



BC NATURAL RESOURCES  
FORUM



iTOTEM  
ANALYTICS

# The 2024 BC Natural Resources Forum

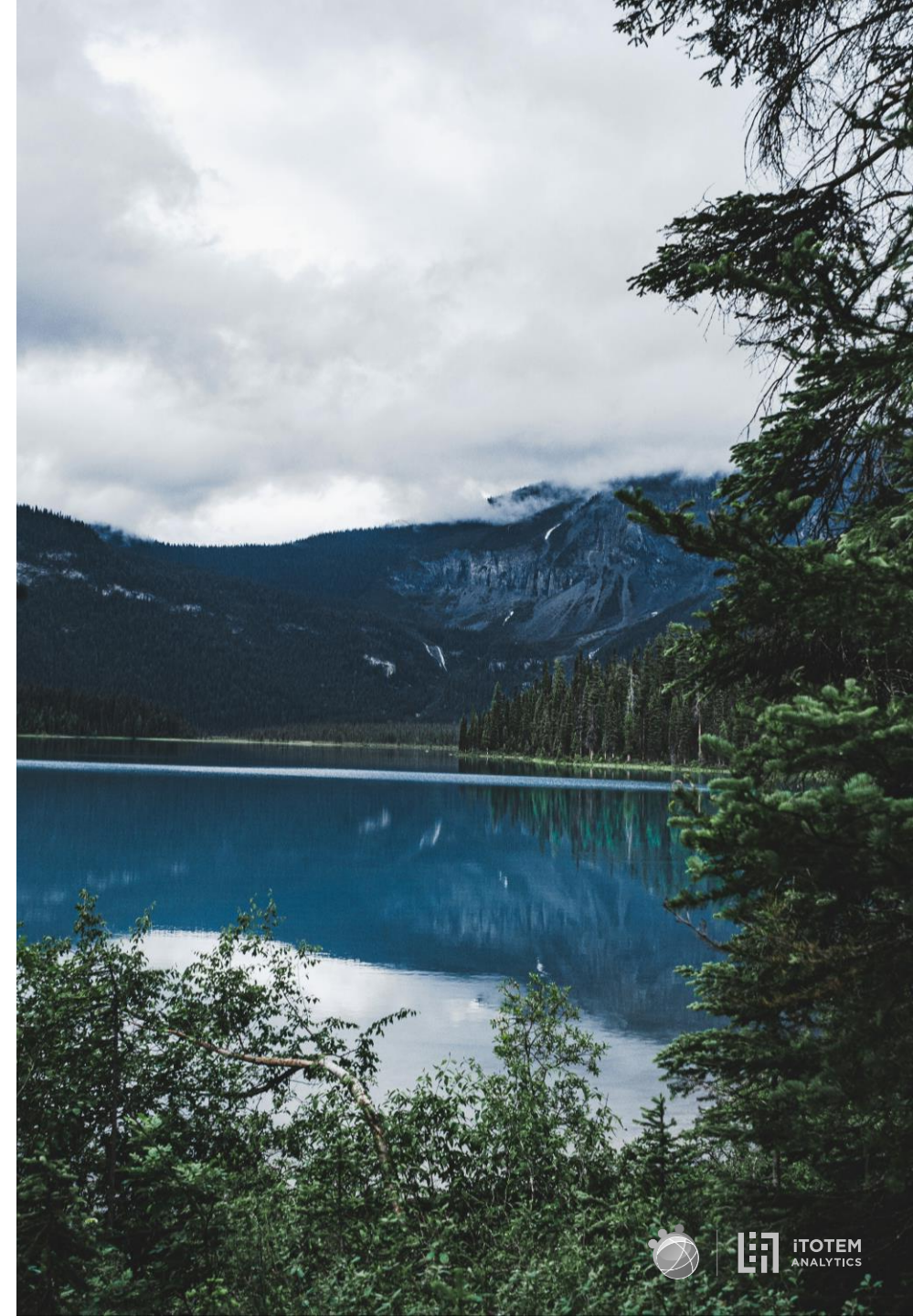
## TRUST INDEX

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# The Natural Resource Trust Index

- The Natural Resource Trust Index (NRTI) is a collaboration between the BC Natural Resources Forum (C3 Alliance) and iTOTEM Analytics.
- NRTI was developed with the following objectives:
  - Capture and record a snapshot of the collective sentiment on trust in the BC Natural Resource sector in 2024.
  - Support the establishment of local benchmarks for trust and perception, guiding continuous improvement.
  - Harness strategic insights to enhance the BC Natural Resource Forum experience and to catalyze pivotal discussions regarding the sector's future direction.
- The inaugural NRTI survey results were reported at the 21st Annual BC Natural Resources Forum held in Prince George Jan. 16-18, 2024.



# Report Structure

The NRTI Report comprises four sections.

## SECTION ONE

Framework, Participation & Methodology

## SECTION TWO

Key Insights by of the NRTI

## SECTION THREE

Key Insights by Dimension

## SECTION FOUR

Information about the Team



# Framework, Participation & Methodology

SECTION ONE

# 5-Part Design Framework

Framework Focus	Description	
<p><b>ONE</b> <b>Objectives</b></p>	<p>Aligned with the Organization for Economic Cooperation and Development's (OECD) <b>Guidelines on Measuring Trust</b>, the objectives of the NRTI initiative are to:</p> <ul style="list-style-type: none"> <li>• Capture and record a snapshot of the collective sentiment on trust in the natural resource sector in 2024.</li> <li>• Support the establishment of local benchmarks for trust and perception, guiding continuous improvement.</li> <li>• Harness strategic insights to enhance the Natural Resource Forum experience and to catalyze pivotal discussions regarding the sector's future direction.</li> </ul>	
<p><b>TWO</b> <b>Attributes of Trust</b></p>	<p style="text-align: center;"><b>Description of Process</b></p> <p>Defining the attributes of trust ensures that the NRTI provides clear, actionable, and relevant data that the sector can use to foster a more trustworthy Natural Resource sector.</p> <p>Selecting the appropriate attributes of trust for the NRTI involved:</p> <ul style="list-style-type: none"> <li>• A literature review and best practices guided by global frameworks</li> <li>• Consulting with Indigenous Peoples and stakeholders ensuring that the attributes are inclusive and reflect the concerns and values of all parties</li> <li>• Domain expertise and an understanding of the sector specific challenges, environmental impact, economic sustainability, and social responsibility</li> <li>• Data science durability: clear, distinct, quantifiable, and benchmarkable data which includes both a balance of subjective and objective measures</li> </ul>	<p style="text-align: center;"><b>Attributes of Trust</b></p> <p>In calculating trust in the Natural Resource sector, the NRTI weighted the following attributes against the survey questions:</p> <ul style="list-style-type: none"> <li>• Cohesive commitment</li> <li>• Ethical conduct</li> <li>• Inclusivity</li> <li>• Reliability</li> <li>• Responsiveness.</li> <li>• Transparency</li> </ul>
<p><b>THREE</b> <b>Survey Structure</b></p>	<p>The NRTI survey questions were categorized into five dimensions, like a checklist that together create a full picture of trust in BC's Natural Resources sector. The five dimensions are:</p> <p>1. Leadership    2. Shared value creation and community progress    3. Indigenous participation and economic reconciliation    4. Government collaboration    5. Climate and resiliency</p>	
<p><b>FOUR</b> <b>Timeline</b></p>	<p>The NRTI survey was distributed by email and conducted remotely from December 20 to January 08, 2023, to enrich discussions at the Forum with up-to-date and relevant insights.</p>	
<p><b>FIVE</b> <b>Data Science Methodology</b></p>	<p>The survey was anonymous. Responses in the NRTI survey were quantified using a numerical scale from 1 (lowest performance) to 10 (highest performance), with the average determining the '2024 Natural Resource Trust Index'. This score represents the aggregated trust perception in the Natural Resource sector among the BC Natural Resources Forum community. The attributes of trust created for this index help evaluate types of trust that are lacking, and which are exceling within the sector. Indicators which covered a broader range of attributes were weighted higher for significance in facilitating trust. Additionally, the response distribution was analyzed to gauge consensus and diversity in viewpoints across different backgrounds. Analysis techniques included measures of standard deviation, response categorization, and cross-tabulation to identify variations in perceptions among various entity groups. These statistical methods were used to transform subjective perceptions into actionable insights intended to inform policy and best practices within the sector.</p>	

# Scoring Methodology

The data collected as part of this survey represent people with interest in the natural resource sector from different age, gender, ethnicity, and locality groups.

