with helping Oregon avoid participation in the 1991 national recession. By 1995, industry in the state “was more diversified, unemployment was at historic lows, and population growth was twice the national average (Kissler, et. al.).

In 1996, Governor John Kitzhaber initiated an update of the statewide strategic plan, called “Oregon Shines II.” Oregon Shines II followed the previously referenced private model for strategic planning of bottom up involvement (Wall and Wall), to provide goals for Oregon’s economic development. Although the 91 benchmarks set by Oregon Shines still exist, Oregon Shines II moved away from the specific benchmarks tactics of the original Oregon Shines, to provide broad recommendations (such as “quality jobs for all Oregonians”) (Kissler and Tyrens). The early success of the two Oregon Shines development strategies supports Kwon et. al.’s conclusion of strategic planning’s best use at higher levels of government.

However, success requires continued commitment from government at all levels and Oregon has not update the Oregon Shines model since 1996. Despite early success, Oregon’s economy remains largely undiversified, with the three largest industries being timber production, agriculture and high technology manufacturing. Research concluded on Oregon’s economic climate traditionally places Oregon as one of the lowest performing states in the United States, with lower median incomes, higher unemployment and underemployment rates, and an undiversified economy (Young, 2016).

A review of municipalities in Oregon shows that most larger towns and cities, municipalities with populations greater than 50,000 (Tigard, Albany, Corvallis, Springfield, Medford, Bend, Beaverton, Hillsboro, Gresham, Eugene, Salem, and Portland), use strategic plans to guide economic development. Plan are either city specific or region specific, depending on the size and location of the city. For example, Portland has a city specific strategic plan and Eugene-Springfield uses a regional plan.

EFFICACY AND IMPLEMENTATION OF STRATEGIC PLANS

As demonstrated by this literature review, professionals and academics alike argue whether strategic planning is applicable to the public sector. One thing is for sure, however, strategic planning is part of the planning process, so the question becomes, how to make it more effective? In her essay “The Pitfalls of Planning,” Arlene Goldbard states “the main pitfall of planning - the one from which all others derive - is falling into the delusion that planning can determine outcome.” Without due focus on outcomes, plans can become a list of generalities and vagaries devoid of meaning. The problem facing implementation in the public sector is the lack of a unified planning and management structure (many different agencies and political agendas are represented in the planning process), which leads to a failure to address key issues (due to political necessity) and an insufficient commitment to ensure implementation (Bloom). Another

problem facing implementation is the complexity of issues addressed in public planning, each issue can have multiple facets, making it difficult for public agencies to define criteria by which to evaluate alternatives (Rondinelli).

In conjunction with the difficulty of defining evaluative criteria, public agencies also face difficulty in choosing implementation strategies that will be successful in their specific community. “The Great Divide,” an article by Halkett and Stolarick, outlines the disconnect between research and practice in the economic development sector. The authors categorized academic research subjects from Economic Development Quarterly (EDQ) and compared them to current commonly implemented economic development strategies. Halkett and Stolarick found that practitioners focus on the short-term nature of politics when making strategic plans by implementing what it is politically palatable or has shown success in another community, often implementing strategies that have shown little to no evidence of success in communities other than their origin (such as tax abatement, target industries, or cluster zones). In contrast, academics in EDQ have the time (and luxury) to consider all outcomes, allowing them to place implementation strategies into context specific for communities.

Just as implementation differs between spheres, so too does evaluation. In a general sense, academics agree that there is a gap between evaluation theory and practice (Khakee 2003, Oliveira, Pinho 2010). Akin to implementation, the difference between spheres seems to be based in resource allocation, practicing planners must spend most their time and funds reviewing and facilitating development proposals (Seasons 2003). Research argues that, for evaluation to be effective, the evaluator must be a member of the planning team, and the process for evaluation must have been decided by the planning team as well (Lichfield 2001). But without sufficient funding or time, this cannot be the case.

In response to the need for strategic economic development plans to include implementation plans and evaluative measures, the Department of Commerce - Economic Development Administration created a Summary of Requirements for comprehensive economic development strategies. Strategies should consist of seven steps:

1. **Background** – Overview of the economic development situation of the region, including population, geography, workforce development, transportation access, resources, environment, and other pertinent information.
2. **Analysis of Economic Development Problems and Opportunities** – In-depth analysis of economic development strengths, opportunities, weaknesses, and threats in the region.
3. **Goals and Objectives, Defining Expectations** – Broad goals based in regional expectations, specific objectives (clearly measurable, accomplishable in five-year time frame).
4. **Community and Private Sector Participation** – Address the relationship between community and private sector.
5. **Strategic Projects, Programs and Activities** – Identify projects, programs and activities that are designed to implement the Goals and Objectives.
6. **Plan of Action** – Implementation plan for goals and objectives.
7. **Performance Measures** – List of measures used to evaluate the success and implementation of the economic development strategy (USDC - EDA, 2017).

The first five steps to the process above were addressed previously in this literature review through the military and private industry's strategic planning methods. Traditionally, as Wall and Wall made clear in 1995, steps six and seven, of plan implementation and evaluation, were considered a separate process. The Economic Development Administration (EDA) makes clear in their summary that this is no longer the case. Despite the EDA's requirements, a review of municipalities in Oregon with populations greater than 50,000 shows that the emphasis of strategic plans is placed on goals and objectives rather than specific implementation plans, or evaluative measures.

Recent academic research from the Purdue Center for Regional Development focuses on "Strategic Doing," a process developed by Ed Morrison. Morrison contends that the failure of strategic plans in economic development goes beyond the general idea that they are created and then left on a shelf, due to just being a bunch of goals. Morrison's criticism focuses on the origin of strategic plans, the Army, and where their popularity stems from, the business industry. As addressed previously in this review, the environment of success in these industries was one in which a strict hierarchy of duties exists. In the realm of public policy, a strict hierarchy of individuals does not exist in the same way, Morrison describes it as no one having the capability to tell another person what to do. This environment directly hinders the strict hierarchy required to execute a strategic plan. To alleviate the hierarchical issue, Morrison advocates for strategic doing to focus on two main themes, "Where are we going? And How will we get there?" This transfers the impetus of planning from goals to implementation.

Overall, as made clear by Khakee, and Halkett and Skolarick, literature shows that there is a disconnect between planning literature and guiding processes, and the public strategic planning process. The literature argues for the inclusion and emphasis of implementation plans and evaluative measurements for strategic plans, but, whether due to lack of funding or other resources, strategic economic development in practice often includes neither.

SUMMARY

In this review of literature, I did not discover any study of implementation practices or evaluative measurements for strategic economic development plans in the State of Oregon. Through this review of available literature, it is evident that an analysis of current and future strategic economic development is necessary to discover and understand the disconnect between literature and practice.

PART II – METHODOLOGY

For the purposes of this study on strategic economic development plans in the State of Oregon, I have developed a mixed methods research process including:

- a statewide survey sent to economic development professionals and elected officials;
- a qualitative analysis of survey responses to determine the existence, focus, and perception (by professionals) of implementation strategies and evaluative metrics;
- and, a quantitative analysis of survey responses, including cross tabulation and chi-square analyses to determine the importance and applicability of survey responses.

This section provides an outline of the survey process and the evaluative methods used for the statistical analysis of survey results.

SURVEY METHODOLOGY

To determine the existence and efficacy of strategic implementation plans, I worked with the Community Service Center to develop and conduct a survey of professionals who work in economic development across the State of Oregon. The 35-question survey was administered through Qualtrics, an online survey hosting site, to a wide range of economic development professionals and elected officials. The range included members of the Oregon Economic Development Association (OEDA), League of Oregon Cities, Oregon Economic Development Districts (EDDs), Association of Oregon Counties (AOC), members of Business Oregon, and general City employees. The questions were broken into eight sections, which sought to summarize:

1. the importance of economic development in different organizations and regions;
2. the existence of current plans and strategies for economic development;
3. the effectiveness of existing plans;
4. the level of networking, coordination, cooperation, collaboration, and integration of plans between agencies;
5. the existing barriers and assets for economic development;
6. the needs of communities for economic development;
7. the level of economic resilience in communities;
8. and, the characteristics of respondents.

The survey asked respondents to reply based on their own expertise and perceptions of economic development in their communities. The relevant sections of the survey for the research presented in this paper are **Sections 2 and 3**, of which most questions were in relation to the existence and efficacy of strategic economic development plans and their inclusion of implementation frameworks, evaluative metrics for success, or plans for revision.

The survey was administered to a total of about 600 individuals and was available for a five-week period from the last week of February to the first week of April. In total, we recorded 302 responses, with 212 completed surveys, which equated to a 50% response rate and 36% completion rate.

METHODOLOGY OF SURVEY ANALYSIS

To understand and evaluate the perceptions of survey respondents I engaged in a mixed-methods approach of data analysis. The process included:

- a qualitative analysis of survey responses to determine the existence, focus, and perception (by professionals) of implementation strategies and evaluative metrics,
- and, a quantitative analysis of survey responses, including cross tabulation and chi-square analyses to determine the importance and applicability of survey responses.

QUANTITATIVE METHODS

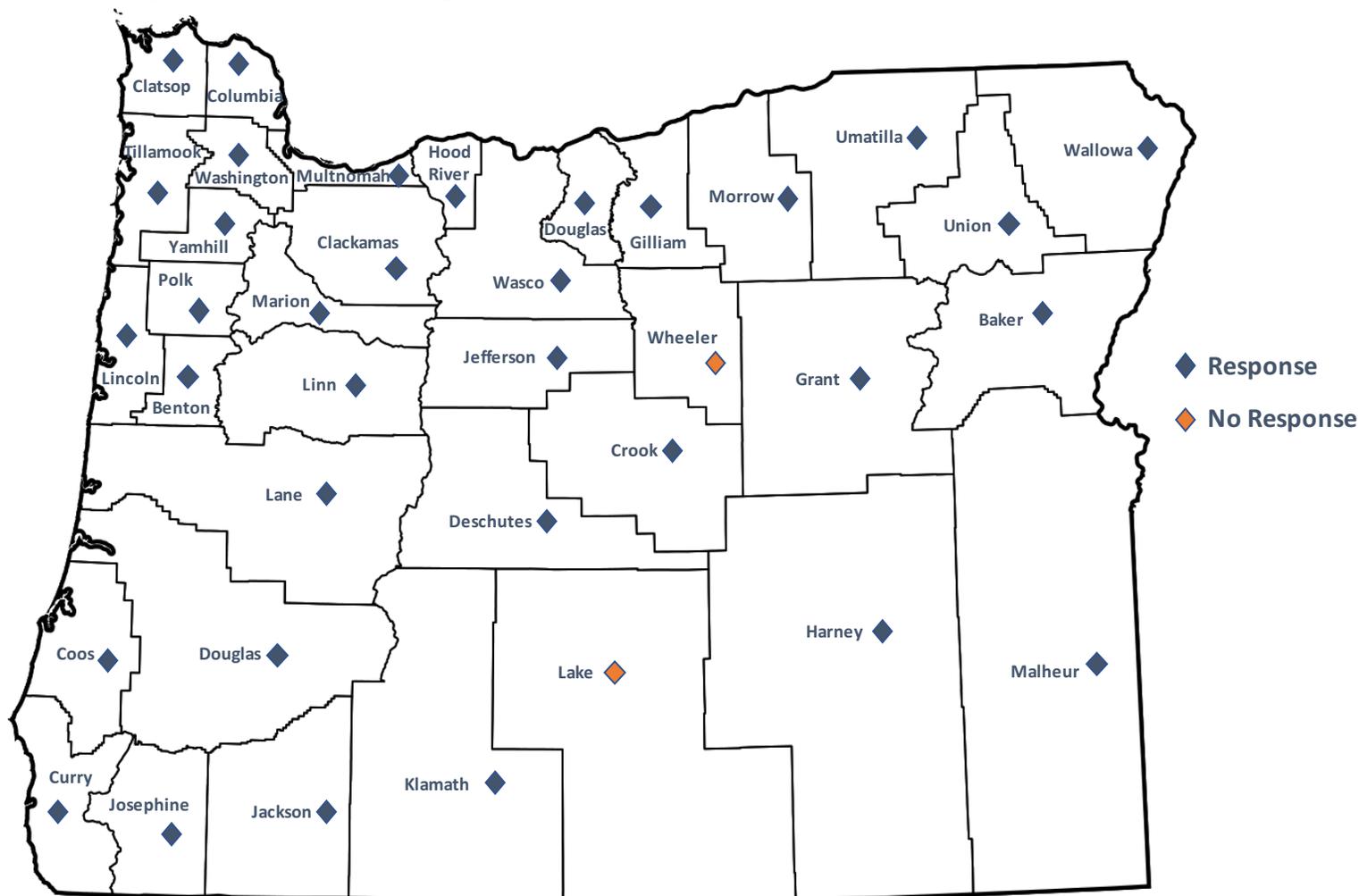
To evaluate the perceptions of survey respondents, I engaged in a series of comparisons of survey questions using cross tabulation and chi square analysis. Cross tabulation, in the case of this research, refers to the comparison of two survey question responses. The results of this analysis show the number of correlated responses. For example, in the case of two questions with “Yes” or “No” answers, a four-cell table is generated to show the number of respondents who indicated “Yes” to both questions, “Yes” to the first question and “No” to the second, “No” to the first question and “Yes” to the second, and “No” to both questions. Cross tabulation allows for the researcher to visualize correlations between data sets.

To determine whether the visual correlation shown in cross-tabulated data sets is statistically relevant, researcher uses the chi-square statistic. According to Qualtrics, “the chi-square statistic is the primary statistic used for testing the statistical significance of the cross-tabulation table.” The statistic allows for a researcher to understand whether the two variables presented are **independent** or **dependent** of one another. Cross-tabulated data that presents **independent** variables is considered non-significant, requiring the researcher to declare a null hypothesis. **Dependent** variables are considered statistically significant. Chi-square is expressed as a probability value, or p-value, like “0.0322.” A value like this demonstrates a 3% chance that the variables represented in the cross-tabulation are **independent**, allowing the researcher to reject the null hypothesis. A researcher can adjust the level of scrutiny on their data set by lessening the chi-square threshold required to reject the null-hypothesis. For the purposes of this study, I hold the probability of variables being independent to a .05 or 5% level.

PART III – CHARACTERISTICS OF RESPONDENTS

The 302 responses can be characterized in several ways to provide a better understanding of the survey findings. First, the respondents are defined by their location. Of the 36 counties in Oregon, survey respondents represent 34 counties. The only counties not represented are Lake (South central Oregon) and Wheeler (North central Oregon) counties, two of the least populated counties in the state. The map in **Figure 3.1** shows each of the counties represented by the survey.

