



Town of Fort Macleod Council Meeting Agenda

Monday, September 11, 2023, 7:00 pm

Council Chambers

G.R. Davis Administration Building

410 20th Street

Fort Macleod, AB T0L 0Z0

Mayor Brent Feyter, Deputy Mayor Marco Van Huigenbos

	Pages
A. CALL TO ORDER	
B. MOMENT OF REFLECTION	
C. APPROVAL OF AGENDAS	
C.1 CONSENT AGENDA	
C.1.a COUNCIL MEETING MINUTES	
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D. FOR THE GOOD OF COUNCIL	
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G. CONSIDERATION OF DELEGATIONS and PUBLIC HEARINGS	
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J. ADMINISTRATIVE REPORTS	

(Quarterly - January, April, July, October)

K. IN CAMERA

K.1 LAND SALE

L. ADJOURNMENT



**Town of Fort Macleod
Council Meeting Minutes**

**Monday, August 28, 2023, 7:00 pm
Council Chambers
G.R. Davis Administration Building
410 20th Street
Fort Macleod, AB T0L 0Z0**

Council Present: Mayor Brent Feyter, Councillor Aaron Poytress, Councillor Christina Fox, Councillor Mackenzie Hengerer, Councillor Jim Monteith, Councillor Marco Van Huigenbos, Councillor Gord Wolstenholme

Administration: Anthony Burdett, CAO, Adrian Pedro, Director of Operations, Liisa Gillingham, Director of Community & Protective Services, Kris Holbeck, Director of Finance, Meranda Day Chief, Executive Assistant

Others: Sgt. Christian Lafleur - Fort Macleod RCMP

A. CALL TO ORDER

Mayor Feyter called the meeting to order at 7:04 pm.

B. IN CAMERA

C. MOMENT OF REFLECTION

D. APPROVAL OF AGENDAS

D.1 CONSENT AGENDA

R.181.2023

Moved by: Councillor Hengerer

That Council approves the consent agenda as presented.

CARRIED

D.1.a COUNCIL MEETING MINUTES

D.1.a.a Council Meeting Minutes June 26, 2023

D.1.a.b Committee of the Whole Meeting Minutes - August 2, 2023

D.1.b CORRESPONDENCE AND INFORMATION ITEMS

D.1.b.a Thank You: FP Walshe Leadership Award Recipient Mathias

- D.1.b.b Thank You: Granum Canada Day Society
- D.1.b.c Thank You: Oldman Watershed Council
- D.1.c FINANCIALS
 - D.1.c.a Cheque Listing August 28, 2023
 - D.1.d COMMITTEE REPORTS
 - D.1.d.a Chinook Arch Regional Library Financial Reports

D.2 REGULAR MEETING AGENDA

R.182.2023

Moved by: Councillor Van Huigenbos

That Council approves the meeting agenda with additions.

Additions

J8.150th Community Celebration

L. IN CAMERA 1. Legal

CARRIED

E. FOR THE GOOD OF COUNCIL

Town of Fort Macleod - United Against Hate

Mayor Feyter read the public statement "Town of Fort Macleod - United Against Hate" dated August 28, 2023 to those in attendance in person and over live stream.

Mayor Feyter called a brief recess at 7:31 pm. The meeting resumed at 7:34 pm.

F. DELEGATIONS

F.1 Fort Macleod RCMP Quarterly Report

Mayor Feyter thanked Sgt. Christian Lefleur from the Fort Macleod RCMP Detachment for his delegation to Council.

G. PUBLIC HEARINGS

H. CONSIDERATION OF DELEGATIONS and PUBLIC HEARINGS

I. UNFINISHED BUSINESS

J. NEW BUSINESS

Anthony Burdett, CAO joined the meeting at 8:23 pm.

J.1 Provincial Historic Area Guidelines

R.183.2023

Moved by: Councillor Monteith

That Council approves funding for the Provincial Historic Area Design Guidelines update project, with an anticipated budget of \$15,000.00.