## Questions were weighted based on:

Trust Attribute Alignment – questions which aligned with more trust attributes had higher weights.

Participation Rate – questions which had higher participation rates had higher weights, however based on the standard deviation in participation rates (17\* responses) this weighing changed the final scores by a percent difference of less than 0.3%\*.

Questions were weighted so that each Trust Dimension ('Leadership', 'Shared Values', etc.) equally contributed to the final score (20% each), with slight deviations on the final score based on the participation rates per the above.

1 / 10	Completely
2 / 9	Very
3 / 8	Reasonably
4 / 7	Somewhat
5 / 6	Slightly

\* Numbers are based on the aggregate report only.

# Participation Rates

For the purposes of NRTI, the natural resource sector is broadly defined as individuals and groups, including those interested in the industry's future, regulatory authorities, proponents and operators, suppliers, educators, non-governmental organizations, elected officials, Indigenous peoples, and all citizens of the province of British Columbia. Each of these groups plays a distinct role in the stewardship and development of natural resources, as well as the consumption of products and services enabled by its industries.



**382**  
Participants

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Ages 1940 - 2000+  
1,400 registered delegates to the Natural Resource Forum.

**5**  
Provinces / Territories

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Alberta, BC, Ontario, Quebec, and Saskatchewan.  
Led by BC.

**26**  
Organizational Types

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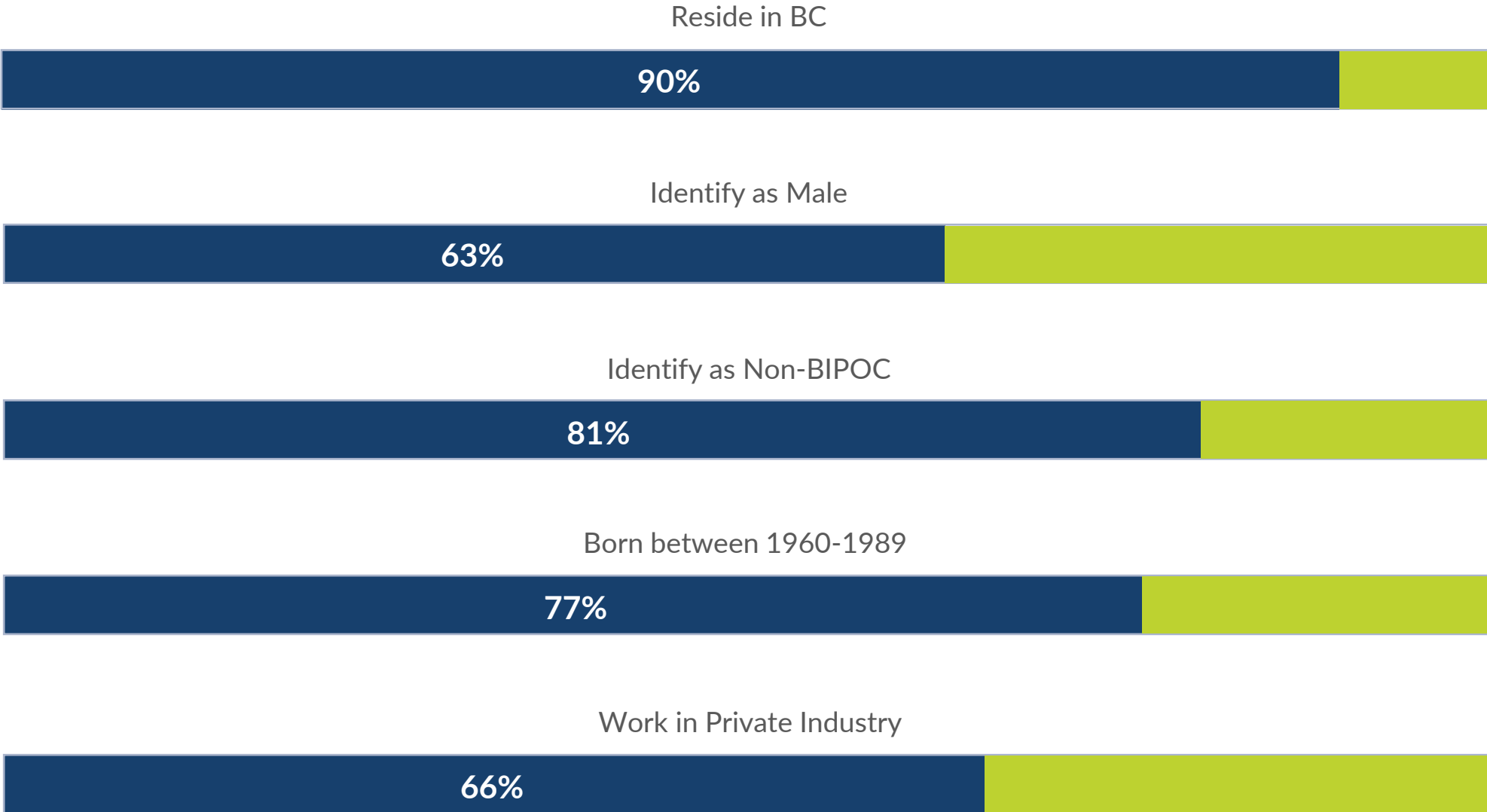
Academia, Community Groups, ENGOs, Government, Industry, and Service Sector.

**15%**  
Indigenous Participation

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Indigenous Governments, Economic Development and Not-for-Profit.

# Participation Demographics by Majority Category





# Trust Dimensions

## Leadership

Evaluates how well the natural resource sector's leaders engage stakeholders in addressing societal issues, maintain data reliability, and communicate effectively. This facet of the Trust Index highlights the sector's commitment to transparency, collaborative problem-solving, and sustainable development.

3 Questions

341 Participants on Average

## Shared Values

Evaluates the natural resource sector's dedication to fostering community growth and inclusivity. It gauges trust by examining community engagement levels, the impact of investments on local development, and the sector's efforts in promoting workforce inclusivity.

4 Questions

340 Participants on Average

## Indigenous Reconciliation

Evaluates the partnership between the natural resource sector and Indigenous communities. This part of the survey assesses equitable economic collaboration, the integration of Indigenous knowledge in resource management, the consistency of cultural training for industry workers, and the sector's commitment to enhancing Indigenous employment opportunities.