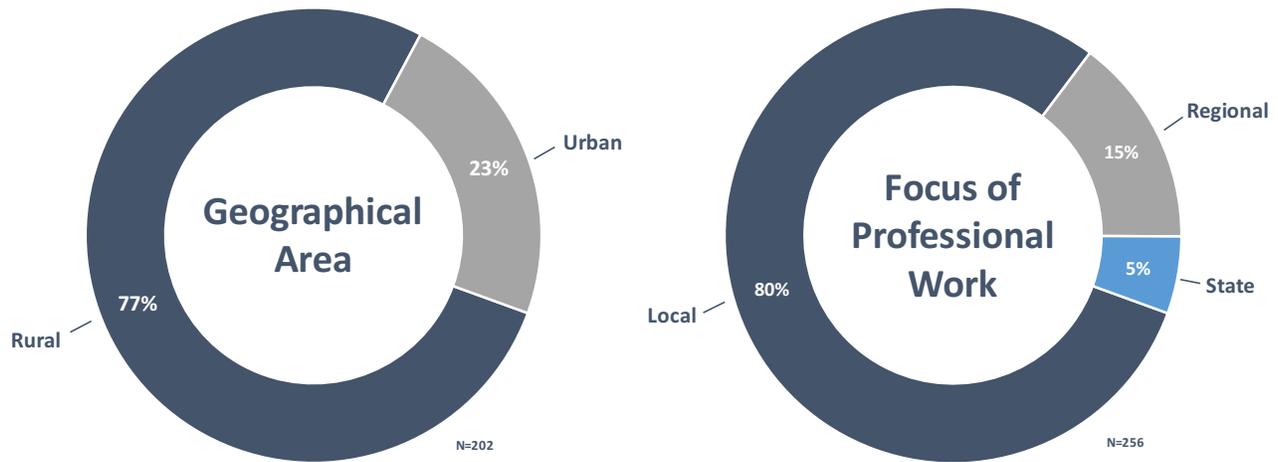
Figure 3.1: Counties of Oregon Represented in Survey.



Source: Kevin Gilbride, 2016.

Second, respondents can be described by broader descriptions of their geographical area, the, focus of their professional work, and organizations that they represent. **Figure 3.2** shows the distribution of respondents in relation to their geographical responses and the focus of their professional work. **Figure 3.3** shows the distribution of respondents in relation to organizations that they represent.

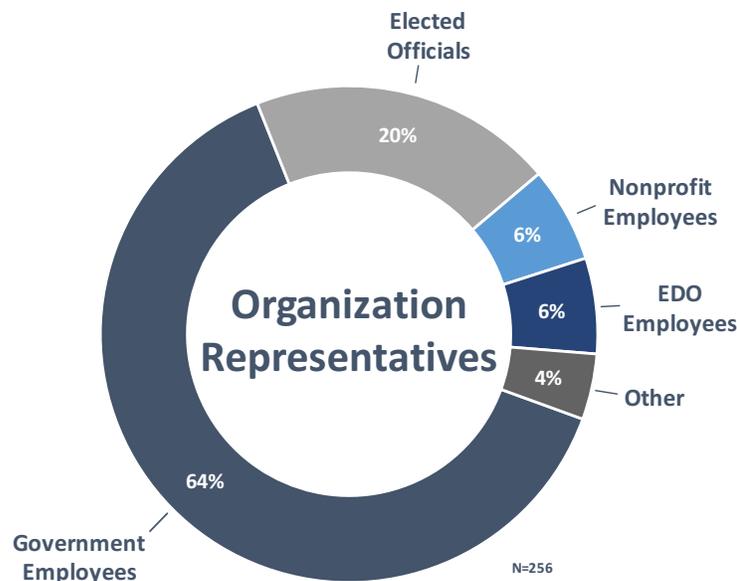
Figure 3.2: Geographical Characteristics of Respondents.



Source: Community Service Center, 2017.

The survey asked respondents to define the area that they do most their work in two ways, as geographical area (either urban or rural) and as a general focus of their work (local, regional, or state). Most respondents, 77%, indicated their geographical area as rural, and about 23% of respondents indicated their geographical area as urban. This distribution correlates with the rural nature of most of Oregon’s geography. Most respondents indicated that the focus of their professional work is on local economic development, 80%, with smaller proportions of respondents indicating a regional level of focus, 15%, and a state level of focus, 5%.

Figure 3.3: Organizations Represented by Respondents.



Source: Community Service Center, 2017.

The survey asked respondents to indicate the type of organization or agency that they represented while filling out the survey. Most respondents indicated that they represent some form of governmental organization; 64% of respondents indicated that they are government employees, and 20% of respondents indicated that they are elected officials. A small proportion of respondents indicated that they are nonprofit employees or employees of economic development organizations (EDOs), 6% respectively.

Third, respondents can be described by their duration of experience working in economic development, and by their organization’s level of activity in economic development planning. Respondents’ duration of experience in economic development ranged from less than one year to more than 50 years. The median level of experience was 10 years, with an average of 12 years’ experience. The survey asked respondents to rank their organization’s level of activity from not at all active, to very active. **Figure 3.4** shows that most respondents indicated that their organizations are either active or very active in economic development planning, with 39% of respondents indicating “very active.”

Figure 3.4: Level of Activity in Economic Development Planning.



Source: Community Service Center, 2017.

This information, in conjunction with the average duration of experience in economic development, demonstrates the relative expertise of survey respondents regarding the information relevant to this project.

PART IV – SUMMARY OF KEY SURVEY RESPONSES

This section serves as a summary of the key findings of core survey questions in relation to the information presented in this project. Of the 35 questions presented in the survey, 11 directly pertained to the implementation or evaluation of strategic economic development plans. The survey asked respondents to respond based on their perceptions of the current state of economic development. The survey presented the 11 questions in a variety of ways to attempt to determine with certainty the effectiveness of economic development. A summary of results demonstrates respondents' evaluation of the success of their strategic economic development plans, the characteristics and elements of plans, and evaluative metrics and implementation frameworks thereof.

EVALUATION OF PLAN IMPACT

To better understand the perceptions of economic development professionals towards economic development strategies in their areas, the survey included several questions pertaining to the effectiveness of strategies at achieving community economic development objectives, and the success of existing plans (if success is defined as accomplishing the goals of the economic development strategy).

In relation to perceived effectiveness of strategies at achieving community economic development objectives, **Figure 4.1** demonstrates that most professionals consider their existing plans as either as having either a neutral impact, 32%, or as effective, 45%. A smaller proportion of 22% of the overall respondent population indicated that their plans are either ineffective or very ineffective.

Figure 4.1: Perceived Effectiveness of Current Economic Development Strategies.



Source: Community Service Center, 2017.

As a comparative process to the perceived effectiveness of plans, the survey asked respondents to indicate their perceptions of the success of their current strategies. **Figure 4.2**, akin to the responses shown for perceived effectiveness, demonstrates that most professionals consider their existing plans as having either a neutral impact, 46%, or as successful, 39%. In this response, the proportion of negative responses is just 15%.

Figure 4.2: Perceived Success of Current Economic Development Strategies.



Source: Community Service Center, 2017.

SUMMARY

Responses to both questions can lead to several quick conclusions. In both effectiveness and success responses, a large proportion of respondents indicated that their plans have a neutral impact. A response like this could indicate that the existing plan has no way of determining success or effectiveness, such as a system of evaluative metrics, which is addressed further in **Characteristics and Elements of Plans**. Neutral responses could also be considered a negative response. A neutral response could also be considered a negative response; strategic economic development plans are meant to benefit their communities, so if they have a neutral impact or an indiscernible impact, then they should be considered a failure.

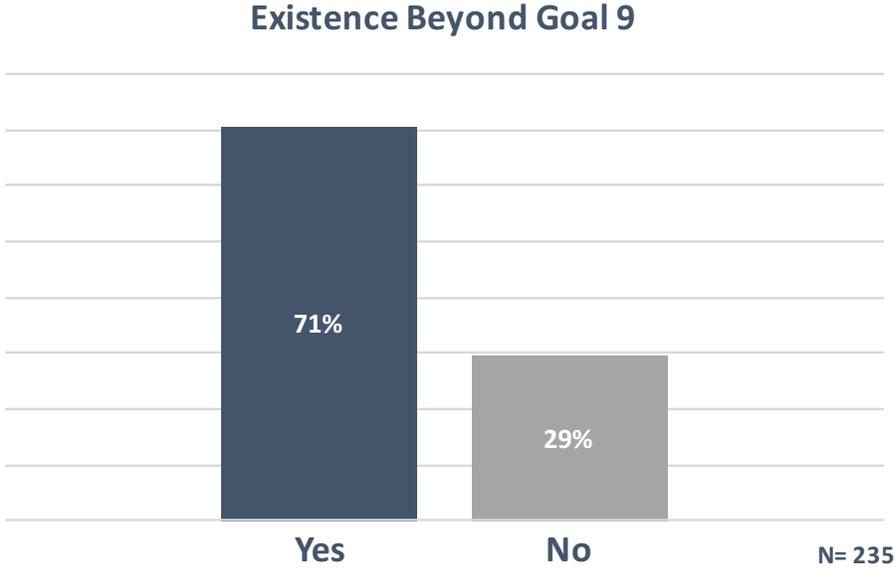
Another quick conclusion is based in the large proportion of negative or neutral responses. Over 50% of respondents indicated that their plans are ineffective or have neutral impact, and over 60% indicated that their plans are unsuccessful or have neutral impact. Plan impact is addressed further in **Findings Section III**.

CHARACTERISTICS AND ELEMENTS OF PLANS

To outline the characteristics of existing strategic economic development plans, the survey included several questions pertaining to: the scope of plans beyond the Oregon Statewide Planning Goal 9 requirements, the existence of implementation guidance or frameworks, the existence of evaluative metrics for the success of the plans, the process for revision, and the frequency of revision.

As addressed in the **Literature Review** section of this document, Oregon Statewide Planning Goal 9 requires all municipalities to include considerations for economic development within their overall comprehensive plans. To determine the scope of strategic economic development plans beyond those requirements, the survey asked respondents to indicate whether their community has an economic development strategy outside of their comprehensive plan. **Figure 4.3** demonstrates that most respondents, 71%, indicated that their community has an economic development strategy beyond the requirements of Goal 9. The smaller proportion of respondents, 29%, indicated that their plans do not extend beyond Goal 9 requirements.

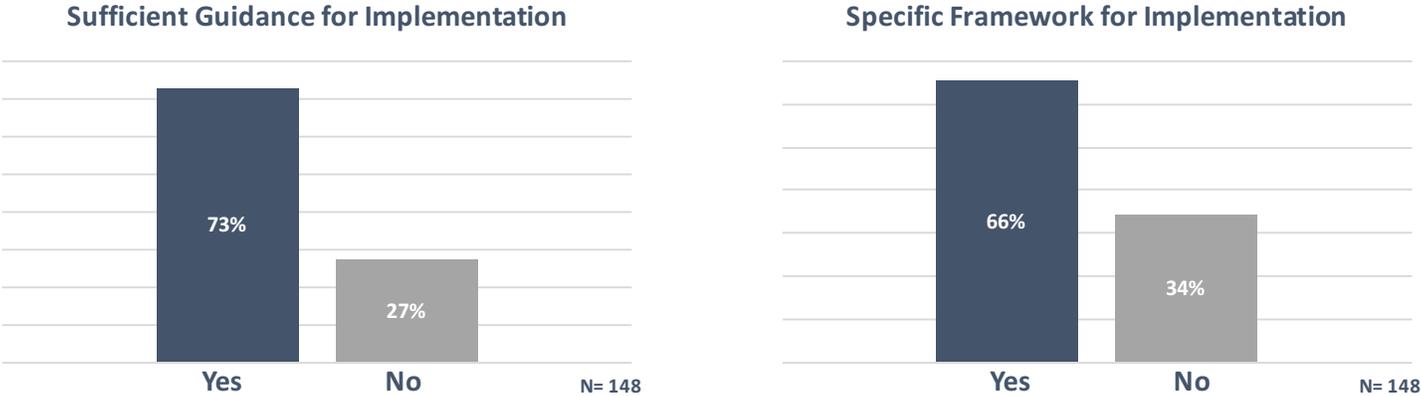
Figure 4.3: Existence of Strategic Economic Development Plans Beyond Goal 9 Requirements.



Source: Community Service Center, 2017.

To further understand the scope of communities’ strategic plans, the survey asked respondents to indicate the existence and scope of guidelines for strategy implementation. Implementation strategies allow for better understanding within communities as to how to accomplish the goals and objectives set out by economic development strategies. **Figures 4.4** demonstrates that, of the survey respondents who indicated that their strategy extends beyond the requirements of Goal 9, most include sufficient guidance for implementation, 73%, or a specific framework for implementation, 66%.

Figure 4.4: Sufficient Guidance or Specific Framework for Implementation.

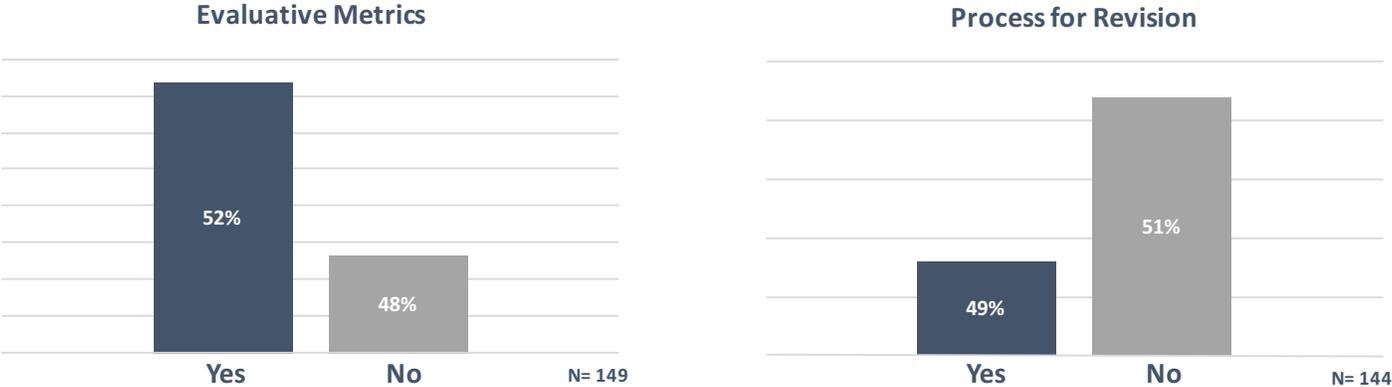


Source: Community Service Center, 2017.

Commonly, implementation strategies lead directly into some form of evaluative metrics to determine the progress of a plan, and subsequently a process for revision of plans (to realign implementation if they are not achieving goals and objectives). **Figure 4.5** demonstrates that, of the survey respondents who indicated that their strategy extends beyond the requirements of Goal 9, about half, 52%, indicated that

their plan includes evaluative metrics for determining success. Similarly, about half, 49%, of respondents indicated that their plan includes a process for revision.