CARRIED

J.2 Subdivision Referral MDWC 2023-0-109

R.184.2023

Moved by: Councillor Poytress

That Council accepts the Subdivision referral from the Municipal District of Willow Creek # MDWC 2023-0-109 as information.

CARRIED

J.3 Proclamation Development Officer's Week

R.185.2023

Moved by: Councillor Wolstenholme

That Council proclaims September 19, 2023, to September 22, 2023, to be designated Alberta Development Officers week in the Town of Fort Macleod to recognize Development Officers and their commitment to public service.

CARRIED

J.4 ADM 40: Exempt to Taxable Sales Policy

R.186.2023

Moved by: Councillor Fox

That Council accepts the presented ADM 40: Exempt to Taxable Sales Policy as information.

CARRIED

J.5 Request for Proposal: Affordable Housing Initiative

R.187.2023

Moved by: Councillor Monteith

That Council approves the Fort Macleod Affordable Housing Initiative Request for Proposal as amended.

Amendments

- Evaluation and selection process: Add in a requirement for community capability and sustainability.
- Proposal requirements: Add in a community engagement outline.

CARRIED

J.6 FCSS Provincial Funding Update

Anthony Burdett, CAO left the meeting at 8:19 pm.

R.188.2023

Moved by: Councillor Hengerer

That Council approves a 4% increase to Family and Community Support Services (FCSS) funding for the 2023 budget year to match the increase from the province.

CARRIED

J.7 MD of Willow Creek: Library Board Appointment

CAO Anthony Burdett returned to the meeting at 8:20 pm.

R.189.2023

Moved by: Councillor Fox

That Council accepts the Municipal District of Willow Creek No.26 appointed representative Reeve Maryanne V. Sandberg to serve on the Town of Fort Macleod Library Board for a 3-year term (October 2022 to October 2025).

CARRIED

J.8 150th Celebration Committee

R.190.2023

Moved by: Councillor Van Huigenbos

That Council directs Administration to add a line for consideration in the 2024 provisional budget for the 150th Community Celebration in the amount between \$50,000.00 and \$150,000.00 with fundraising options, admission and other details to be determined at a later date.

CARRIED

K. ADMINISTRATIVE REPORTS

R.191.2023

Moved by: Councillor Fox

That Council accepts the presented Administrative Reports as information.

CARRIED

K.1 CAO Quarterly Report

K.1.a Council Motion List

K.1.b Strategic Action Plan

K.2 Community & Protective Services Quarterly Report

K.3 Finance Quarterly Report

K.4 Operations Quarterly Report

L. IN CAMERA

R.192.2023

Moved by: Councillor Van Huigenbos

That Council moves in camera to discuss a legal item at 8:53 pm.

CARRIED

R.193.2023

Moved by: Councillor Hengerer

That Council moves out of in camera at 9:40 pm.

CARRIED

L.1 Legal

M. ADJOURNMENT

Mayor Feyter adjourned the meeting at 9:41 pm.

Mayor Brent Feyter

CAO Anthony Burdett



CHEQUE LISTING

RECOMMENDATION:

That Council accepts the cheque listing as of September 6, 2023.

DETAILS:

PURPOSE:

ANALYSIS & OPTIONS:

FINANCIAL IMPLICATIONS:

COUNCIL STRATEGIC PLAN:

APPLICABLE LEGISLATION:

ATTACHMENTS:

Cheque listing as of September 6, 2023

PREPARED BY: Kris Holbeck, Director of Finance

REVIEWED BY: None

APPROVED BY: Anthony Burdett, CAO



TOWN OF FORT MACLEOD

Cheque Listing For Account Payable

Cheque #	Cheque Date	CEO	CAO	Vendor #	Vendor Name	Batch #	Amount	
20231673	2023-08-24			900100	LOBLAW REAL ESTATE	15288	4,632.84	
20231674	2023-08-24			900100	UNITED FARMERS OF ALBERTA		2,492.34	
							<hr/>	7,125.18
							Batch #	15289
20231675	2023-08-24			900200	BALL, DIANE ELIZABETH		7,670.00	
20231676	2023-08-24			900200	BUHLER, SANDRA		139.63	
							<hr/>	7,809.63
							Batch #	15290
20231677	2023-08-24			169	CANADIAN UNION OF PUBLIC EMPLOYEES 70		1,024.38	
20231678	2023-08-24			129	CHINOOK SEPTIC & EXCAVATING		358.05	
20231679	2023-08-24			1803	DETAC CORPORATION		3,150.00	
20231680	2023-08-24			225	EXTENDICARE		713.00	
20231681	2023-08-24			352	LARSON'S TIRE SHOP		31.50	
20231682	2023-08-24			1802	M&E VH HOLDINGS LTD.		1,155.00	
20231683	2023-08-24			1	CABLE CONSULTING		10,808.70	
							<hr/>	17,240.63



TOWN OF FORT MACLEOD

Cheque Listing For Account Payable

2023-Sep-6
10:04:01AM

Cheque #	Cheque Date	CEO	CAO	Vendor #	Vendor Name	Amount	Batch #
							15291
20231684	2023-08-25			1772	2442851 ALBERTA LTD.	198.73	
20231685	2023-08-25			17	ALBERTA HARDWARE LTD.	802.11	
20231686	2023-08-25			1769	AMAZON.COM.CA	506.22	
20231687	2023-08-25			55	AMSC INSURANCE SERVICES LIMITED	24,119.36	
20231688	2023-08-25			58	AQUAM INC.	711.71	
20231689	2023-08-25			644	AVAIL LLP	488.25	
20231690	2023-08-25			1775	BIG SKY CALL CENTERS INC.	338.42	
20231691	2023-08-25			1205	BRIDGE AIR SYSTEMS LTD.	798.00	
20231692	2023-08-25			101	BROWNLEE LLP (EDMONTON)	2,667.06	
20231693	2023-08-25			112	CANADIAN LINEN & UNIFORM SERVC	95.36	
20231694	2023-08-25			1788	CB PROCESS ULC	1,619.10	
20231695	2023-08-25			143	CLEARTECH INDUSTRIES INC.	968.63	
20231696	2023-08-25			1034	CRAZY STITCH	331.80	
20231697	2023-08-25			615	CULLIGAN WATER	43.78	
20231698	2023-08-25			662	D W DIRT WORKS LTD.	9,975.00	
20231699	2023-08-25			174	DB PERKS & ASSOCIATES LTD.	420.00	
20231700	2023-08-25			1687	DYNAMIC MARINE SERVICES INC.	189.00	
20231701	2023-08-25			1675	ECOAG INITIATIVES INC.	1,921.92	
20231702	2023-08-25			201	ECONOMY CASHWAY LUMBER	1,861.52	
20231703	2023-08-25			1498	FIRST EDITION FIRST AID TRAINING INC.	256.99	
20231704	2023-08-25			885	FIX AUTO FORT MACLEOD	8,501.27	
20231705	2023-08-25			1657	FLOWPOINT ENVIRONMENTAL SYSTEMS LP	106.03	
20231706	2023-08-25			262	FORT PHARMACY 2020 LTD.	32.42	
20231707	2023-08-25			1489	FORTIS ALBERTA INC.	5,859.75	
20231708	2023-08-25			1746	HATFIELD, CHRISTOPHER	113.00	
20231709	2023-08-25			1173	HIFAB HOLDINGS LTD.	379.89	
20231710	2023-08-25			1387	HOLWERDA, THIJS	113.00	
20231711	2023-08-25			346	KOST FIRE EQUIPMENT LTD.	4,632.60	
20231712	2023-08-25			374	MACLEOD GAZETTE LTD.	399.26	
20231713	2023-08-25			1088	METERCOR INC.	871.50	
20231714	2023-08-25			414	MPE ENGINEERING LTD.	42,826.66	
20231715	2023-08-25			393	MUNICIPAL DISTRICT OF WILLOW CREEK	259.88	
20231716	2023-08-25			419	NAPA AUTO PARTS	387.97	
20231717	2023-08-25			978	NEXT HOME AND GARDEN	254.59	
20231718	2023-08-25			436	OLDMAN RIVER REGIONAL SERVICES	900.00	
20231719	2023-08-25			1250	PATTISON OUTDOOR ADVERTISING LP	787.50	
20231720	2023-08-25			1711	PINCHER CREEK CO-OPERATIVE ASSOC. LTD.	5,766.40	
20231721	2023-08-25			453	PITNEY BOWES LEASING	605.62	
20231722	2023-08-25			1780	RECORDXPRESS	49.39	
20231723	2023-08-25			486	ROCKY MOUNTAIN PHOENIX	2,752.05	
20231724	2023-08-25			492	RP WATERWORKS INC.	601.86	
20231725	2023-08-25			654	SECURTEK	75.44	
20231726	2023-08-25			514	SILVER AUTOMOTIVE FORT MACLEOD LTD.	716.77	
20231727	2023-08-25			1737	SKYFIRE ENERGY INC	94,856.91	
20231728	2023-08-25			1024	SOUTHERN IRRIGATION	684.31	
20231729	2023-08-25			1654	T & T DISPOSAL SERVICES	2,405.79	
20231730	2023-08-25			1398	T.L.C. VENTURES INC.	7,231.36	
20231731	2023-08-25			1433	TORRY LEWIS ABELLS LLP	4,299.75	
20231732	2023-08-25			578	TOWN OF FORT MACLEOD	19,443.27	