5 Questions

329 Participants on Average

## Government Collaboration

Focuses on the interactions between the natural resource sector and various levels of government. This section aims to assess the efficacy of these relationships in achieving outcomes that are not only beneficial to both parties but also respectful of Indigenous rights and supportive of sustainable development practices.

5 Questions

312 Participants on Average

## Climate & Resiliency

Assesses how the natural resource sector is navigating climate change and technological evolution. It gauges stakeholder trust in the sector's commitment to sustainable practices and future-proofing against environmental and tech-driven shifts, aiming to ensure resilience and prosperity in a changing world.

2 Questions

307 Participants on Average

# Attributes of Trust Measured



## Cohesive Commitment

Despite potentially differing viewpoints, the extent to which there is a diverse, unified buy-in and a cohesive approach to the sector's processes and goals.



## Inclusivity

The extent of engagement with diverse groups, with a particular emphasis on respecting the principle of 'free, prior, and informed consent' from Indigenous communities as rights and title holders.



## Ethical Conduct

Adherence to ethical practices and respect for diverse social, environmental, and cultural values.



## Reliability

The sector's consistency and dependability in fulfilling commitments.



## Responsiveness

The sector's capacity to address stakeholder concerns effectively and promptly.



## Transparency

Openness and clarity in communications and information sharing.

# Key Insights

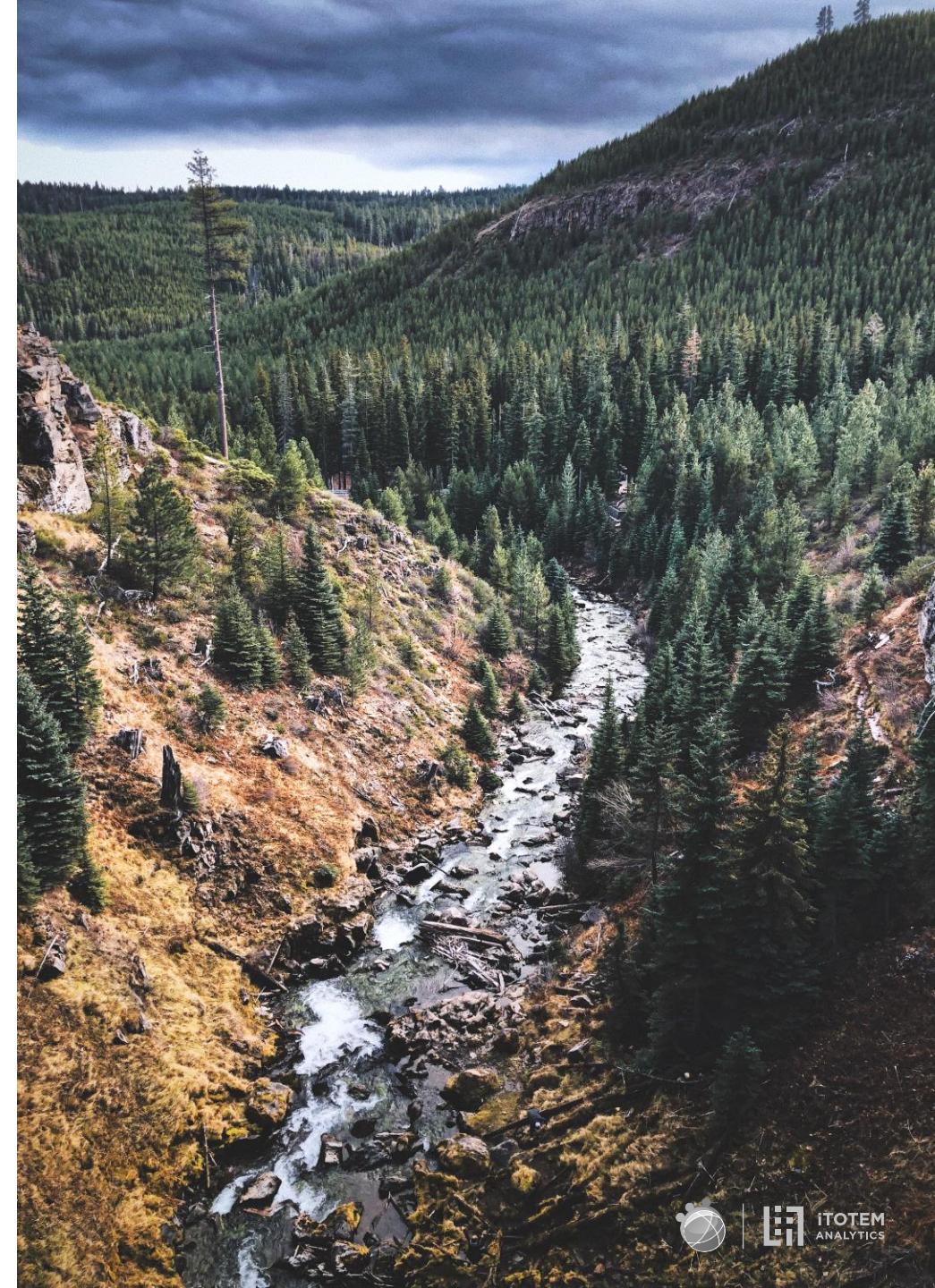
## SECTION TWO



# Aggregate and Participant Trust Results

The results of the inaugural NRTI are presented in aggregate and are representative of the 26 participating groups.

Where appropriate, specific comparisons to Indigenous and other underrepresented groups' responses have been included to provide perspective and to address the opportunity for continual progress.



# Key Insights - Summary

1 Moderate level of trust in a sector **transforming**, strengthened by positive perceptions of **reliable** and transparent communications.

2 Areas of shared experience and cohesive effort, such as safety practices and economic reconciliation, have higher degrees of trust compared to emerging issues such as adapting to climate change and artificial intelligence (AI).

3 Indigenous respondents rated questions about trust in economic reconciliation positively. However, their responses were between 16-27% below the aggregate, reflecting an average of 21% lower trust within the Indigenous Reconciliation dimension.

4 Most groups had similar levels of cohesiveness, however, replies from Indigenous respondents were lower than the aggregate. The *Financial, Insurance, and Legal Services* participant category had the lowest degree of unanimity and trust when compared to other responder categories. The *Technology and Digitization* participant category had the highest degree of agreement.

5 Uncertainty in the efficacy of policymaking collaboration and the natural resource sector's adaptability to climate change and AI led to low trust scores. At the same time, responses, though varied, were overall positive on the question of whether the sector would deliver tangible solutions to key challenges, in the Leadership dimension.

2024 NRTI

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TRUST INDEX SCORE

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5.9

# Natural resource sector is transforming

- The overall Natural Resource Trust Index score of 5.9 reflects a moderate level of trust.
- The average responses for most of the questions were positive, but in the moderate range.
- Examining dimensions and questions with lower scores provides directional feedback on the areas of greatest opportunity for increased dialogue, action and transparency.



## NRTI Score

- Inaugural NRTI Score: 5.9
- Moderate level of trust

Low  
(1 - 4.9)

Moderate  
(5 - 7.9)

High Trust  
(8 - 10)

# Reliability increases trust

- Three dimensions produced higher than average scores, boosted by questions measuring reliability and transparency.
- **Leadership** scored higher due to perceptions of reliable and transparent communications.
- **Indigenous Reconciliation** scored higher on questions about equitable economic opportunities.
- **Shared Values** scored higher on questions about inclusive growth, community empowerment and workforce development.