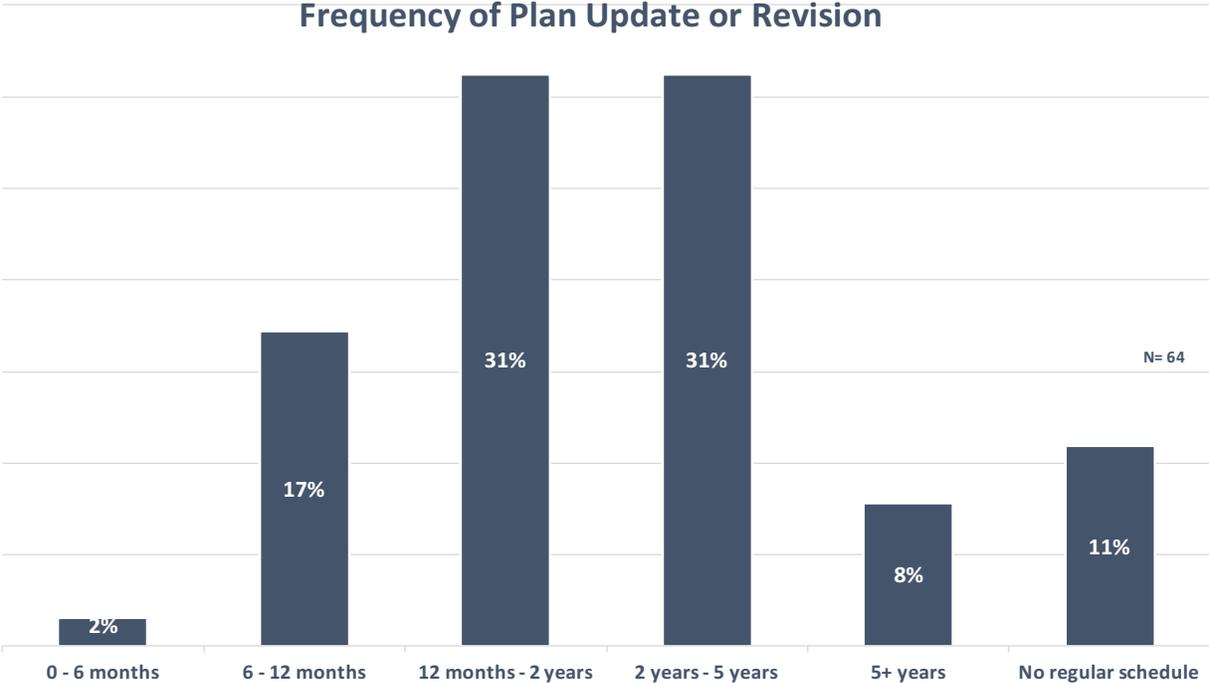
Figure 4.5: Existence of Evaluative Metrics for Success or a Process for Revision.



Source: Community Service Center, 2017.

For respondents who indicated the inclusion of a process for revision of their economic development plan, a question regarding the frequency of revision was also provided. **Figure 4.6** demonstrates that nearly a third of respondents, 31%, revise their plan every one to two years and another third of respondents, 31%, revise their plan every two to five years. Some respondents, 17%, revise their plan every six to twelve months, and some respondents, 11%, have no set schedule for revision.

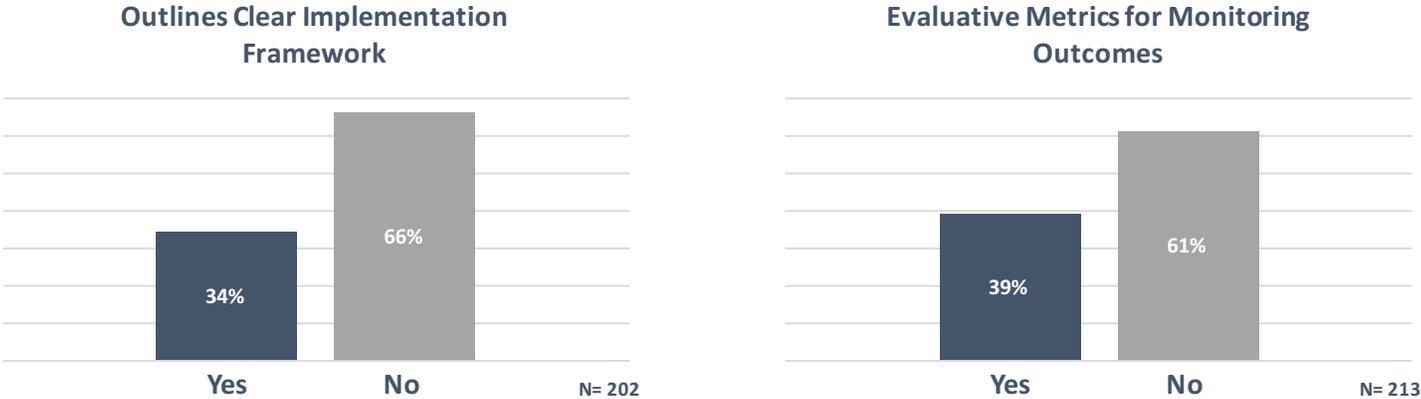
Figure 4.6: Frequency of Plan Update or Revision.



Source: Community Service Center, 2017.

To further evaluate the comprehensive nature of strategic plans, the survey once more asked all respondents to indicate the inclusion of clear implementation plans or evaluative metrics in their strategic plans (in comparison to **Figures 4.4** and **4.5**, the survey presented these two questions to all survey respondents, rather than just those who indicated that their plans extend beyond the requirement of Statewide Planning Goal 9). **Figure 4.7** demonstrates in both cases that most respondents do not consider their strategic plans to include either clear implementation frameworks, 66%, or evaluative metrics, 61%.

Figure 4.7: Existence of Clear Implementation Frameworks or Evaluative Metrics.



Source: Community Service Center, 2017.

SUMMARY

Responses on the inclusion of implementation plans, evaluative metrics, and a process for revision in strategic economic development plans can lead to several quick conclusions. First, respondents who indicated that their community has a strategic economic development plan that extends beyond the requirements of Statewide Planning Goal 9 have a higher proportion of inclusion of implementation strategies and evaluative metrics within their plans. This could indicate that the communities that have the means to expand economic development beyond minimum requirements of the state have more commitment to economic development within their communities. The disparity between responses shown, between those who replied “yes” to extension beyond Goal 9 requirements and the survey response group is also evident. However, this disparity can also be explained by the basic idea that, if a community does not have an economic development strategy (indicating “no” extension beyond Goal 9), then they would not prioritize the development of an implementation framework or evaluative metrics.

PART V – KEY FINDINGS SECTION I

The following section summarizes key findings on the perception of economic development professionals and elected officials towards the success and effectiveness of plans, and the existence of implementation frameworks or evaluative metrics for plans. The purpose of this section is to determine the level of disconnect (if any) between economic development professionals and elected officials in their perceptions and knowledge of plans. The data set presented in this section is representative of the entire survey population; all questions involved are considered **ungated**. All responses indicating “don’t know” are removed from the sample.

Section I uses cross tabulated data to establish whether correlation exists between survey responses to different questions. I establish the statistical significance of the relationship between the variables of responses through chi-square analysis, where the probability of variables being independent is held to a chosen significance level of .05 or 5%. The chi-square analysis is expressed as p-value. If the p-value is greater than the chosen significance level, anything greater than .05, then the available evidence is not considered sufficient to suggest an association between variables, and a “null hypothesis” must be declared (variables are independent). However, visual comparison of some data sets shows correlation between responses in a qualitative sense.

SUMMARY OF KEY FINDINGS:

Finding 1.1: Professionals and elected officials show no statistically significant difference in their perception of the success of economic development in the State of Oregon.

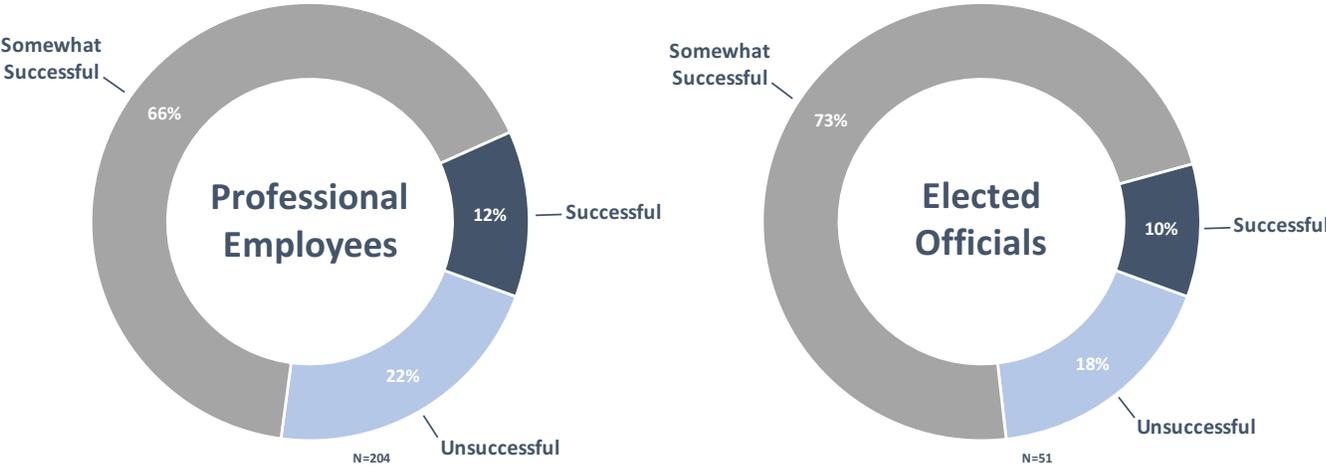
Finding 1.2: Professionals and elected officials show no perceivable difference in their perception of the effectiveness of strategic economic development plans in the State of Oregon.

Finding 1.3: Professionals and elected officials show no perceivable difference in their knowledge of the existence of implementation frameworks or evaluative metrics for plans.

FINDING 1.1: PROFESSIONALS AND ELECTED OFFICIALS SHOW NO PERCEIVABLE DIFFERENCE IN THEIR PERCEPTION OF THE SUCCESS OF ECONOMIC DEVELOPMENT IN THE STATE OF OREGON.

Finding 1.1 presents **ungated** responses from professionals and elected officials who indicated their perception of the success or lack of success of economic development in the State of Oregon. **Figure 5.1** demonstrates that most professional employees, 66%, and elected officials, 73%, consider economic development to be “somewhat successful.” Of professional employees, 22% consider economic development as “unsuccessful,” and 12% consider it “successful.” Of elected officials, 18% consider economic development “unsuccessful,” and 10% consider it “successful.”

Figure 5.1: Perception of Professionals and Elected Officials on the Success of Economic Development in the State of Oregon (Ungated)



Source: Community Service Center, 2017.

SUMMARY

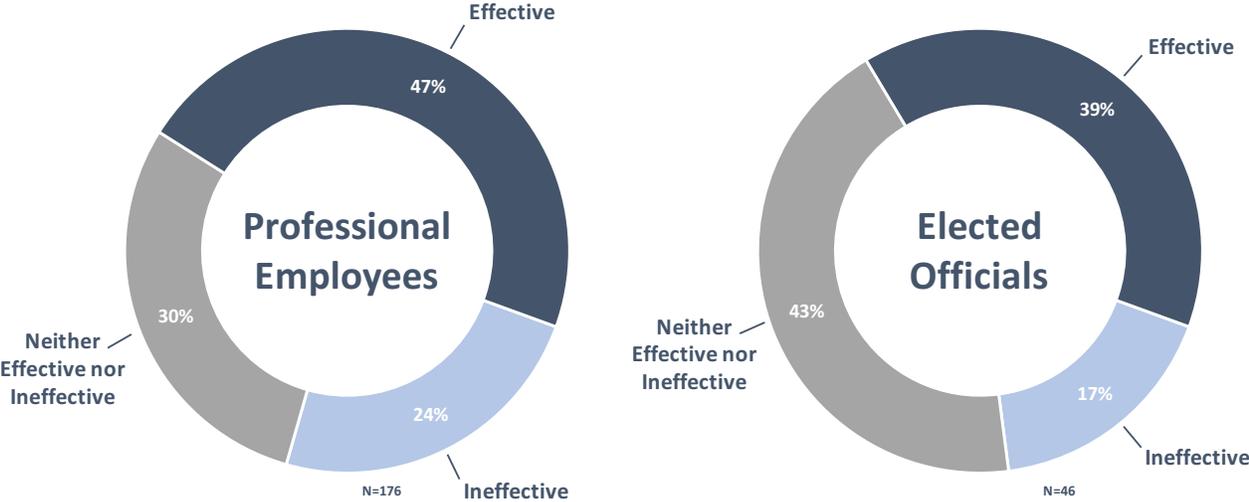
Although this section presents the perceptions of professional employees and elected officials on the success of economic development as comparable, with most respondents considering it as “somewhat successful.” The visual correlation does not necessarily demonstrate a true correlation through dependent variables. The chi-square p-value of this cross tabulation is .684, demonstrating a 68% chance that the variables in this computation are independent of one another.

The survey responses in **Finding 1.1** show that professionals and elected officials generally have the same perceptions on the success of economic development, demonstrating little disconnect between the two groups.

FINDING 1.2: PROFESSIONALS AND ELECTED OFFICIALS SHOW NO PERCEIVABLE DIFFERENCE IN THEIR PERCEPTION OF THE EFFECTIVENESS OF STRATEGIC ECONOMIC DEVELOPMENT PLANS IN THE STATE OF OREGON.

Finding 1.2 presents **ungated** responses from professionals and elected officials who indicated their perception of the effectiveness or lack of effectiveness of economic development plans in the State of Oregon. **Figure 5.2** demonstrates that there is no consensus on the effectiveness of strategic plans among respondents. Of professional employees, 47% consider their community’s plan as “effective,” 30% consider their plan as having a neutral impact, and 24% consider their plan as “ineffective.” Of elected officials, 43% consider their community’s plan as having a neutral impact, 39% consider their plan to be “effective,” and 10% consider their plan to be “successful.”

Figure 5.2: Perception of Professionals and Elected Officials on the Effectiveness of Economic Development Plans (Ungated)



Source: Community Service Center, 2017.