TOWN OF FORT MACLEOD

Cheque Listing For Account Payable

2023-Sep-6
10:04:01AM

Cheque #	Cheque Date	CEO	CAO	Vendor #	Vendor Name	Amount
20231733	2023-08-25			1086	TRINUS TECHNOLOGIES INC.	52.50
20231734	2023-08-25			583	UFA CO-OPERATIVE LIMITED	118.09
20231735	2023-08-25			85	WASTE CONNECTIONS OF CANADA INC.	16.80
20231736	2023-08-25			626	WESTCO CONSTRUCTION LTD.	105.00
20231737	2023-08-25			619	WILLOW CREEK REGIONAL WASTE	8,479.10
20231738	2023-08-25			1427	WINDY WEST PLUMBING LTD.	178.50
20231739	2023-08-25			1749	WOLSELEY CANADA INC.	1,319.96
						264,497.15
						Batch # 15307
20231754	2023-08-30			19	ALBERTA LAND TITLES	70.00
20231755	2023-08-30			1799	BELL MOBILITY	1,099.00
20231756	2023-08-30			1156	DIRECT ENERGY BUSINESS	54,968.03
20231757	2023-08-30			1745	GFL ENVIRONMENTAL INC.	33,438.15
20231758	2023-08-30			454	PITNEY WORKS	2,121.00
20231759	2023-08-30			564	TELUS MOBILITY	240.00
						91,936.18
Total						388,608.77

*** End of Report ***



Highway 3 Twinning Development Association

Board Meeting Agenda

Friday September 8, 2023, 10:00 AM to Noon

VIRTUAL MEETING – Microsoft TEAMS (Click link below to join, or from your Calendar invite)

[Click here to join the meeting](#)

1. Call to order/Attendance/Quorum
2. Approval/Additions to the Agenda
3. Approval of Minutes
 - June 8 Special General Board Meeting – for Approval
4. Feature Speaker: Melody Garner “Present & Future of the AG Industry; Growing Food the Alberta way”
Gain insight into where the Agriculture Industry is now and what the future could hold for Alberta producers and processors in the years to come.
5. Reports
 - 5.1. Darren Davidson; Southern Alberta Dept. of Transportation
 - 5.2. MLA/Ministry/GOA Report/s
 - 5.3. MP/Fed GOC Report/s
 - 5.4. Presidents Report
 - 5.5. Director of Advancement Report
 - 5.6. Finance Report
 - 2023 Budget to Actual Report
6. Business Arising
 - ABmunis attendance & Director of Advancement Cost share approved
7. New Business
 - 7.1 New Members since February Board meeting
 - Castle Mountain Resort (Exec Approved in May)
 - 7.2 CPKC Centreport Rail Park Brochure & some Presentation slides – for information
8. Other Reports from Board Members and Attendees (Round-table)
9. Next Board Meeting: **VIRTUAL, Thursday November 2nd 2023, 10:00 am to Noon**
10. Adjournment