## Top Dimension Results

- Leadership Dimension: 6.4 points
- Indigenous Reconciliation Dimension: 6.4 points
- Shared Values Dimension: 6.1



# Uncertainty lowers trust

- Two dimensions produced lower than average scores, with low levels of confidence in all of the associated trust attributes.
- Uncertainty in the efficacy of policymaking collaboration and our collective readiness to address climate change and integrate AI responsibly, point to critical areas for strategic action and trust enhancement.



## Lowest Dimension Results

- Government Collaboration: 5.3 points
- Climate and Resiliency: 5.3 points

# Highest/Lowest Dimensions by Group

Lowest Trust Dimension | Highest Trust Dimension

Top Respondent Groups by Dimension Results	Leadership	Shared Values	Indigenous Reconciliation	Government Collaboration	Climate and Resiliency
Academia and Education Forestry Industry Association Liquefied Natural Gas (LNG) Mineral Exploration, Mining and Smelting Oil and Gas			○	○	
Architectural, Construction, Engineering, and Environmental Services Indigenous Government & Organizations Non-Governmental Organization and Citizen-based Groups	○				○
Communications and Advocacy Consulting, and Media Outlets	○			○	
Federal, Provincial or Municipal Government Financial, Insurance, and Legal Services Labour Organizations Power Sector and Energy Efficiency			○		○
Technologies and Digitization	○	○			

# Lower ratings from Indigenous respondents

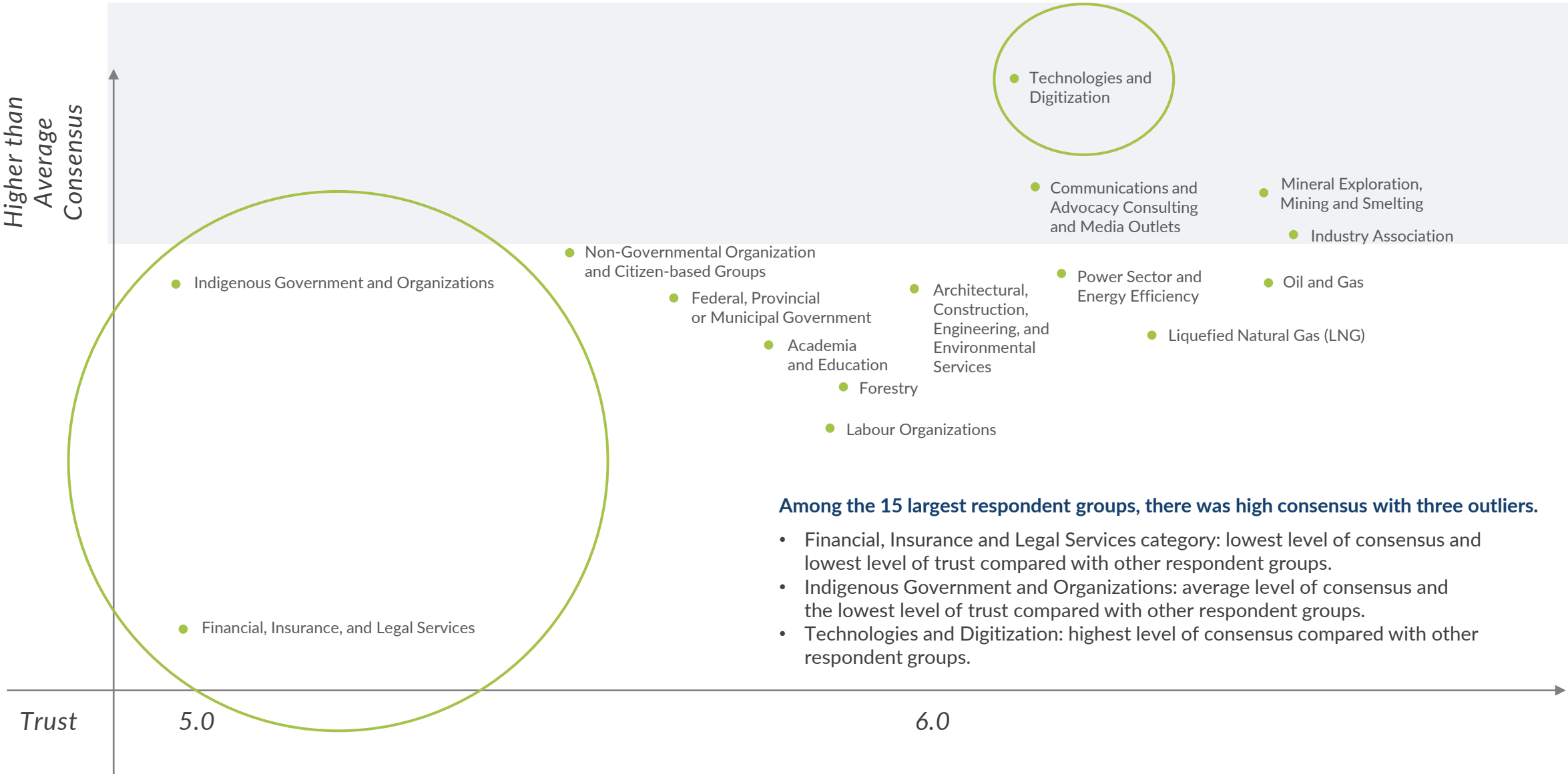
- Although Indigenous respondents rated questions about trust in economic reconciliation slightly positively, their responses were between 16-27% lower than the collective results reflecting an average of 21% lower within the dimension.
- On questions about the integration of Indigenous cultural values and traditional knowledge into the natural resource sector, respondents on average indicated moderate levels of trust whereas Indigenous respondents indicated low levels of trust.



## Areas of high and low consensus

- Private industry overall had higher trust index scores than non-private.
- Indigenous Reconciliation Dimension.
  - Positive perception of equitable economic opportunities, procurement strategies, training and advancement.
  - Low trust rating from Indigenous respondents on integration of Indigenous cultural values and traditional knowledge, compared with positive overall average.

# Consensus in Trust Level Ranking



**Among the 15 largest respondent groups, there was high consensus with three outliers.**

- Financial, Insurance and Legal Services category: lowest level of consensus and lowest level of trust compared with other respondent groups.
- Indigenous Government and Organizations: average level of consensus and the lowest level of trust compared with other respondent groups.
- Technologies and Digitization: highest level of consensus compared with other respondent groups.

# Summary Scores by Dimension

## LEADERSHIP

**6.4**

Reliable & Transparent  
Communications

## SHARED VALUES

**6.1**

Inclusive Growth,  
Community Empowerment  
& Workforce Development

## INDIGENOUS RECONCILIATION

**6.4**

Equity, Cultural &  
Traditional Knowledge  
& Advancement

## GOVERNMENT COLLABORATION

**5.3**

Engagement for Effective  
Policy Design &  
Implementation

## CLIMATE AND RESILIENCY

**5.3**

Adaptation &  
Technological Readiness

# Results by Dimension

## SECTION THREE

## Leadership Dimension Index Score

# 6.4

Reliable & Transparent  
Communications

- Leadership score boosted by positive perceptions of reliable and transparent communications.