SUMMARY

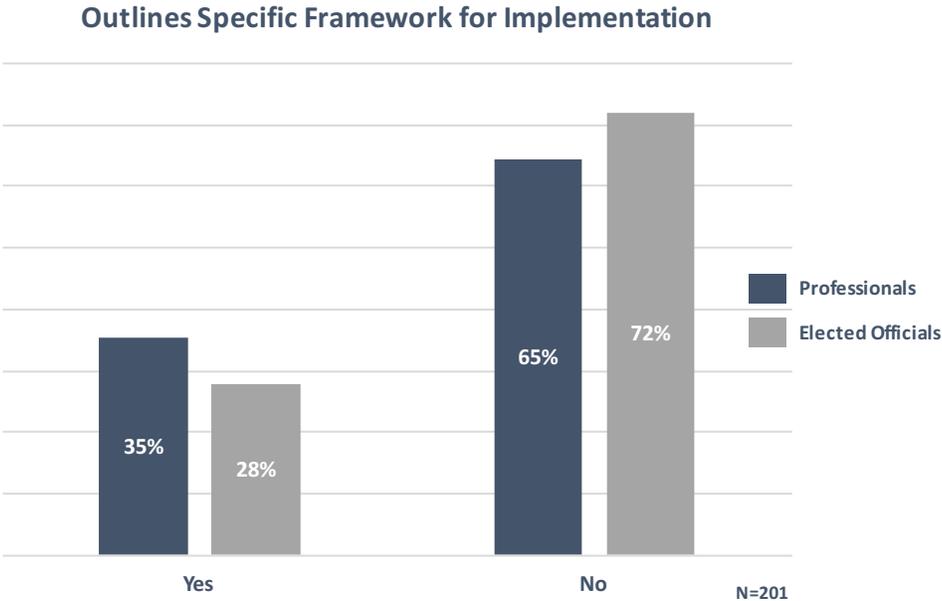
The spread of responses by professionals and elected officials on the effectiveness of economic development plans demonstrates a visual correlation of non-consensus. The visual correlation does not necessarily demonstrate a true correlation through dependent variables. The chi-square p-value of the cross-tabulation is .265, a near 27% chance that the variables are independent of one another.

The visual correlation of non-consensus does, however, demonstrate that professionals and elected officials generally have the same perceptions of plan effectiveness, showing little disconnect between the groups.

FINDING 1.3: PROFESSIONALS AND ELECTED OFFICIALS SHOW NO PERCEIVABLE DIFFERENCE IN THEIR KNOWLEDGE OF THE EXISTENCE OF IMPLEMENTATION FRAMEWORKS OR EVALUATIVE METRICS FOR PLANS.

Finding 1.3 presents **ungated** responses from professionals and elected officials who indicated that their community’s plans include specific implementation frameworks, or evaluative metrics for success. **Figure 5.3** demonstrates that, of professional employees, 35% indicated that their community’s plan includes a specific framework for implementation, and 65% indicated that it does not. Of elected officials, 28% indicated inclusion of implementations frameworks, and 72% no inclusion.

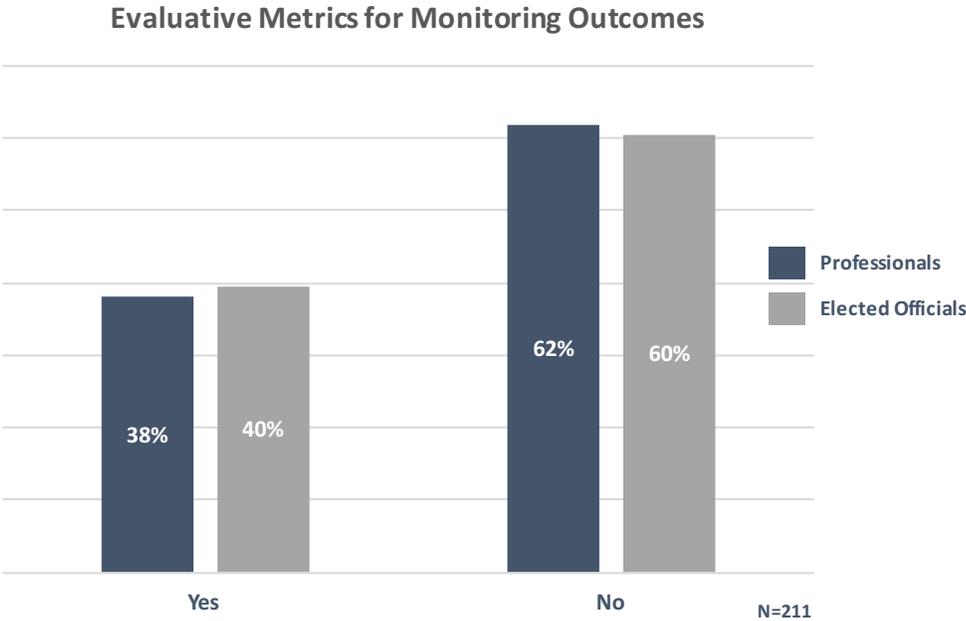
Figure 5.3: Comparison of Professional Employee and Elected Official Knowledge of Plan’s Inclusion of a Specific Framework for Implementation (Ungated)



Source: Community Service Center, 2017.

Figure 5.4 demonstrates that, of professional employees, 38% indicated that their community’s plan includes evaluate metrics for monitoring outcomes, and 62% indicated that it does not. Of elected officials, 40% indicated inclusion of evaluate metrics, and 60% no inclusion.

Figure 5.4: Comparison of Professional Employee and Elected Official Knowledge of Plan’s Inclusion of Evaluative Metrics (Ungated)



Source: Community Service Center, 2017.

SUMMARY

Finding 1.3 presents the knowledge of professional employees and elected officials on the inclusion of specific frameworks for implementation and evaluative metrics as comparable. The visual correlation does not necessarily demonstrate a true correlation through dependent variables. The chi-square p-value of the cross-tabulation of implementation frameworks is .087, demonstrating a near 9% chance that the variables in this computation are independent of one another. The chi-square p-value of the cross-tabulation of evaluative metrics is .834, demonstrating an 83% chance that the variables in this computation are independent of one another.

However, the visual correlation in **Finding 1.3** demonstrates that professionals and elected officials generally have the same knowledge of the existence and inclusion of specific implementation plans and evaluative metrics in their community's plans, showing little disconnect between the groups.

PART VI – KEY FINDINGS SECTION II

The following section presents key findings on the comparison of survey responses towards the inclusion of implementation frameworks and evaluative metrics in economic development plans. The purpose of this section is to determine the robustness of existing plans and whether communities who have one aspect of plan robustness, such as implementation frameworks, are more likely to also include others. The data set presented in this section includes responses from both **gated** and **ungated** survey questions. **Gated** question response populations are smaller than the entire survey population. In **gated** sections, only respondents who indicated their plans extend beyond Goal 9 requirements were included. The data set presented in this section is a comparison of responses to four questions regarding the inclusion of implementation plans or evaluative metrics. The sample presented here is representative of the entire survey population, all responses indicating “don’t know” are removed from the sample.

Section II uses cross tabulated data to establish whether correlation exists between survey responses to different questions. I establish the statistical significance of the relationship between the variables of responses through chi-square analysis, where the probability of variables being independent is held to a chosen significance level of .05 or 5%. The chi-square analysis is expressed as p-value. If the p-value is greater than the chosen significance level, anything greater than .05, then the available evidence is not considered sufficient to suggest an association between variables, and a “null hypothesis” must be declared (variables are independent). However, visual comparison of some data sets shows correlation between responses in a qualitative sense. In contrast to **Section I**, data in this section is presented with perceptions of economic development professionals and elected officials combined.

SUMMARY OF KEY FINDINGS:

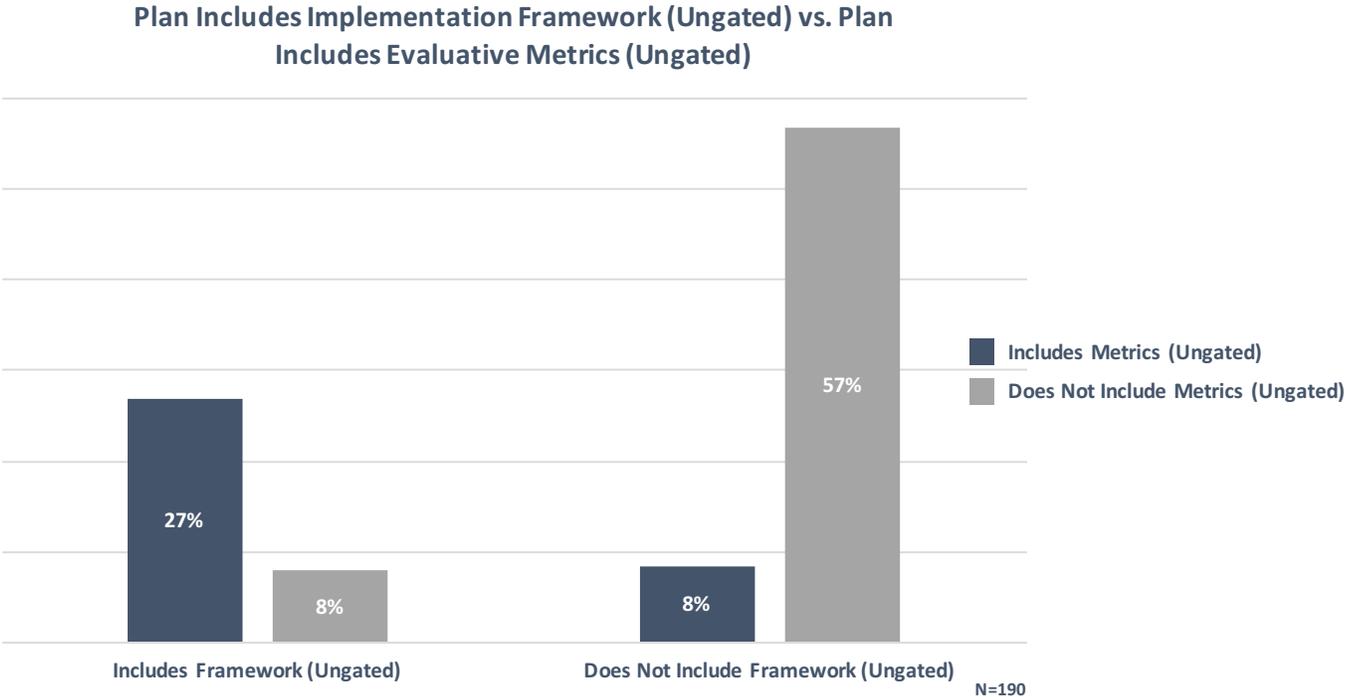
Finding 2.1: Of **ungated** responses, most indicated that their community’s plan includes neither implementation frameworks nor evaluative metrics.

Finding 2.2: Of **gated** responses, most indicated that their community’s plan includes some form of implementation framework, evaluative metrics, or both.

FINDING 2.1: OF UNGATED RESPONSES, MOST INDICATED THAT THEIR COMMUNITY’S PLAN INCLUDES NEITHER IMPLEMENTATION FRAMEWORKS NOR EVALUATIVE METRICS.

Finding 2.1 presents **ungated** responses from professionals on whether their community’s plan includes a specific implementation framework, evaluative metrics for positive impact, or both. **Figure 6.1** demonstrates that, most, 57% consider their community’s plan to include neither implementation frameworks nor evaluative metrics, and 27% say their community’s plan has both. Of the remaining respondents, 8% indicated that their plan contains implementation frameworks, but no evaluative metrics and 8% indicated that their plan contains evaluative metrics, but no implementation framework.

Figure 6.1: Strategic Economic Development Plan Robustness, Inclusion of Implementation Framework, Evaluative Metrics, or Both (Ungated)



Source: Community Service Center, 2017.

SUMMARY

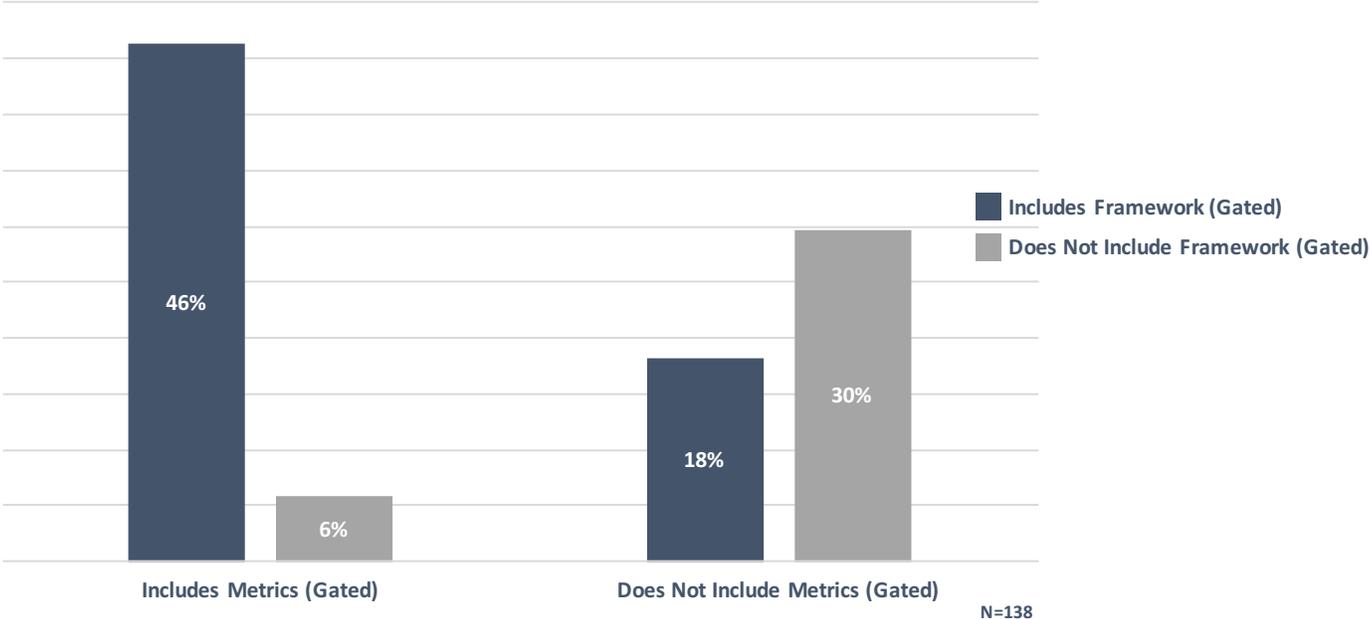
Finding 2.1 shows that most economic development plans in the State of Oregon include no elements beyond goals and objectives. Though 71% of survey respondents indicate that their community’s plan extends beyond Goal 9 requirements, **Finding 2.1’s** results show that the extension may be very limited. The chi-square p-value of the cross tabulation of these two responses is < 0.001, representing a p-value well below the minimum standard of 0.05, demonstrating a relationship between the variables.

FINDING 2.2: OF GATED RESPONSES, MOST INDICATED THAT THEIR COMMUNITY’S PLAN INCLUDES SOME FORM OF IMPLEMENTATION FRAMEWORK, EVALUATIVE METRICS, OR BOTH.

Finding 2.1 presents **gated** responses from professionals on whether their community’s plan includes a specific implementation framework, evaluative metrics for positive impact, or both. **Figure 6.2** demonstrates that, most respondents consider their community’s plan to include implementation frameworks, evaluative metrics, or both. Forty-six percent indicate their community’s plan has both, 18% indicate that they have an implementation framework but not evaluative metrics, and 6% say they have evaluative metrics, but no implementation framework. Of the remaining respondents, 30% indicated that their plan contains neither implementation frameworks nor evaluative metrics.