Bill Chapman
Victoria Chester
Jack Brewin



HIGHWAY 3 TWINNING DEVELOPMENT ASSOCIATION

Special General Meeting Minutes

June 8, 2023, 10:00AM to Noon In-Person Only

Sandman Signature – Cedar Room; 320 Scenic Dr. Lethbridge

In Attendance:

Bill Chapman	Town of Coaldale	Gordon Reynolds	Town of Bow Island
Jack Brewin	Town of Taber	Brian Hildebrand	MD of Taber
Darren Hirsch	City of Medicine Hat	Dean Parkinson	Castle Mountain
Bev Thornton	Alberta SouthWest	John MacGarva	MD of Pincher Creek
Don Drake	County of Forty Mile	Peter Casurella	SouthGrow Regional In.
Eric Crane	Tourism Lethbridge	Deb Florence	Town of Coalhurst
John Turcato	Taber Chamber	David Klassen	Sunrise Panel Manufacturing
Mike Robinson	Med. Hat Chamber President	Don Anderberg	Town of Pincher Creek
		Morris Zeinstra	Lethbridge County (10:21 am)

Board Member Regrets: Brent Feyter-Town of Fort Macleod, Shane Hok – Cypress County, Blair Painter – Crowsnest Pass, Marie Logan – Horizon School District, Mark Campbell – City of Lethbridge, Rebecca Tokariuk – Lantic/Rogers Sugar, and Scott Wojtowicz – LambWeston

Chair

Bill Chapman

H3TDA President

Recorder

Victoria Chester

H3TDA Director of Advancement

1. Call to order

Meeting started at 10:06 am without Quorum. Meeting officially called to order with Quorum at 11:18am.

2. Approval of the Special Agenda “Vision/Priorities for the Association”

Motion: Brian Hildebrand to Approve the Agenda

CARRIED

3. Approval of the Board Meeting Minutes: “Appropriation” is used in the minutes, but the appropriate word would be “Expropriation”.

Motion: Darren Hirsch

To Approve the Minutes of the February 17, 2023 meeting of the H3TDA Board, as amended.

CARRIED

4. Introduction of Facilitator: Kim Welby, Economic Development Officer, SouthGrow Regional Initiative

• Backgrounder:

Refresh on Mission, Vision, and current Work Plan.

- Mission: “Support the completion of twinning Hwy 3 from the BC border to Medicine Hat as an integral part of the evolving multi-modal provincial transportation system.”
- Vision: “A twinned Hwy 3 is a safe, community and regionally economic corridor of the province and national transportation system.”
- Work Plan 2022-2024 Strategic Priorities are:
 - 1) Studies/Business Case for Twinning (PwC Economic Impact Analysis complete)
 - 1.1 Continued Advocacy
 - 2) Marketing & Communication
 - 3) Funding & Membership Development
 - 4) Operations.

A lot of progress has been made on the work plan, which was reviewed in the Work Plan power point presentation.

- Kim asked how the group was feeling about the direction the association is currently going, knowing that we are half-way through the strategic plan. The following captures key discussion points that followed:

Question: The new government has said that they are going to do the sections that make the most sense to them, which is different from the funding commitments H3DTA got, so how do we support them?

Comments: Strategic Plans are fluid and although we may not have the control over priority for how the Hwy 3 gets twinned, it is still getting done, which fulfills the Associations' Mission. Our role is to continue putting that pressure on, moving from outward advocacy to internal and work in the background to make sure it keeps moving forward.

Question: Regarding the advocacy piece and knowing we potentially have new government partners coming in and now that we are at the half-way point of the plan, what are the key messages or how to we communicate the things we have done and what things we still need to do?