### Insight

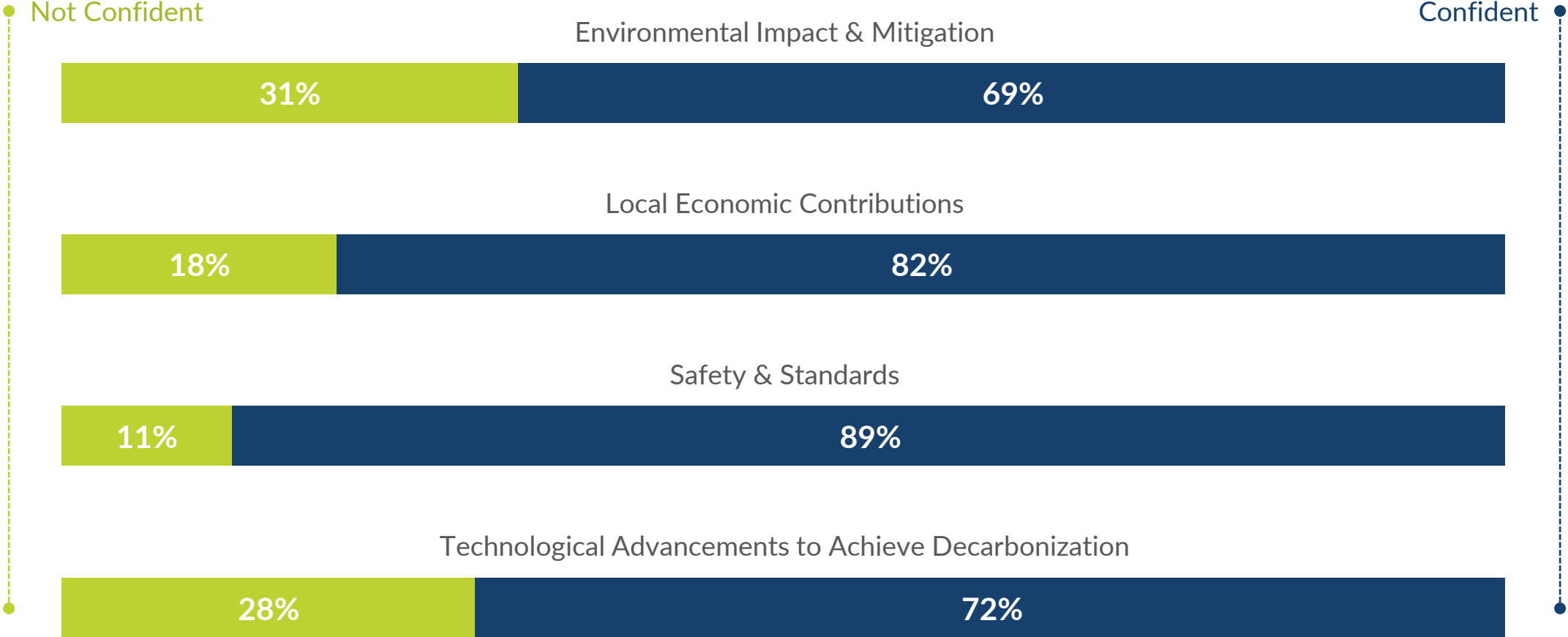
**High results for reliability of information, particularly pertaining to:**

- Safety & Standards: > 88%
- Local Economic Contributions: > 81%

**Lowest rating in this Dimension:**

- Timeliness of information shared by the natural resource sector on its impact and activities (65%)

# Confidence in Data Reliability

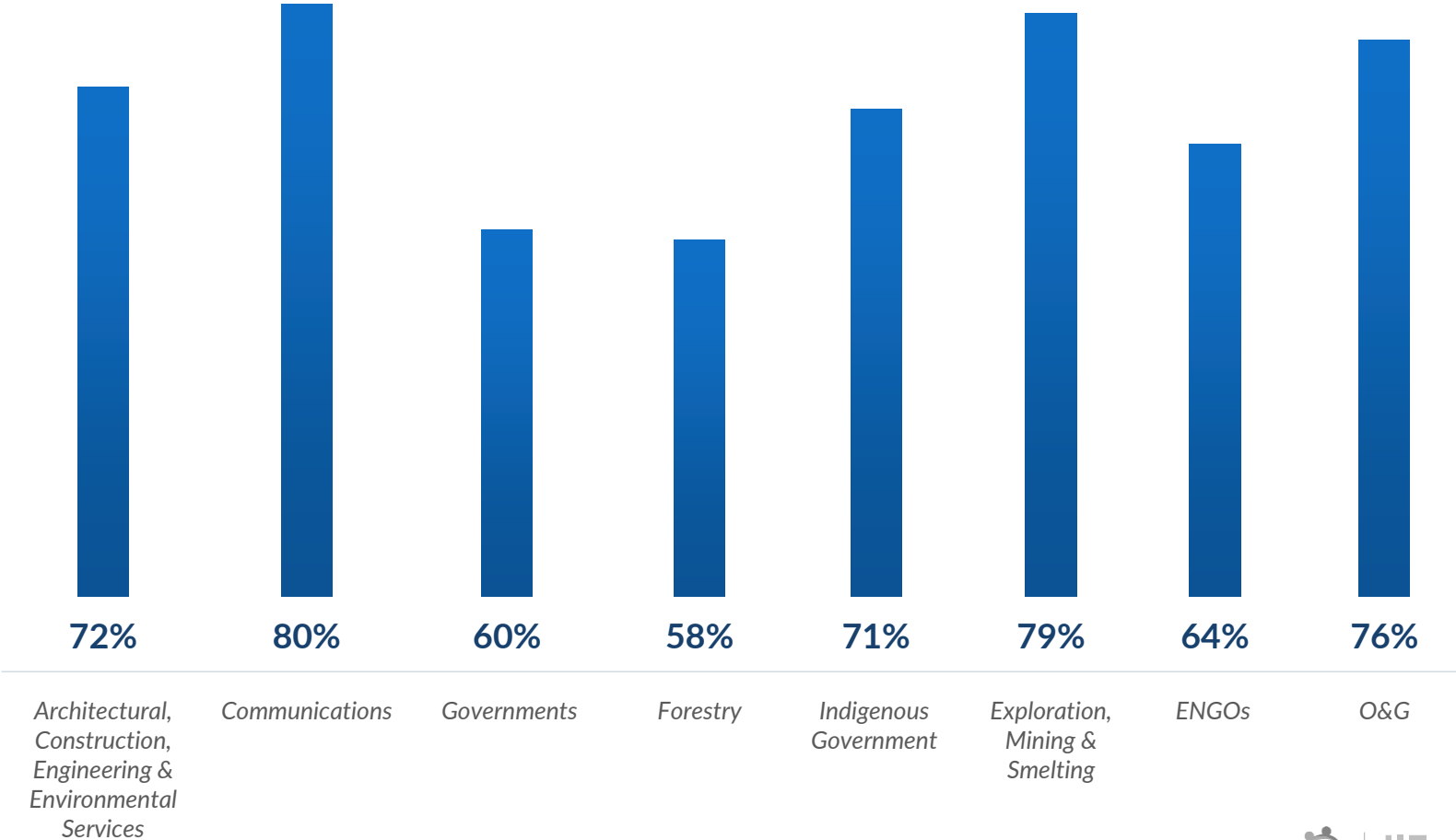




# Overall Positive, Though Varying, Expectations of Tangible Solutions

**69%**

Believe that the natural resource sector in BC will deliver tangible solutions over the next five years



## Shared Values Dimension Index Score

# 6.1

### Inclusive Growth, Community Empowerment & Workforce Development

- Shared Values scored highly on questions about inclusive growth, community empowerment and workforce development.
- Questions about training, particularly for underrepresented groups, returned the highest ratings.