Figure 6.2: Strategic Economic Development Plan Robustness, Inclusion of Implementation Framework, Evaluative Metrics, or Both (Gated)

Plan Includes Evaluative Metrics (Gated) vs. Includes Implementation Framework (Gated)



Source: Community Service Center, 2017.

SUMMARY

Finding 2.2 shows that, of those respondents who indicated their community’s plan extends beyond Goal 9 requirements, most indicated that their plan also includes some form of further robustness. As considered in **Finding 2.1**, 71% of survey respondents indicate that their community’s plan extends beyond Goal 9 requirements, **Finding 2.2’s** results show that most 30% of those plans are very limited. The chi-square p-value of the cross tabulation of these two responses is < 0.001, representing a p-value well below the minimum standard of 0.05, demonstrating a relationship between the variables.

PART VII – KEY FINDINGS SECTION III

The following section summarizes key findings on the perception of economic development professionals and elected officials who indicated that their community’s strategic economic development plans extend beyond Statewide Planning Goal 9 regulations. This section addresses whether there is correlation between the existence of implementation guidance, evaluative metrics and revision processes, and the success or effectiveness of plans. Much like **Key Findings Sections I and II**, this section uses cross tabulated data to establish relationships between survey responses to different questions. I establish the statistical significance of the relationship between the variables of responses through chi-square analysis, where the probability of variables being independent is held to a chosen significance level of .05 or 5%. The chi-square analysis is expressed a p-value. If the p-value is greater than the chosen significance level, anything greater than .05, then there is not enough evidence to suggest an association between variables and a “null hypothesis” must be declared (variables are unrelated).

The data set presented in this section includes responses from both **gated** and **ungated** survey questions. **Gated** question response populations are smaller than the entire survey population. In **gated** sections, only respondents who indicated their plans extend beyond Goal 9 requirements were included. **Gating** is used to determine the success and effectiveness of strategic economic development in communities where respondents indicated their efforts extend beyond Goal 9. **Findings 2 through 5** all present data based on gated responses. Where necessary, **gated** and **ungated** questions are expressly labeled. As with the findings of **Section II**, data in this section is presented with perceptions of economic development professionals and elected officials combined.

SUMMARY OF KEY FINDINGS:

Finding 3.1: Of **ungated** respondents, those who indicated that their community’s plan for economic development extends beyond the requirements of Goal 9 perceive a higher level of effectiveness and success than those whose plan does not.

Finding 3.2: Of **ungated** and **gated** respondents, those who indicated that their community’s strategic economic development plan includes a specific framework for implementation, also indicated a higher perception of effectiveness and success than those whose plan does not.

Finding 3.3: Of **ungated** and **gated** respondents, those who indicated that their community’s strategic economic development plan includes specific metrics, indicators, or benchmarks for success also indicated a higher perception of effectiveness and success than those whose plan does not.

Finding 3.4: Of **gated** respondents, those who indicated that their strategic economic development plan includes sufficient guidance for implementation also indicated a higher perception of plan effectiveness and success than those whose plan does not.

Finding 3.5: Of **gated** respondents, those who indicated that their strategic economic development plan includes a process for revision also indicated a higher perception of plan effectiveness and success than those whose plan does not.

FINDING 3.1: RESPONDENTS WHO INDICATED THAT THEIR COMMUNITY’S PLAN FOR ECONOMIC DEVELOPMENT EXTENDS BEYOND THE REQUIREMENTS OF GOAL 9 PERCEIVE A HIGHER LEVEL OF EFFECTIVENESS AND SUCCESS THAN THOSE WHOSE PLAN DOES NOT.

Most survey respondents, 71%, indicated that their community’s economic development plan extends beyond the requirements of Oregon Statewide Planning Goal 9, whereas 29% indicated that their community’s plan did not (demonstrated in **Figure 4.3** included in **Characteristics and Elements of Plans**). The survey question about plan extension beyond Goal 9 requirements placed no qualifiers as to the extent or comprehensive nature of economic development planning that communities engage in. The purpose of the question was to determine whether communities place **any** kind of emphasis on economic development. **Finding 3.1** presents responses from ungated professionals.

CONSIDERATION OF PLAN’S EFFECTIVENESS

In consideration of the relationship between the two variables of plan effectiveness and plan extension beyond Goal 9 requirements, the chi-square analysis shows a p-value of 0.000. Such a low p-value demonstrates a clear dependency between variables.

Figure 7.1 demonstrates that, of the respondents who indicated that their plan extends beyond the requirements of Goal 9, most, 63%, consider their community’s economic development plan as either “effective” or “very effective.” Fourteen percent of respondents indicated that their plan is either “ineffective” or “very ineffective,” and 23% of respondents considered their plan to have a neutral impact.

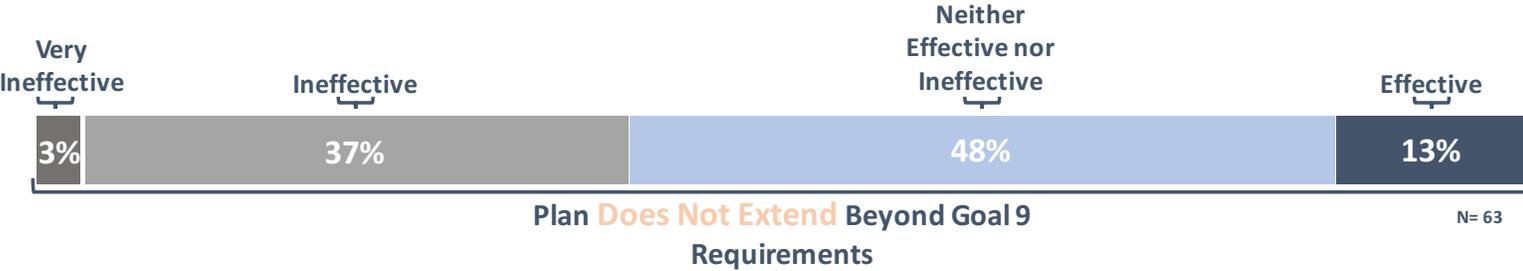
Figure 7.1: Strategic Economic Development Plan Extends Beyond Goal 9 Requirements, Consideration of Plan’s Effectiveness (Ungated)



Source: Community Service Center, 2017.

In comparison to **Figure 7.1**, **Figure 7.2** demonstrates that, of respondents who indicated that their plan does not extend beyond the requirements of Goal 9, only 13% consider their community’s economic development plan as “effective;” 0% of respondents indicated their plans to be “very effective.” Most respondents, 48%, considered their plan to have a neutral impact, whereas 40% of respondents considered their plan to be either “ineffective” or “very ineffective.”

Figure 7.2: Strategic Economic Development Plan Does Not Extend Beyond Goal 9 Requirements, Consideration of Plan’s Effectiveness (Ungated)



Source: Community Service Center, 2017.

CONSIDERATION OF PLAN’S SUCCESS

In consideration of the relationship between the two variables, plan success and plan extension beyond Goal 9 requirements, the chi-square analysis shows a p-value of 0.000. Such a low p-value demonstrates a clear dependency between variables.

Figure 7.3 demonstrates that, of the respondents who indicated that their plan extends beyond the requirements of Goal 9, most, 55%, consider their community’s economic development plan is either “successful” or “very successful,” whereas 9% considered their plan either “ineffective” or “very ineffective,” and 35% considered their plan to have a neutral impact.

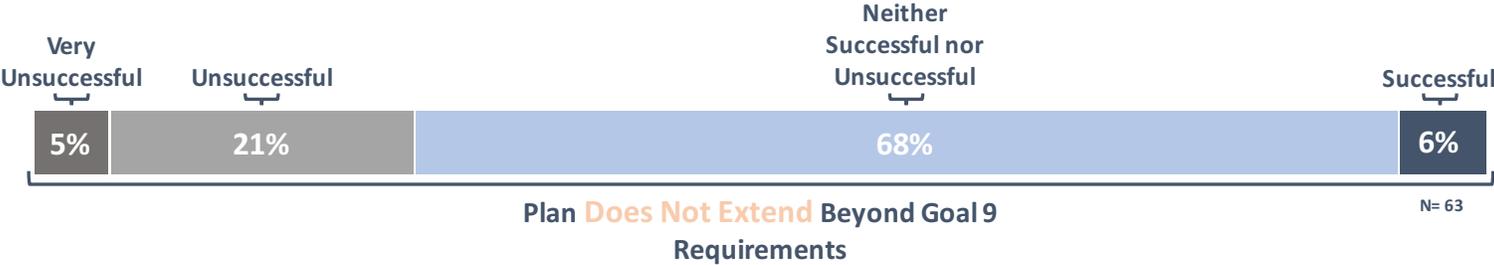
Figure 7.3: Strategic Economic Development Plan Extends Beyond Goal 9 Requirements, Consideration of Plan’s Success (Ungated)



Source: Community Service Center, 2017.

Figure 7.4 demonstrates that, of the respondents who indicated that their plan does not extend beyond Goal 9 requirements, most respondents, 68%, considered their plan to have a neutral impact, only 6% considered their plan “successful;” 0% of responses indicated their plan as “very successful,” and 26% of respondents considered their plan either “unsuccessful” or “very unsuccessful.”

Figure 7.4: Strategic Economic Development Plan Does Not Extend Beyond Goal 9 Requirements, Consideration of Plan’s Success (Ungated)



Source: Community Service Center, 2017.

SUMMARY

Finding 3.1 demonstrates clearly the relationship between the two variables of plan extension beyond Goal 9 requirements and perceptions of the positive impact of plans. In both cases, measures of effectiveness and success in relation to extension of plans show p-values well below the minimum standard of 0.05.

Based on the smaller proportion of “successful” and “effective,” and the absence of “very” positive responses in both cases, it is evident that **any** kind, type, or focus of strategic planning beyond Goal 9 requirements is beneficial to economic development. Communities that place no emphasis beyond Goal 9 requirements also show a much higher perception of neutral changes in economic development. This could indicate a higher level of difficulty in understanding success or effectiveness without a plan to base it on.

FINDING 3.2: OF UNGATED AND GATED RESPONDENTS, THOSE WHO INDICATED THAT THEIR COMMUNITY’S STRATEGIC ECONOMIC DEVELOPMENT PLAN INCLUDES A SPECIFIC FRAMEWORK FOR IMPLEMENTATION, ALSO INDICATED A HIGHER PERCEPTION OF EFFECTIVENESS AND SUCCESS THAN THOSE WHOSE PLAN DOES NOT.

Finding 3.2 presents responses from ungated and gated professionals who indicated that their community’s economic development plans either include or do not include a specific framework for implementation. This question did not define “specific framework” for implementation, allowing respondents to establish their own definition in the context of their communities.

CONSIDERATION OF PLAN’S EFFECTIVENESS

In consideration of the relationship between the two variables of plan effectiveness and plan inclusion or lack of inclusion of a specific framework for implementation, the chi-square analysis of both **ungated** and **gated** responses shows a p-value of 0.000. Such a low p-value demonstrates a clear dependency between variables.

Figure 7.5 demonstrates that, of **ungated** respondents who indicated that their community’s plan includes a specific framework for implementation, most, 82%, consider their plan as either “effective” or “very effective.” A small percentage of respondents, 7%, indicated that their community’s plan is either “ineffective” or “very ineffective,” and 12% consider their plan to have a neutral impact.

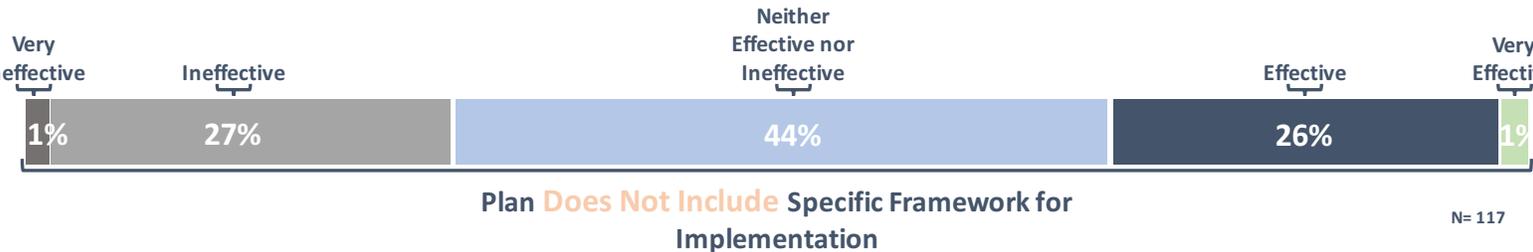
Figure 7.5: Strategic Economic Development Plan Includes Specific Framework for Implementation, Consideration of Plan’s Effectiveness (Ungated)



Source: Community Service Center, 2017.

In comparison to **Figure 7.5**, **Figure 7.6** demonstrates that, of **ungated** respondents who indicated that their community’s plan does not include a specific framework for implementation, 27% of respondents consider their plan as either “effective” or “very effective.” Twenty-eight percent of respondents indicated that their plan is either “ineffective or “very ineffective,” and 44% consider their plan to have a neutral impact.

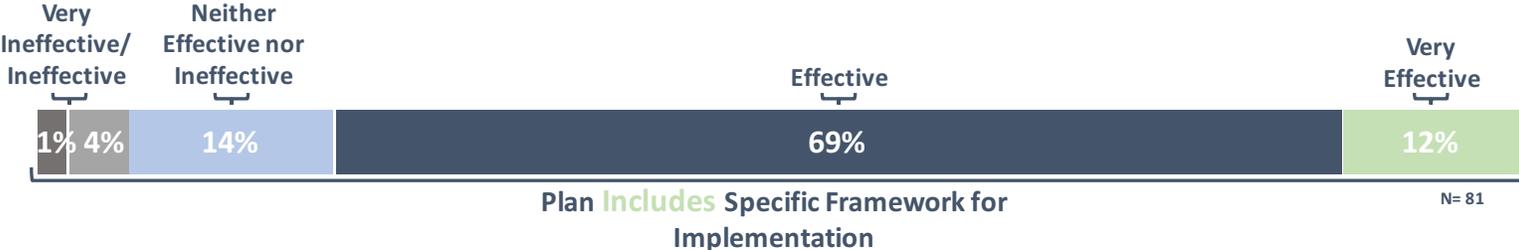
Figure 7.6: Strategic Economic Development Plan Does Not Include Specific Framework for Implementation, Consideration of Plan’s Effectiveness (Ungated)



Source: Community Service Center, 2017.

Figure 7.7 demonstrates that, of **gated** the respondents who indicated that their plan includes a specific framework for implementation, most, 81%, consider their economic development efforts as either “effective” or “very effective.” The minority of respondents, 5%, consider their plan as either “ineffective” or “very ineffective,” and only 14% consider their efforts to have a neutral impact.

Figure 7.7: Strategic Economic Development Plan Includes Specific Framework for Implementation, Consideration of Plan’s Effectiveness (Gated)



Source: Community Service Center, 2017.