Comments: Our outcomes on the goal level are only what Darrin has gotten into the budget so far which are: a promise for money to twin whatever was promised by the Premier, money for detailed engineering design plans for the two sections in the Pass and between Medicine Hat and Seven Persons, and money for the Piikani Nation Functional Planning Study. We also can use the publicly recorded promise from the current Premier to 'twin in 10 years' as a tool to ensure they keep their promise. We have also built an organization that is financially stable. We are starting to see actual results with construction happening this year. We've gotten the petition to 4000+ signatures. We have stories to go along with those signatures to put in front of our MLA's. It was added that having a Director of Advancement has helped move things forward and she has built a collaborative relationship with Darrin. A review of how far the Association has come, particularly because there was a lot of politicians in the beginning that were supportive but never thought it would happen. The Association started talking to strategic partners and businesses and got them to sign on, which grew the profile of the Association and helped the project gain traction. Having a clear and simple message has been key and the same intentional messaging will be important going forward.

Question: Is it feasible to go directly to the Federal government for funds? How would that play out with the Province?

Comments: Maybe utilize our relationship with the more liberal, British Columbia partners, when doing so. A shared collective is stronger, but municipalities have their own interests so keeping a simple and consistent message across the board is important. We may have a corridor to the Federal government with the Premier being from the Southern region. When we get the soft wins, ie the promises, it is important to keep pushing and staying laser focused on the goals. Change the message from, "please twin highway 3", to asking them "what section of highway 3 are you doing next?" so there is something more actionable to focus on and push. There is a strong impression that Ottawa does not want to work with Alberta. It was suggested that the Association pivot and go along with our partners' interests to secure meetings in Ottawa that discuss issues like Strategic Transportation Corridors. The Federal Government has a key interest in strengthening trade corridors and food security which is not Alberta specific. With our Provincial relationships, it would be natural to keep focused on the mission and vision and keep expanding those relationships to the Federal level. Highway 3 twinning is key infrastructure needed to support Agra-transport. Rely heavily on groups that are willing to work in partnership with the Mission of the Association. Participating in and collaborating with these groups will give us more access. It was cautioned that, although there are many things this group can accomplish, it will be important to stay focused because twining is a long ways out and we have to play the long game. With that being said, the people in the communities will lose sight of it if there is not dirt moving. Communication to the government and communication to the public are different and both need to be focused with consistent pressure.

- List of secondary “IMPACTS” of twinning Hwy 3 that could be added to H3TDA Mission/Mandate: Attendees were asked for input on the following potential advocacy areas that could be added. Some of these impacts come from a recent review BC Hwy 3 Coalition considered. Comments made are noted beside each one below.
 - *Connector roads or Hwys intersecting with Hwy 3:* There are many roads needing expansion, this would be a significant amount of additional work. Hwy 22 was noted as the main connector requiring consideration.
 - *Attend other Association meetings (Economic Development, Tourism, Trucking, Transportation, EV, etc):* Yes, this is something the group feels is important and should be continued by the Director of Advancement and/or the Board as time allows. If Board members are already attending, no need for others to also attend – members can report to the Association at H3TDA Board meetings.
 - *Bike lanes:* This came out of BC. The overall feel was that although connectivity is important, the bike lanes would not be widely supported within the Association. West is Tourism, but it is also manufacturing.
 - *Wildlife crossings/corridor fencing:* Yes. Easy to add to advocacy.
 - *Truck rest stops:* Yes, needs to be a priority when lobbying, as time allows. Expanding Historical Interpretive sights to Rest Stops is a suggestion. Promote private development with GOA land/servicing.
 - *Electric charging:* Our Economic Development partners champion this and ZEVIP expansion underway.
 - *Signage – both interpretive, tourism and safety signs:* Grants not really applicable to H3TDA, partners such as EDL are promoting Canada’s Premier Food Corridor.
 - *Broadband:* There is currently connection all along the food corridor, so this doesn’t need to be on the list.
 - *Wide load trade corridors:* This item was added to the list. Wide load corridors on both the East and West sides are important for manufacturing, export/import. Engineers need to consider the requirements during design. The group felt this is something that aligns with the H3TDA mission.
- Association Vision Considerations: The group was asked to consider the following three options. Director of Advancement briefly went through each option, along with the Associations’ capacity, for consideration. Various members provided feedback prior to the motion being made.
 - A. Go back to how the Association was operated several years ago:
 - Minimal Budget with occasional cash contribution by members
 - Operations handled by Municipalities along the Corridor (or SouthGrow Contract)
 - Advocacy to GOA/MLAs/MPs done by members (Councillors/Mayors)
 - No staff (Director of Advancement)
 - B. Maintain the Association as it currently exists:
 - Annual membership fee
 - Small budget supporting operations & staff lobbyist (Director of Advancement)
 - Follow the Work Plan
 - Address secondary “IMPACTS” only when time allows/secondary focus/Ad Hoc discretion of DofA
 - C. Increase the Mission (Mandate) of the Association:
 - Potentially Increase annual Membership contributions
 - Increase Budget to support increased activities and additional Director of Advancement capacity
 - Expand Mandate and Work Plan to include secondary “IMPACTS” (all or some will drive the amount of budget increase)