#### Insight

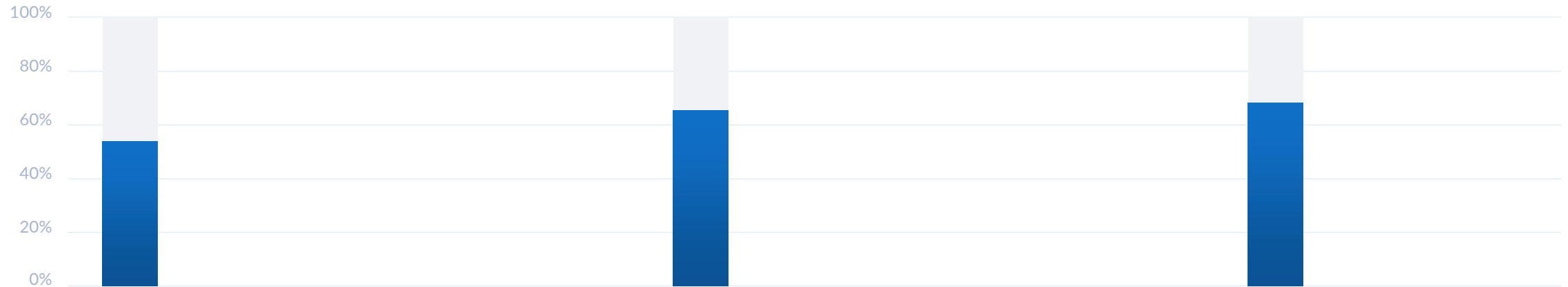
##### Highest rated question:

- Natural resource sector's efforts to provide and facilitate training for underrepresented groups to increase their representation in the sector (above 70%)

##### Lowest rated question:

- Level of involvement that local communities have in the decision-making processes of the natural resource sector (above 50%)

# Shared Values between Natural Resource Sector and the Communities it Serves



**57%** 349 Respondents

Believe that **local communities are involved and influential in the decision-making process** within the natural resource sector in BC

**64%** 347 Respondents

Believe that the natural resource sector in BC makes **adequate social investments in response to economic growth.**

**67%** 329 Respondents

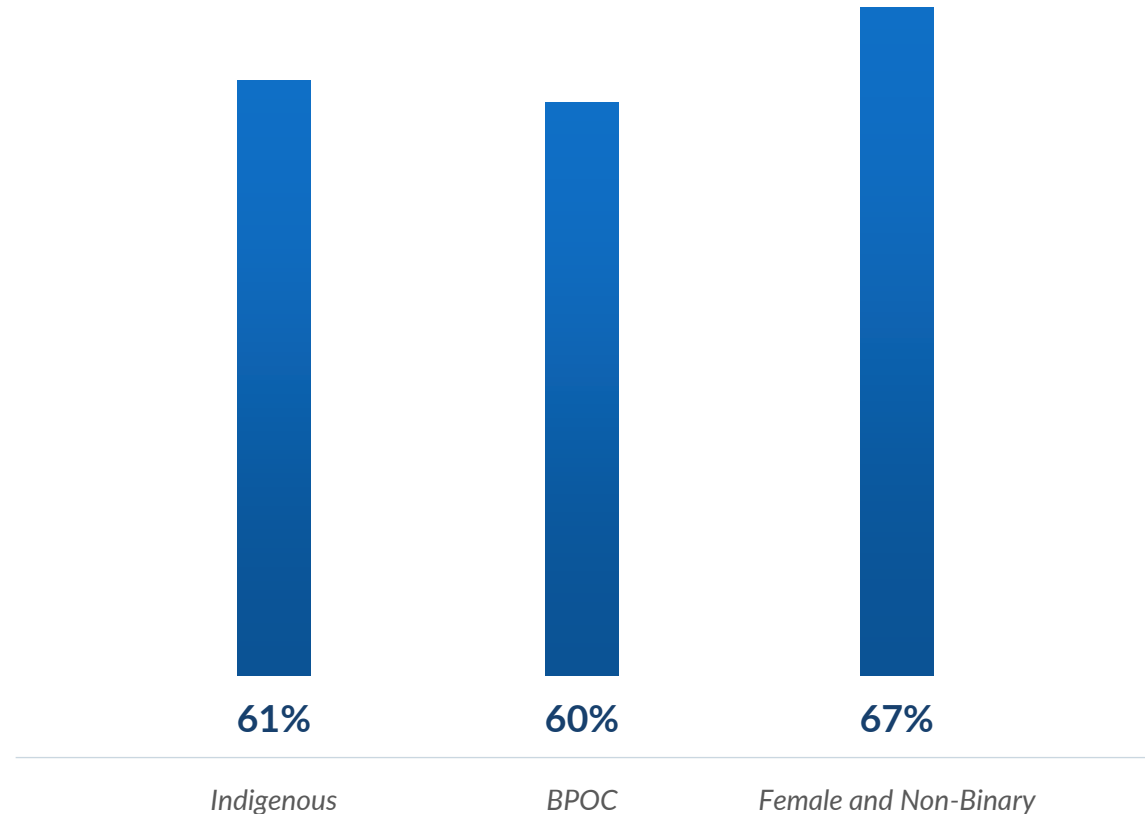
Believe that the natural resource sector provides **adequate training initiatives to develop skills for anticipated sectoral changes.**

# Sectoral Effort of Training Initiatives to Increase Representation

Ratings from underrepresented groups was lower than the average

**73%**

Believe that the natural resource sector in BC is **effortful in providing training to increase representation of underrepresented groups.**



# Indigenous Reconciliation Dimension Index Score

# 6.4

## Equitable Economic Opportunities, Cultural & Traditional Knowledge Integration & Advancement

- Score was boosted by perceptions of progress on equitable economic opportunities, procurement strategies, training and advancement for Indigenous peoples.
- Respondents rated lower in the consistency of Indigenous Reconciliation and cultural training and integration of traditional knowledge and cultural values into planning processes.
- Although Indigenous respondents rated questions about economic reconciliation slightly positively, their responses were between 16-27% lower than the collective results reflecting an average of 21% lower within the dimension.



### Insight

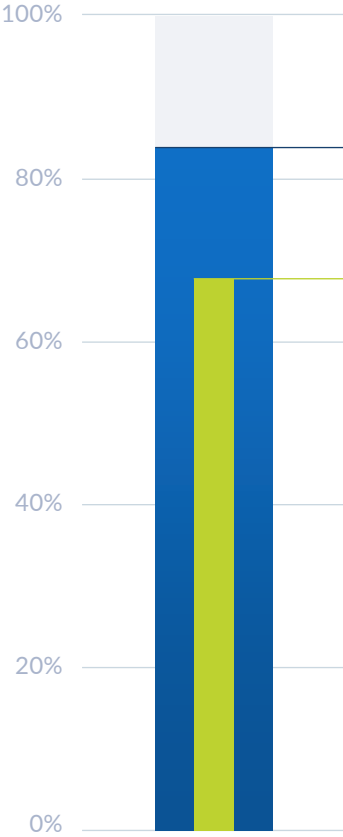
#### Highest rated question:

- Collaborative efforts between the natural resource sector and Indigenous communities in pursuing equitable economic opportunities and partnerships (above 80%)

#### Lowest rated question:

- Consistency with which the natural resource sector provides Indigenous Reconciliation and cultural training to employees across projects (above 60%)