Figure 7.8 demonstrates that, of **gated** respondents who indicated that their plan does not include a specific framework for implementation, only 30% consider their plan as either “effective” or “very effective.” Most respondents consider their plan as either “ineffective,” 30%, or as having a neutral impact, 40%.

Figure 7.8: Strategic Economic Development Plan Does Not Include Specific Framework for Implementation, Consideration of Plan’s Effectiveness (Gated)



Source: Community Service Center, 2017.

CONSIDERATION OF PLAN’S SUCCESS

In consideration of the relationship between the two variables of plan success and plan inclusion or lack of inclusion of a specific framework for implementation, the chi-square analysis of **ungated** responses shows a p-value of 0.000, and **gated** responses shows a p-value of 0.002. Such a low p-value in both cases demonstrates a clear dependency between variables.

Figure 7.9 demonstrates that, of **ungated** respondents who indicated that their community’s plan includes a specific framework for implementation, most, 78% consider their plan as either “successful” or “very successful.” A small percentage of respondents, 4%, consider their plan as either “unsuccessful” or “very unsuccessful,” and 21% consider their plan to have a neutral impact.

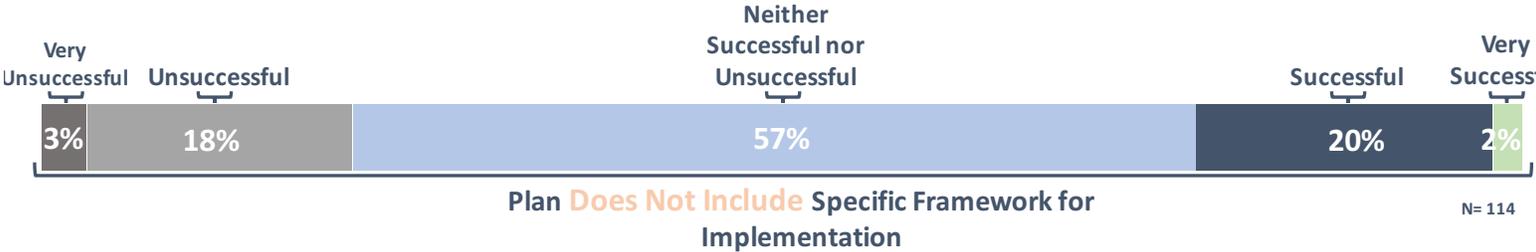
Figure 7.9: Strategic Economic Development Plan Includes Specific Framework for Implementation, Consideration of Plan’s Success (Ungated)



Source: Community Service Center, 2017.

In comparison to **Figure 7.9**, **Figure 7.10** demonstrates that, of **ungated** respondents who indicated that their community’s plan does not include a specific framework for implementation, most, 57%, consider their plan to have a neutral impact, 22% consider their plan to be either “successful” or “very successful,” and 21% consider their plan to be either “unsuccessful” or “very unsuccessful.”

Figure 7.10: Strategic Economic Development Plan Does Not Include Specific Framework for Implementation, Consideration of Plan’s Success (Ungated)



Source: Community Service Center, 2017.

Figure 7.11 demonstrates that, of **gated** respondents who indicated that their plan includes a specific framework for implementation, most, 70%, consider their plan as either “successful” or “very successful.” The minority of respondents consider their efforts as either “unsuccessful” or “very unsuccessful,” 7%, or as having a neutral impact, 24%.

Figure 7.11: Strategic Economic Development Plan Includes Specific Framework for Implementation, Consideration of Plan’s Success (Gated)



Source: Community Service Center, 2017.

Figure 7.12 demonstrates that, of **gated** respondents who indicated that their plan does not include a specific framework for implementation, only 30% consider their plan to be “successful,” and 0% consider their plan as “very successful.” Some respondents consider their plan as either “unsuccessful” or “very unsuccessful,” 17%, whereas, most respondents consider their plan to have a neutral impact, 53%.

Figure 7.12: Strategic Economic Development Plan Does Not Include Specific Framework for Implementation, Consideration of Plan’s Success (Gated)



Source: Community Service Center, 2017.

SUMMARY

Finding 3.2 demonstrates clearly the relationship between the two variables of a specific framework for implementation and perceptions of the positive impact of plans. In both cases, measures of effectiveness and success in relation to extension of plans show p-values well below the minimum standard of 0.05.

A specific framework for implementation has a positive effect on both the perception of a community’s strategic economic development plan’s effectiveness and success. In both measurement of effectiveness and success, professionals who indicated that their community’s plan includes a specific framework, the proportion of positive perception is more than double the positive perception of communities who do not have a specific framework.

FINDING 3.3: OF GATED RESPONDENTS, THOSE WHO INDICATED THAT THEIR STRATEGIC ECONOMIC DEVELOPMENT PLAN INCLUDES EVALUATIVE METRICS, INDICATORS, OR BENCHMARKS ALSO INDICATED A HIGHER PERCEPTION OF PLAN EFFECTIVENESS AND SUCCESS.

Finding 3.3 presents **ungated** and **gated** responses from professionals who indicated that their community’s economic development plans either include or do not include evaluative metrics to determine success or effectiveness. The definition of “evaluative metrics” was left up to the professional’s own opinion, but open ended responses describing evaluative metrics included: counts of total business licenses granted by the community over time, increase in median wages, increase in number of total jobs in the community, and total increase in funding to public infrastructure projects.

CONSIDERATION OF PLAN’S EFFECTIVENESS

In consideration of the relationship between the two variables of plan effectiveness and plan inclusion or lack of inclusion of evaluative metrics, indicators, or benchmarks, the chi-square analysis of **ungated**

responses shows a p-value of 0.000, and **gated** responses shows a p-value of 0.000. Such a low p-value in both cases demonstrates a clear dependency between variables.

Figure 7.13 demonstrates that, of **ungated** respondents who indicated that their community’s plan includes evaluative metrics, most, 82%, consider their plan as either “effective” or “very effective.” A small percentage of respondents, 4%, consider their plan either “ineffective” or “very ineffective,” and 11% consider their plan to have a neutral impact.

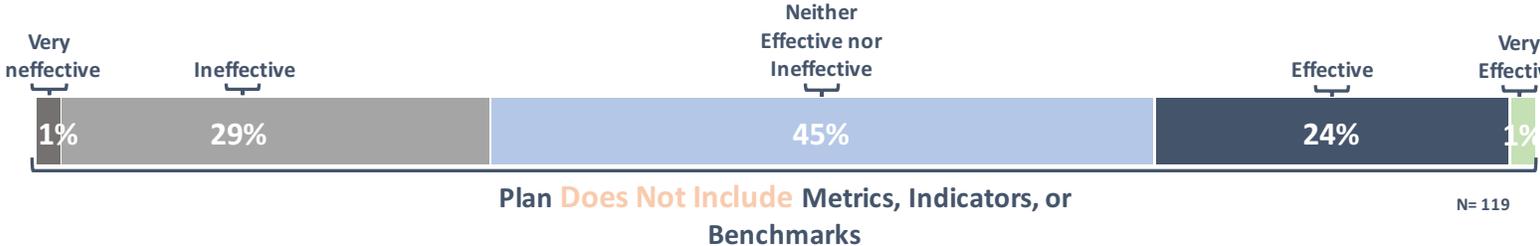
Figure 7.13: Strategic Economic Development Plan Includes Evaluative Metrics, Consideration of Plan’s Effectiveness (Ungated)



Source: Community Service Center, 2017.

In comparison to **Figure 7.13**, **Figure 7.14** demonstrates that, of **ungated** respondents who indicated that their community’s plan does not include evaluative metrics, 45% consider their plan to have a neutral impact, 30% consider their plan to be either “ineffective” or “very ineffective,” and 25% consider their plan to be either “effective” or “very effective.”

Figure 7.14: Strategic Economic Development Plan Does Not Include Evaluative Metrics, Consideration of Plan’s Effectiveness (Ungated)



Source: Community Service Center, 2017.

Figure 7.15 demonstrates that, of **gated** respondents who indicated that their community’s plan includes evaluative metrics, most, 86%, consider their plan either “effective” or “very effective.” Of those with evaluative metrics, only 2% consider their plan either ineffective” or “very ineffective,” and 12% consider their plan to have a neutral impact.

Figure 7.15: Strategic Economic Development Plan Includes Evaluative Metrics, Consideration of Plan’s Effectiveness (Gated)



Source: Community Service Center, 2017.

Figure 7.16 demonstrates that, of **gated** respondents who indicated that their community’s plan does not include evaluative metrics, 40% consider their plan either “effective” or “very effective,” whereas, 25% consider their plan “ineffective” and 0% consider their plan “very ineffective.” Thirty five percent of respondents consider their community’s plan to have a neutral impact.

Figure 7.16: Strategic Economic Development Plan Does Not Include Evaluative Metrics, Consideration of Plan’s Effectiveness (Gated)



Source: Community Service Center, 2017.

CONSIDERATION OF PLAN’S SUCCESS

In consideration of the relationship between the two variables of plan success and plan inclusion or lack of inclusion of evaluative metrics, indicators, or benchmarks, the chi-square analysis of **ungated** responses shows a p-value of 0.000, and **gated** responses shows a p-value of 0.000. Such a low p-value in both cases demonstrates a clear dependency between variables, negating the conclusion of a null-hypothesis.

Figure 7.17 demonstrates that, of **ungated** respondents who indicated that their community’s plan includes evaluative metrics, most, 75%, consider their plan either “successful” or “very successful.” Of those with evaluative metrics, only 6% consider their plan to be either “unsuccessful” or “very unsuccessful,” and 20% consider their plan to have a neutral impact.

Figure 7.17: Strategic Economic Development Plan includes Evaluative Metrics, Consideration of Plan’s Success (Ungated)



Source: Community Service Center, 2017.

In comparison to **Figure 7.17**, **Figure 7.18** demonstrates that, of **ungated** respondents who indicated that their community’s plan does not include evaluative metrics, most, 60% consider their plan to neutral impact, 20% consider their plan as “successful,” and 20% consider their plan to be either “unsuccessful” or “very unsuccessful” (0% of respondents indicated their plan as “very successful”)

Figure 7.18: Strategic Economic Development Plan Does Not Include Evaluative Metrics, Consideration of Plan’s Success (Ungated)



Source: Community Service Center, 2017.

Figure 7.19 demonstrates that, of **gated** respondents who indicated that their community’s plan includes evaluative metrics, 74% consider their plan either “successful” or “very successful.” Of those with evaluative metrics, only 5% of respondents consider their plan “unsuccessful” or “very unsuccessful,” and 21% consider their plan to have a neutral impact.

Figure 7.19: Strategic Economic Development Plan Includes Evaluative Metrics, Consideration of Plan’s Success (Gated)



Source: Community Service Center, 2017.

Figure 7.20 demonstrates that, of **gated** respondents who indicated that their community’s plan does not include evaluative metrics, 39% consider their plan either “successful” or “very successful.” Of those

without evaluative metrics, 16% consider their community’s plan either “unsuccessful” or “very unsuccessful,” and 46% consider their plan to have a neutral impact.

Figure 7.20: Strategic Economic Development Plan Does Not Include Evaluative Metrics, Consideration of Plan’s Success (Gated)



Source: Community Service Center, 2017.

SUMMARY

Finding 3.3 demonstrates clearly the relationship between the two variables of evaluative metrics and perceptions of the positive impact of plans. In both cases, measures of effectiveness and success in relation to evaluative metrics show p-values well below the minimum standard of 0.05.

FINDING 3.4: OF GATED RESPONDENTS, THOSE WHO INDICATED THAT THEIR STRATEGIC ECONOMIC DEVELOPMENT PLAN INCLUDES SUFFICIENT GUIDANCE FOR IMPLEMENTATION ALSO INDICATED A HIGHER PERCEPTION OF PLAN EFFECTIVENESS AND SUCCESS.

Finding 3.4 presents **gated** responses from professionals who indicated that their community’s economic development plans either include or do not include sufficient guidance for implementation. This question did not define “sufficient guidance for implementation,” allowing respondents to establish their own definition in the context of their communities. In comparison to **Finding 3.2**, this question placed more emphasis on a professional’s own definition of “sufficient guidance for implementation,” and less emphasis on the existence of a set plan for implementation.

CONSIDERATION OF PLAN’S EFFECTIVENESS

In consideration of the relationship between the two variables of plan effectiveness and plan inclusion or lack of inclusion of sufficient guidance for implementation, the chi-square analysis of **gated** responses shows a p-value of 0.000. Such a low p-value demonstrates a clear dependency between variables, negating the conclusion of a null-hypothesis.

Figure 7.21 demonstrates that, of **gated** respondents who indicated that their community’s plan includes sufficient guidance for implementation, most, 79%, consider their economic development efforts as either “effective” or “very effective.” Only 5% of respondents considered their plans as either “ineffective” or “very ineffective,” and 16% considered their plans to have a neutral impact.

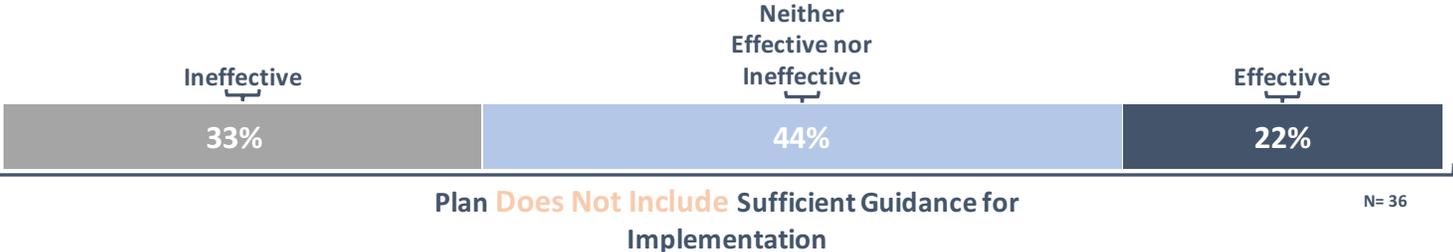
Figure 7.21: Strategic Economic Development Plan Includes Sufficient Guidance for Implementation, Consideration of Plan’s Effectiveness (Gated)



Source: Community Service Center, 2017.

Figure 7.21 demonstrates that, of **gated** respondents who indicated that their plan does not include sufficient guidance for implementation, 22% consider their plan to be “effective,” and 0% consider their plan to be “very effective.” Most respondents consider their plans as being either “ineffective,” 33%, or as having a neutral impact, 44%.

Figure 7.21: Strategic Economic Development Plan Does Not Include Sufficient Guidance for Implementation, Consideration of Plan’s Effectiveness (Gated)



Source: Community Service Center, 2017.

CONSIDERATION OF PLAN’S SUCCESS

In consideration of the relationship between the two variables of plan success and plan inclusion or lack of inclusion of sufficient guidance for implementation, the chi-square analysis of **gated** responses shows a p-value of 0.000. Such a low p-value demonstrates a clear dependency between variables, negating the conclusion of a null-hypothesis.