# Equitable Economic Opportunities and Partnerships



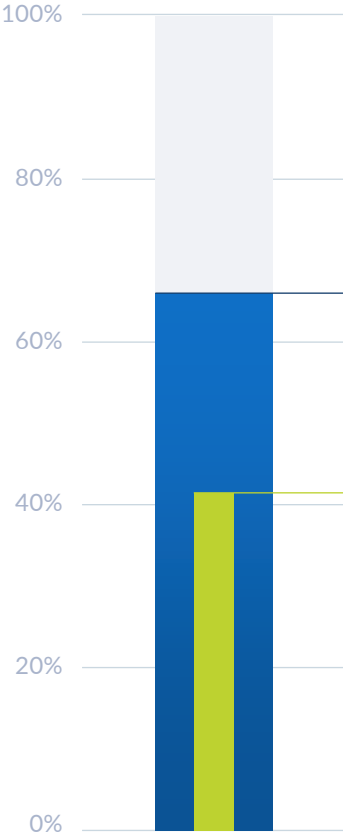
**84%** 350 Respondents

Believe that the natural resource sector and Indigenous communities in BC **engage in collaborative efforts to pursue equitable economic opportunities and partnerships.**

**67%** 49 Indigenous Respondents

Believe that the natural resource sector and Indigenous communities in BC **engage in collaborative efforts to pursue equitable economic opportunities and partnerships.**

# Integrating Traditional Knowledge and Cultural Values



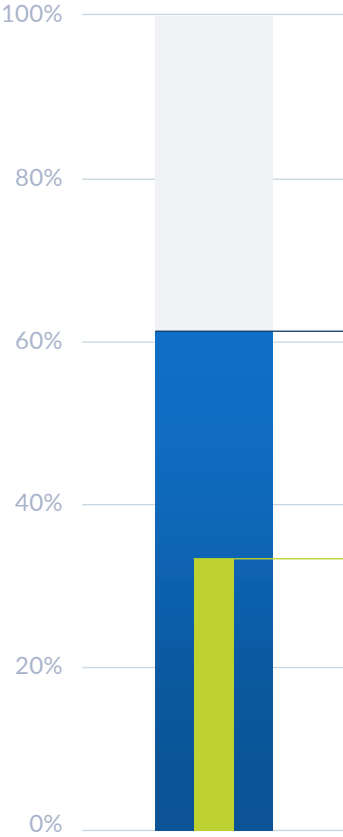
**66%** 340 Respondents

Believe that the natural resource sector in BC effectively engages with Indigenous communities to integrate traditional knowledge and cultural values into planning processes.

**41%** 49 Indigenous Respondents

Believe that the natural resource sector in BC effectively engages with Indigenous communities to integrate traditional knowledge and cultural values into planning processes.

# Indigenous Reconciliation and Cultural Training in the Sector



**61%** 335 Respondents

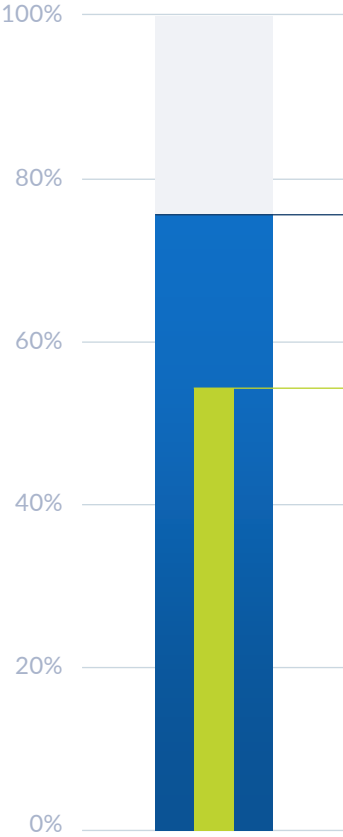
Believe that projects within the natural resource sector in BC **consistently provide Indigenous Reconciliation and cultural training to employees.**

**34%** 47 Indigenous Respondents

Believe that projects within the natural resource sector in BC **consistently provide Indigenous Reconciliation and cultural training to employees.**



# Effectiveness in Implementing Indigenous Procurement Strategies



**77%** 329 Respondents

Believe that the natural resource sector in BC effectively implements Indigenous procurement strategies.

**55%** 51 Indigenous Respondents

Believe that the natural resource sector in BC effectively implements Indigenous procurement strategies.

# Efforts for Indigenous Employment

## Average Response



## Indigenous Response



## Government Collaboration Dimension Index Score

# 5.3

### Engagement for Effective Policy Design & Implementation

- The trust attributes of cohesive commitment, responsiveness, and transparency were the most heavily weighted in this dimension.
- Lower ratings for the perceived effectiveness of governments to solicit and incorporate input present an opportunity for further engagement and dialogue.



#### Insight

##### Highest rated question:

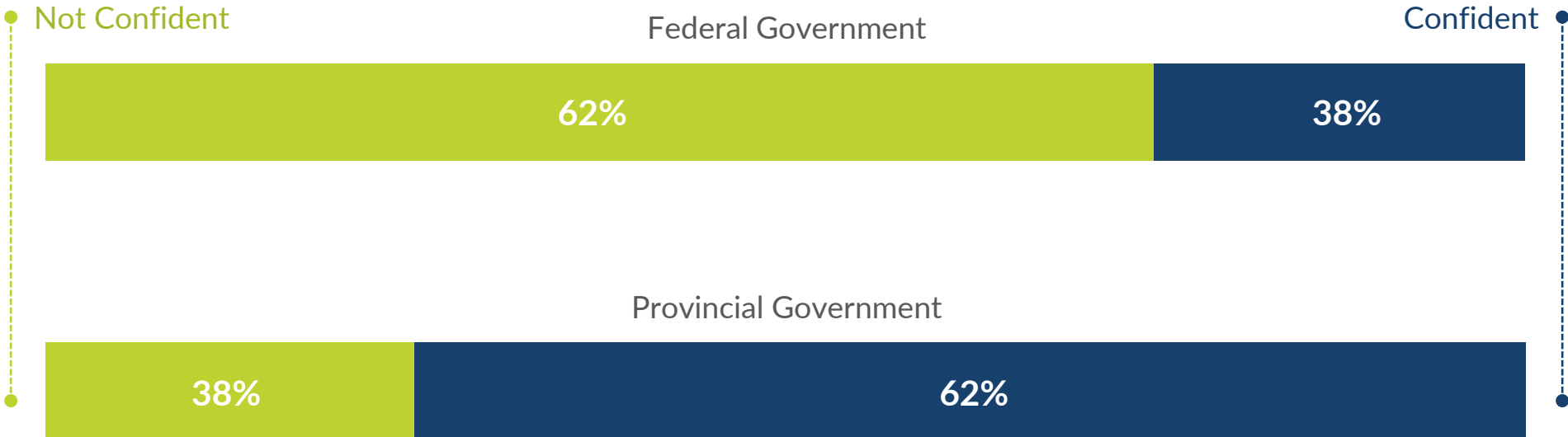
- Industry and the associated supply chain effectiveness in communicating with Government (above 70%)

##### Lowest rated questions:

- The effectiveness of Federal Government & Provincial Government's efforts in soliciting and incorporating input from communities and interested stakeholders (below 60%)

# Effectiveness of Government Engagement

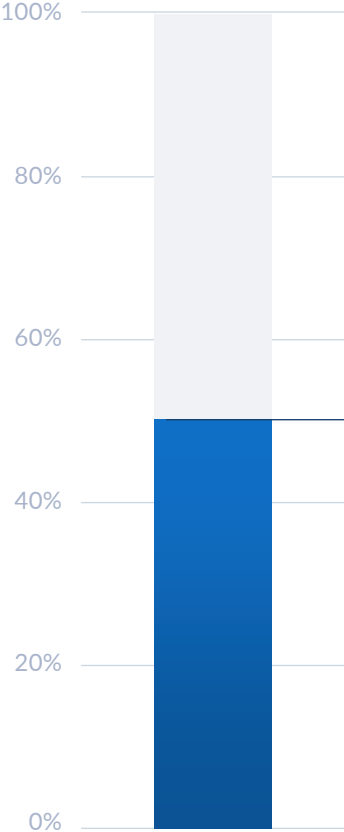
- in reaching mutually beneficial outcomes with Indigenous Nations and respecting Indigenous Rights



# Perceptions of Government Input



# Degree of Consensus on Competitive and Sustainable Policy Development



**<50%**

of respondents believe that the natural resource sector in BC is aligned in developing policies that consider both competitiveness and climate change initiatives.