Figure 7.22 demonstrates that, of **gated** respondents who indicated that their plan includes sufficient guidance for implementation, most, 66%, consider their economic development efforts as either “effective” or “very effective.” A small portion of respondents, 2%, consider their efforts as “very unsuccessful,” and 31% consider their efforts as having a neutral impact.

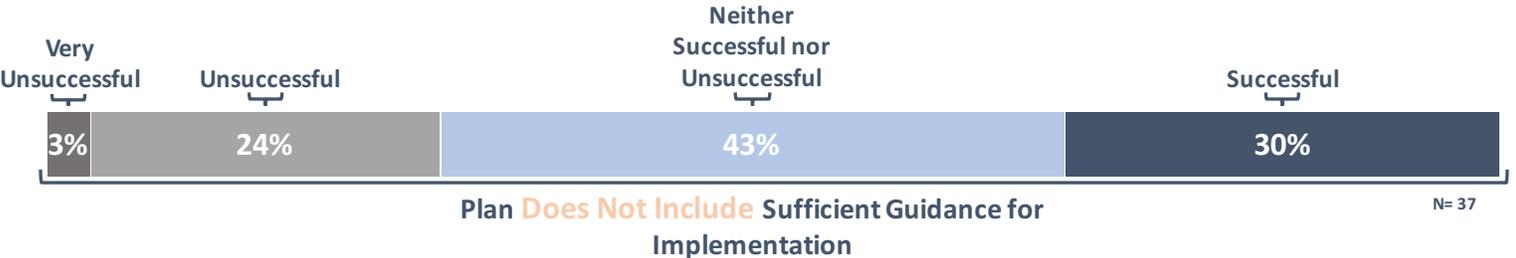
Figure 7.22: Strategic Economic Development Plan Includes Sufficient Guidance for Implementation, Consideration of Plan’s Success (Gated)



Source: Community Service Center, 2017.

Figure 7.23 demonstrates that, of **gated** respondents who indicated that their plan does not include sufficient guidance for implementation, 30% consider their economic development efforts as “successful,” and 0% consider their efforts as “very successful.” Most respondents consider their efforts as either “unsuccessful” or “very unsuccessful,” 27%, or as having a neutral impact, 43%.

Figure 7.23: Strategic Economic Development Plan Does Not Include Sufficient Guidance for Implementation, Consideration of Plan’s Success (Gated)



Source: Community Service Center, 2017.

SUMMARY

Finding 3.4 demonstrates clearly the relationship between the two variables of sufficient guidance for implementation and perceptions of the positive impact of plans. In both cases, measures of effectiveness and success in relation to sufficient guidance show p-values well below the minimum standard of 0.05.

If communities include **any** sufficient guidance for implementation of their strategic economic development plans, a higher perception of effectiveness and success is evident. In both cases, of effectiveness and success, the positive perception by professionals of communities with sufficient implementation guidance on economic development, is over double the proportion of respondents who indicated that their plans do not include sufficient guidance. It is evident that there is a clear correlation between the perception of a positive impact of economic development and sufficient guidance for implementation.

FINDING 3.5: OF GATED RESPONDENTS, THOSE WHO INDICATED THAT THEIR STRATEGIC ECONOMIC DEVELOPMENT PLAN INCLUDES A PROCESS FOR REVISION ALSO INDICATED A HIGHER PERCEPTION OF PLAN EFFECTIVENESS AND SUCCESS.

Finding 3.5 presents **gated** responses from professionals who indicated that their community’s economic development plans include or do not include a defined process for update and revision. The definition of “defined process for update and revision” was left up to the professional’s own opinion, but as noted in **Figure 4.6** in **Key Findings Section I**, most respondents, 62%, indicated that their community’s plan is updated or revised between 12 months and five-years.

CONSIDERATION OF PLAN’S EFFECTIVENESS

In consideration of the relationship between the two variables of plan effectiveness and plan inclusion or lack of inclusion of a process for update and revision, the chi-square analysis of **gated** responses shows a p-value of 0.091. A p-value above the chosen significance level of .05 demonstrates the possibility of independent variables, making the determination of a null-hypothesis possible.

Figure 7.24 demonstrates that, of **gated** respondents who indicated that their community’s plan includes a defined process for update ad revision, most, 77%, consider their plan as either “effective” or “very effective.” A small percentage, 10% consider their plan either “ineffective” or “very ineffective,” and 16% consider their plan to have a neutral impact.

Figure 7.24: Strategic Economic Development Plan Includes Defined Process for Update and Revision, Consideration of Plan’s Effectiveness (Gated)



Source: Community Service Center, 2017.

Figure 7.25 demonstrates that, of **gated** respondents who indicated that their community’s plan does not include a defined process for update and revision, 50% consider their plan either “effective” or “very effective.” Nineteen percent of respondents consider their plans as “ineffective,” and 31% consider their plans to have a neutral impact.

Figure 7.26: Strategic Economic Development Plan Does Not Include Defined Process for Update and Revision, Consideration of Plan’s Effectiveness (Gated)



Source: Community Service Center, 2017.

CONSIDERATION OF PLAN’S SUCCESS

In consideration of the relationship between the two variables of plan success and plan inclusion or lack of inclusion of a process for update and revision, the chi-square analysis of **gated** responses shows a p-value of 0.421. A p-value above the chosen significance level of .05 demonstrates the possibility of independent variables, making the determination of a null-hypothesis possible.

Figure 7.27 demonstrates that, of **gated** respondents who indicated that their community’s plan includes a defined process for update and revision, most, 63%, consider their plan as either “successful” or “very successful.” A small percentage, 6% consider their plans as either “unsuccessful” or “very unsuccessful,” and 30% consider their plans to have a neutral impact.

Figure 7.27: Strategic Economic Development Plan Includes Defined Process for Update and Revision, Consideration of Plan’s Success (Gated)



Source: Community Service Center, 2017.

In comparison to **Figure 7.27**, **Figure 7.28** demonstrates that, of **gated** respondents who indicated that their community’s plan does not include a defined process for update and revision, 47% still consider their plans as either “successful” or “very successful.” Forty-two percent of respondents consider their plan to have a neutral impact, and 11% consider their plan either “unsuccessful” or “very unsuccessful.”

Figure 7.28: Strategic Economic Development Plan Does Not Include Defined Process for Update and Revision, Consideration of Plan’s Success (Gated)



Source: Community Service Center, 2017.

SUMMARY

Finding 3.5 demonstrates that the relationship between the two variables, a process of plan update and revision, and perceptions of the positive impact of plans may be independent of each other. Both cross tabulations of data show a chi-square p-value greater than the chosen significance level of 0.05. In the case of plan success, the p-value is over 40%, allowing for the conclusion that there is **no** association between the two variables.

PART VIII – DISCUSSION OF FINDINGS

A clear gauge of current perceptions of professionals on the effectiveness and success of economic development planning allows for a more comprehensive discussion of the status of economic development planning in the State of Oregon. Oregon has continually lagged behind its coastal neighbors in the archetypal economic development metrics of job growth, wage growth, and lessening of unemployment. Explaining Oregon’s lag in the eyes of planners allows for an understanding of how Oregon can move forward through better planning to improve the economic position of the State.

EXTENSION BEYOND GOAL 9

The data presented in this document presents a strong correlation between the positive perceptions of professionals on strategic economic development plans and the inclusion of plan elements beyond Goal 9 requirements. Sixty-three percent of **gated** respondents who indicated that their plan extends beyond Goal 9 requirements consider their plan as at least “effective,” and 55% consider their plan as at least “successful.” In comparison, 45% of **ungated** respondents consider their plan as at least “effective” and 39% as at least “successful.”

The question of planning beyond Goal 9 requirements is important because it is a minimum threshold for planning for economic development in Oregon. If a community plans beyond it, they can be considered to have a higher level of commitment than a neighbor who does not. Seventy-one percent of respondents said that their community plans beyond Goal 9 requirements. This demonstrates that the majority of communities in Oregon engage in some form of strategic planning in economic development.



71%
SAY THEIR COMMUNITY
PLANS BEYOND GOAL 9
REQUIREMENTS.

The information provided here is informative due to the open nature of the question. Allowing for professionals to create their own definition of plan extension beyond Goal 9 requirements leaves the spectrum of plan extension very wide. Goal 9’s requirements for communities are limited. As outlined in the **Literature Review** section, Oregon only requires communities to engage in an economic opportunity analysis that reviews local, county, state, regional and national economic trends, and in some cases small towns are exempt from ever reviewing or updating their Goal 9 elements. Each municipality must inventory commercial and industrial lands, and assess their community’s economic potential. The analysis provides a framework for municipalities to base their strategic economic development plans. A framework is just a basis to establish an economic development plan. In this way, asking professionals whether their community’s economic development efforts extend beyond a framework to establish a plan is essentially just asking them if their community does anything at all.

Gated behind the question regarding plan extension, the survey included another broadly defined question on plan inclusion of “sufficient guidance for implementation.” As addressed in **Key Findings**

Section III, this question did not define “sufficient guidance for implementation,” allowing for respondents to establish their own definition in the context of their communities. The open-ended nature of this question is a furtherance of the evidence presented above. Not defining “sufficient guidance” allows the survey to gather further evidence of the perceptions of respondents on the impact of any economic development planning beyond Goal 9 requirements. In this case, 79% of respondents indicated that their community’s plan is at least “effective,” and 66% indicated it as at least “successful.” Results of chi-square analyses on sufficient implementation guidance show $p = <0.05$, demonstrating dependency between variables. This provides further evidence that any effort beyond Goal 9 requirements has a positive impact.

It should also be noted that, by establishing that efforts beyond Goal 9 increase effectiveness and success of economic development in communities, we tentatively establish that economic development planning positively impacts economic growth in Oregon.

POSITIVE IMPACT OF INCREASED PLAN ROBUSTNESS

In this project I have concluded that any extension beyond Goal 9 requirements provides a positive perception of plan impact for economic development in communities, but does that positive perception increase with plan robustness? Robustness in this case is considered as a community’s plan including any of the following: specific implementation frameworks, evaluative metrics, sufficient guidance for implementation (discussed in **Extension Beyond Goal 9**), or a defined process for revision.

The survey included multiple questions regarding the robustness of existing economic development plans in communities. In **Key Findings Section III**, we addressed the perceived effectiveness and success of those plan additions. The overall conclusion of those findings is that with increased plan robustness comes increased perceived levels of positive plan impact for communities. The most interesting findings on plan robustness are regarding plan inclusion of specific implementation frameworks and evaluative metrics. These two categories are especially interesting because both were asked twice: once, **gated** behind the earlier question regarding plan extension beyond Goal 9 requirements, and once, **ungated**, providing a wider breadth of perceptions of survey respondents.

In consideration of a plan’s inclusion of a specific framework for implementation, of **gated** respondents, 66% indicated that their plan includes a specific framework for implementation. Of those 66% of respondents, 81% consider their community’s plan as at least “effective” and 70% consider it as at least “successful.” This is a marked increase over perceived positive impact from extension beyond Goal 9 requirements, showing ~20% increase in both instances. Of **ungated** responses, the increase in positive perception is even greater, with 82% considering their community’s plan as at least “effective” and 76% considering it as at least “successful.” This correlation between positive perception and the inclusion of specific implementation frameworks is supported by chi-square analyses every case of $p = < 0.05$, which demonstrates that the variables are dependent on one another.

In consideration of a plan’s inclusion of evaluative metrics, of **gated** respondents, 86% consider their community’s plan as at least “effective,” and 74% consider it as at least “successful.” Once again, this shows a marked increase over perceived positive impact from extension beyond Goal 9 requirements,

showing ~20% increase in both instances. Of **ungated** responses, the increase of positive perception is once again even greater: 82% of respondents consider their community’s plan as at least “effective,” and 75% consider it as at least “successful.” The correlation here, of positive perception and the inclusion of evaluative metrics, is also supported by chi-square analyses in every case of $p = < 0.05$, which demonstrates dependent variables.

This data directly demonstrates a correlation between plan robustness and perceptions of success. The survey question regarding plan inclusion of plan revision processes provide similar results to those provided above, but the question did not satisfy the minimum threshold for p-values, and therefore the results are inconclusive.

CORRELATIONS IN PLAN ROBUSTNESS

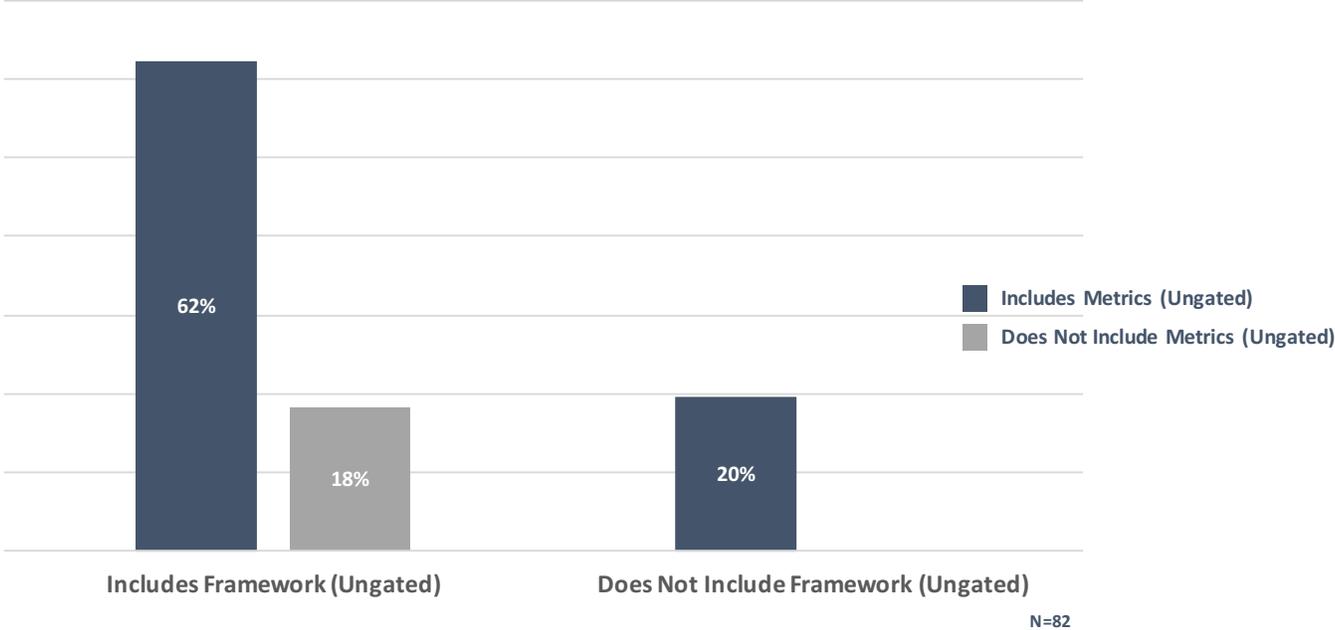
In **Key Findings Section II**, we addressed the extent of plan robustness in communities by cross-tabulating **gated** and **ungated** survey responses regarding the inclusion of specific implementation frameworks or evaluative metrics. The results of this section are particularly interesting for this study because they help us understand whether there is a separation between communities who have robust plans and those who do not. This data demonstrates whether those communities who already engage in one form of more robust planning, such as including a specific implementation framework, are more likely to also include another form. Responses demonstrate that communities who plan beyond Goal 9 requirements also have a higher rate of inclusion of robust plan elements. In other words, in contrast to the findings of Morrison, Halkett and Stolarick, while communities who do engage in strategic planning **do it wrong**, most communities in Oregon are **doing it right**.