## Climate and Resiliency Dimension Index Score

# 5.3

### Adaptation & Technological Readiness

- Results for questions in this Dimension reveal the degree of change and uncertainty related to the impacts of climate change and technological advancements like Artificial Intelligence.



#### Insight

Pertaining to the natural resource sector's ability to manage potential disruption caused by technological developments:

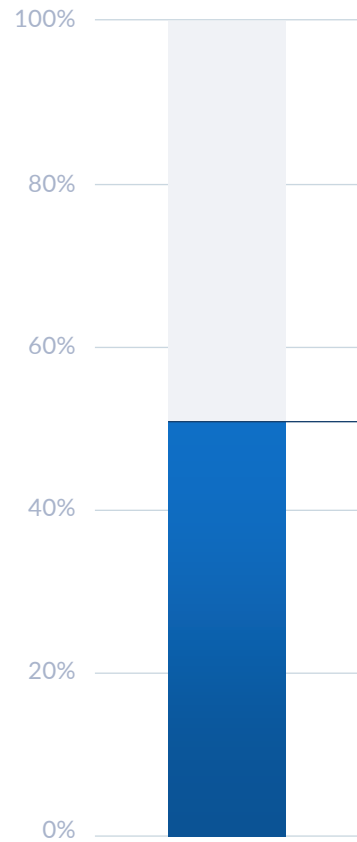
#### Highest rated question:

- Level of trust in fostering new job creation and roles (above 60%)

#### Lowest rated question:

- Level of trust in mitigating economic displacement in communities through diversification (below 50%)

# Supporting Local Communities in Building Resiliency

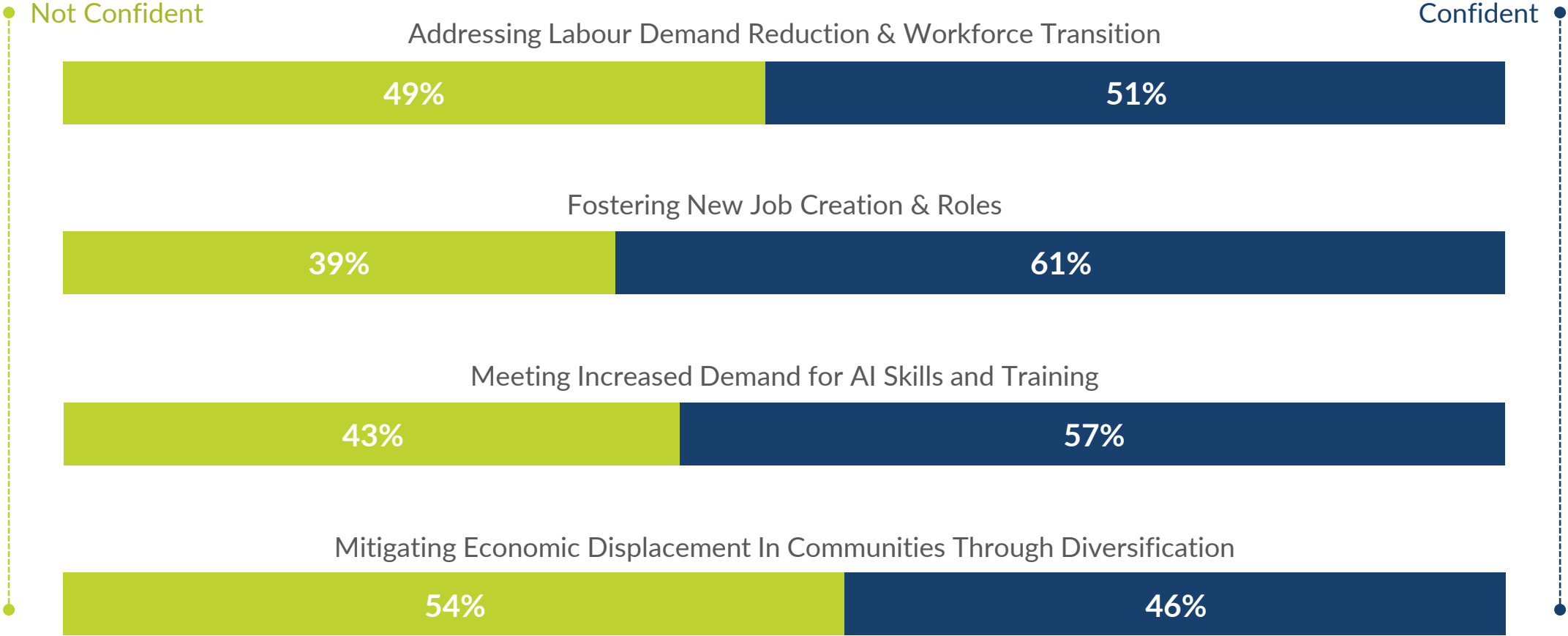


**50%**

Believe that the natural resource sector in BC is **effectively supporting local communities to build resilience to adapt to changing climate conditions.**



# Managing Technological Development, Like AI



# About Us

## SECTION FOUR



# BC Natural Resources Forum

- The BC Natural Resources Forum (BCNRF) has grown over the past 21 years to become Western Canada's largest multi-sector resource conference bringing First Nations, Government, and the Natural Resources Sector together to discuss opportunities, innovative solutions and success stories.
- The BC Natural Resources Forum offers a positive, non-partisan arena to discuss and learn first-hand the latest news, trends and opportunities within the resource sector in BC and across Canada.
- The Forum annually hosts a large contingent of federal, provincial, and local government leaders, as well as continuing strong interest, support and attendance by Indigenous leaders, representatives from resource developers and service and supply sectors that are the foundation of our resource economy.



# iTOTEM Analytics

- iTOTEM Analytics is an Indigenous-affiliated purpose-driven data science and communications firm with locations in British Columbia, New Brunswick and Texas. Since 2014, we've been helping businesses and not-for-profits simplify complex data to tell their story and improve operations.
- We specialize in mapping, visualizing and reporting climate, economic, social and innovation benefits by neighborhood or province. Using data science, machine learning, and AI, we categorize and visualize the positive impact of investments on Indigenous and local communities.
- Our team of data scientists, engineers, mathematicians, software developers, communications and policy specialists do the hard work for clients so they can focus on the priorities to move projects forward. We see the people behind the numbers and transform data into trust.

[www.itotem.io](http://www.itotem.io)



Thank you