Finding 2.1 demonstrates that, of **ungated** respondent’s communities, 57% include neither a specific framework for implementation nor evaluative metrics. This result shows that there is relative consistency in responses; if a community’s plan does not include one robust extension, it is unlikely to include a different extension as well. Sixteen percent of respondents said their community has one or the other, and 27% said their community has both. In this case, demonstrated in **Figure 8.1**, if the population of respondents who indicated a null response are removed, 62% of respondents indicated their plan includes both specific implementation frameworks and evaluative metrics.

Figure 8.1: Strategic Economic Development Plan Robustness, Inclusion of Specific Implementation Framework, Evaluative Metrics, or Both (Ungated, Exclusion of Null Results)

Plan Includes Implementation Framework (Ungated) vs. Plan Includes Evaluative Metrics (Ungated)

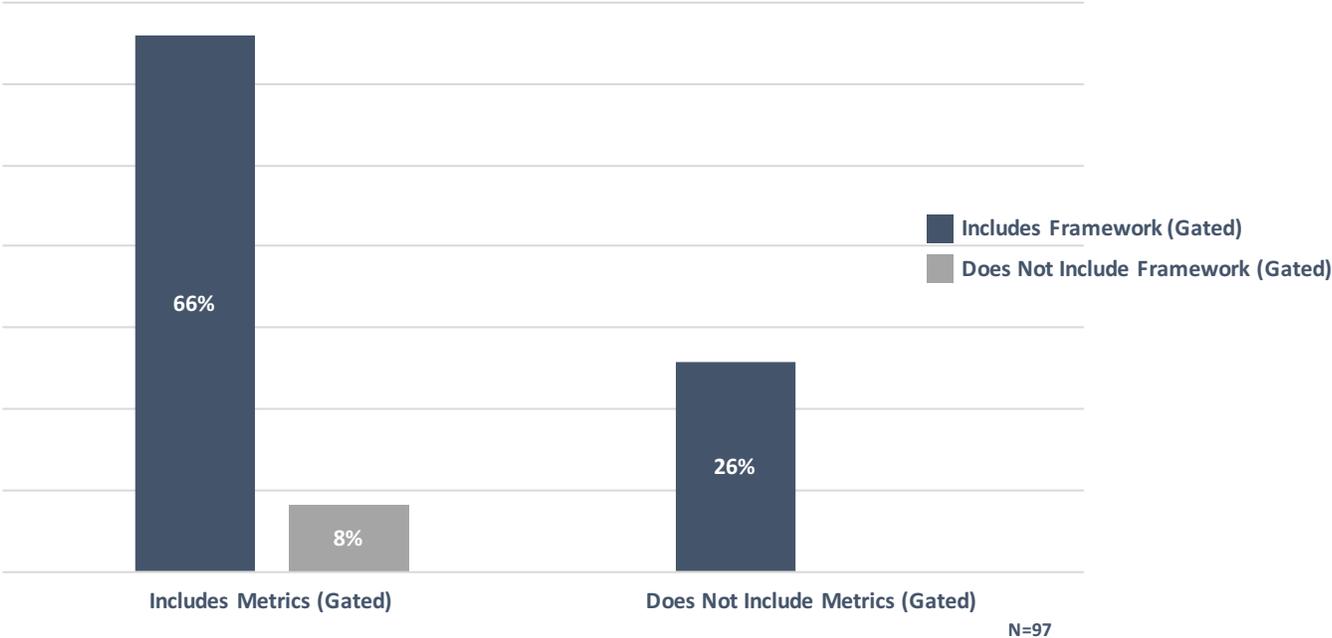


Source: Community Service Center, 2017.

Finding 2.2 demonstrates that, of **gated** responses, 30% of communities include neither a specific framework for implementation nor evaluative metrics. **Figure 8.2** demonstrates that, if the population of respondents who indicated a null response are removed, 66% of respondents indicated that their plan includes both specific implementation frameworks, and evaluative metrics.

Figure 8.2: Strategic Economic Development Plan Robustness, Inclusion of Specific Implementation Framework, Evaluative Metrics, or Both (Gated, Exclusion of Null Results)

Plan Includes Evaluative Metrics (Gated) vs. Includes Implementation Framework (Gated)



Source: Community Service Center, 2017.

The data shown here demonstrates that if a community includes a single aspect of robustness in their economic development efforts, they are more likely to also include others. In both cases of **ungated** and **gated**, most respondents include both specific framework for evaluation and evaluative metrics. As demonstrated in **Positive Impact of Increased Plan Robustness**, communities that include plan extensions beyond Goal 9 requirements show a higher perception of positive plan impact than those who do not. In correlation with this information, it can be considered likely that the communities shown in **Figure 8.1** and **Figure 8.2** would have even higher rates of positive perception of plans.

RELATIONSHIPS BETWEEN VARIABLES – SUGGESTED FURTHER RESEARCH

This discussion section establishes the positive correlation between the extension of community’s economic development plans beyond Goal 9 requirements, the inclusion of implementation frameworks, and plan effectiveness and success. The data presented in this analysis points towards a relationship between plan robustness and positive plan impact, but it is not clear whether there are other factors influencing the perceived positive impact of plans.

LIMITATIONS OF RESEARCH

- RESEARCH IS BASED ON A SURVEY OF PERCEPTIONS OF PEOPLE WHO WORK IN ECONOMIC DEVELOPMENT

A survey of the perceptions of professionals is possible limited because respondents may color their responses based on their own job security, answering that plans have a positive impact solely because their job depends on it having a positive impact.

- NO IN DEPTH ANALYSIS OF THE ECONOMIC CLIMATE OF RESPONDENT’S COMMUNITIES

The information presented in this report is solely a representation of the perceptions of survey respondents and is not backed up by an analysis of each individual community’s economic climate. Therefore there is no demonstration of the validity of responses.

- RELATIONSHIP BETWEEN VARIABLES IS ESTABLISHED BUT UNCLEAR

In nearly every case of cross-tabulation included in this study, the p-value, or the relationship between variables, is below the decided minimum threshold of $p < 0.05$, a less than 5% chance that variables are independent. However, without further in depth analysis of the economic climate of respondent’s communities, or a regression analysis of the relationship between variables, it is not possible to concretely establish that variables are completely dependent on one another.

SUGGESTED FURTHER RESEARCH

- IN DEPTH ANALYSIS AND COMPARISON OF SURVEY RESPONSES TO CURRENT ECONOMIC CLIMATE IN RESPONDENT COMMUNITIES **(EXIT PROJECT OPPORTUNITY)**

- FURTHER STATISTICAL ANALYSIS OF SURVEY RESPONSES TO DETERMINE ACTUAL NATURE OF RELATIONSHIP BETWEEN VARIABLES **(IN PROGRESS)**

- FURTHER STATISTICAL ANALYSIS OF THE RELATIONSHIP BETWEEN PLAN ROBUSTNESS AND POSITIVE PERCEPTIONS ON IMPACT **(IN PROGRESS)**

APPENDIX A - SURVEY

Within this section is a partial copy of the survey developed by Bob Parker and I in conjunction with the Community Service Center and the Economic Development Administration. Questions unrelated to this study are removed.

SOLICITATION EMAIL

We need your help!

We are conducting a survey of economic development professionals and individuals involved in establishing and implementing local and regional economic development efforts. Your responses to this survey will improve our understanding of the economic development needs and opportunities of communities in Oregon.

This survey is being conducted by the University of Oregon Community Service Center (CSC); the Center provides technical assistance to businesses and communities in Oregon with the purpose of improving economic conditions. The CSC is partnering with the League of Oregon Cities (LOC) and the Oregon Economic Development Association (OEDA) to conduct this research. The CSC will use the survey results to better understand what economic development strategies communities are using, how they are implementing the strategies, and how effective their economic development programs are. The results will be shared with LOC, OEDA, Business Oregon and other economic development agencies throughout Oregon.

Your participation in this research is voluntary, by choosing to participate you agree for your responses to be used for the purposes stated above. If at any point during the survey you choose to end your participation, you may stop the survey by exiting the browser window and your responses will not be recorded. While we cannot guarantee confidentiality, we will neither share your personal information with anyone other than those involved in the research, nor will we associate any personal information with your survey responses in the final report. Completing this survey is your agreement to participate in the research. The survey will take 10-20 minutes to complete.

If you have any questions regarding this research, or wish to have a copy of this consent form sent by email, contact Robert Parker at (541) 346-3801 or rgp@uoregon.edu. If you have any questions regarding your rights as a research subject, please contact the Office for Protection of Human Subjects at the University of Oregon, (541) 346-2510. Thank you for your participation.

SURVEY

INSTRUCTIONS

Please answer the questions to the best of your ability. While we cannot guarantee confidentiality, we will not attribute personal information to survey responses and individual responses will be kept anonymous.

The survey will take 10-20 minutes to complete. Your participation is voluntary. If you do not wish to participate, you may stop at any time. Completing this survey is your agreement to participate in the research.

Click Next>> to start the survey.

1. How important or not important do you consider economic development to be to economic growth in the State of Oregon?
 - a. Not at All Important
 - b. Not Important
 - c. Somewhat Important
 - d. Important
 - e. Very Important
 - f. Don't Know

2. How important do you consider economic development relative to other services provided by local governments (e.g., public safety, infrastructure, parks, etc.)?
 - a. Much less Important
 - b. Less Important
 - c. About the same importance
 - d. More Important
 - e. Much More Important
 - f. Don't Know

3. If the success of economic development activities is defined as job and wage growth, and economic diversification, in your opinion, what is the current state of economic development in Oregon?
 - a. Not at all successful
 - b. Not successful
 - c. Somewhat successful
 - d. Successful
 - e. Very successful
 - f. Don't Know

-
4. What type of organization/agency are you representing as you fill out this survey? *(Please select one)*
 - a. Government (State, County, Local, Tribal, Chamber)
 - b. Non-Profit Organization
 - c. Economic Development Organization
 - d. Citizen or Community Group
 - e. Elected Official
 - f. Private Business
 - g. Other (please specify)

 5. How active is your organization in economic development planning and implementation?
 - a. Not at all active
 - b. Not active
 - c. Somewhat active
 - d. Active
 - e. Very active
 - f. Don't Know

 6. Which best describes the focus of your professional work? *(Please select one)*
 - a. Local
 - b. Regional
 - c. State

EXISTING PLANS AND STRATEGIES

Please tell us about your community's economic development strategy. In this case, *community* refers to the entity with which you are involved with, whether that be local, state, or regional government, or a nonprofit economic development organization.

7. Other than the Oregon Statewide Planning Goal 9 element of the local or county comprehensive plan, does your community have expressly stated economic development goals, strategies, or policies?
 - a. Yes
 - b. No
 - c. Don't know

If they answer yes to Q7 then ask this: Please indicate whether your economic development strategy:

	Yes	No	Don't Know
Was formally adopted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Includes target industries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Includes sufficient guidance for implementation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Includes specific framework for implementation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Includes indicators or metrics that allow evaluation of impact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Includes a vision statement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Includes a defined process for update and revision	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- a. If no to 5, does your community want an economic development strategy?
 - i. Yes
 - ii. No

- b. If indicated existence of target industries: please list the three most important target industries in your community's economic development strategy:
 - i.
 - ii.
 - iii.

- c. If indicated specific framework for implementation: what is your framework for implementation?
 - i. Open ended

- d. If indicated defined process for update and revision: how frequently does your community update and revise your strategies, goals, or implementation action plans?
 - i. 0 - 6 months
 - ii. 6 - 12 months
 - iii. 12 months – 2 years
 - iv. 2 years – 5 years
 - v. 5+ years
 - vi. No regular schedule
 - vii. Do not revise

-
8. If you are familiar with the process used to develop the goals, strategies or implementation actions, please indicate who was involved in the process: (Check all that apply) (note – this question will use display logic for individuals that indicate an answer of yes to Question 5)
- i. I am not familiar with the planning process
 - ii. Business representatives
 - iii. Public employees
 - iv. Local, state or federal government representatives
 - v. Nonprofit representatives
 - vi. Local experts
 - vii. Chamber of commerce
 - viii. University or community college
 - ix. School district
 - x. General public
 - xi. Youth
 - xii. Other. Please specify:

PLAN EFFECTIVENESS

9. In your opinion, how effective or ineffective is your current economic development strategy at achieving community economic development objectives?
- i. Very Ineffective
 - ii. Ineffective
 - iii. Neither Effective nor Ineffective
 - iv. Effective
 - v. Very Effective
 - vi. Don't Know
- a. Does your strategy include metrics, indicators, benchmarks or other tangible means of monitoring outcomes?
- i. Yes
 - ii. No
 - iii. Don't know

If yes...

If indicated evaluative framework for success: Please describe your community's specific metrics, indicators, or benchmarks used to determine the success of strategies, goals, or implementation actions plans for economic development (for example: *increase jobs by X percent*).

10. Does your current economic development strategy outline clearly an implementation framework or an action plan? E.g. Who does what, when and how?
- a. Yes
 - b. No
 - c. Don't Know

-
11. If success is defined as accomplishing the goals of your economic development strategy, in your opinion, please indicate how successful or unsuccessful your community's economic development strategy is:
- i. Very unsuccessful
 - ii. Unsuccessful
 - iii. Neither successful nor unsuccessful
 - iv. Successful
 - v. Very successful
 - vi. Don't know
- a. Please explain your response to the previous question regarding the success of your community's economic development strategy:

RESPONDENT INFORMATION

In this section of the survey we would like to learn about your professional role in economic development in your community. Please answer the questions to the best of your ability. While we cannot guarantee confidentiality, we will not attribute personal information to survey responses and individual responses will be kept anonymous.

12. Please tell us about yourself:

- a. First Name
- b. Last Name
- c. Email Address
- d. Name of your Agency/Organization
- e. Work Address
- f. City
- g. Zip Code

13. How many years have you worked in economic development?

14. Do you consent to be added to our interview pool to further our research at a later date?

- a. Yes
- b. No

15. Do you consider your area urban or rural?

- a. Urban
- b. Rural

16. Is there anything else you would like to tell us? Please write any other comments you have in the space below:

Thank you for taking the time to complete this survey.

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