Motion: Don Anderberg *H3DTA continue with Option “B” as presented*

CARRIED

SouthGrow was thanked for their assistance in facilitating the meeting.

5. Next Board Meeting: Friday September 8, 2023, 10:00 am to Noon, Virtual only

6. Adjournment: 12:02PM

Motion: Jack Brewin *that the meeting be adjourned*

CARRIED

Director of Advancement Administrator/Operations Report September 2023

- Letters were written to our new and renewing MLAs in congrats on their election. No meeting has occurred yet with our new MLA's, however, MLA Wright (MedHat) attended our April AGM and met with the DofA at the March MedHat Tradeshow and MLA Petrovic contact information has been provided with the intention to schedule an in-person meeting soon.
- In May H3TDA & SouthGrow presented to both the Crowsnest Pass Chamber members and Crowsnest Pass Council
- On a Personal visit to **Ottawa the week of June 19th, the DofA delivered a binder of back-up support for cost-share funding for the twinning of highway 3, along with a letter of invitation for the Minister of Transport**, Omar Alghabra, to meet with Board & Executive members of H3TDA, members of BC Hwy 3 Coalition, and possibly our MP's. Following a private tour on June 21st by MP Motz & MP Shields, the DofA sat in on Question Period, where MP Motz delivered our binder with invite directly to the Minister.
Following the visit, the DofA met with Jordan Stein, Regional Advisor for Pacific, Prairies, North & Atlantic Operations, Ministry of Transport/Transport Canada where the mission and funding request for Hwy 3 was discussed. Jordan advised H3TDA that the Alberta application for National Trade Corridor Funds, submitted in June of 2022, had not been funded. At the same time it has not been declined, in hopes additional NTCF funding would be provided by Treasury, as "all of the NTCF was oversubscribed and many projects are in desperate need of funding". She has advised that should the Minister be visiting Southern Alberta, she will remember that members of H3TDA (and likely also members of the BC Hwy 3 Coalition) would like to meet with the Minister. Jordan was advised that a direction for our Association is to lobby those in the Federal government (ex. Treasury, Infrastructure, Jobs & Economy Ministries, as well as the Premier himself) to provide additional funds, specifically for National supply-chain corridor expansion. In addition, was highlighted some of the many reasons twinning Hwy 3 will benefit the Nation (MP Shields/MP Motz comments RE transport of live animals).
Additionally, the DofA has communicated with Tracy Larkin, Transport Ministry Economist, Coordinator and Policy Advisor for Prairies and Northern Region. Linda Erickson with PrairiesCan referred us to Tracy and the DofA met with Trtacy in-person at the NASCO conference this week.
- **July 17th the Executive met with our MP's** to review strategies for Federal advocacy for the cost-share to twin Hwy 3. All agreed it is a marathon and not a sprint. Provide the story (Executive Summary) with emotion, not charts, such as delivery of essential goods, accidents/loss of life, and need for timing to care for animals being transported. Show how our region benefits the food supply of the Nation and the World (Hwy 3 is the conduit that brings it all to fruition). If the Minister visits, include producers and truckers and maybe leave out the MPs. Challenge the Ontario perception of our region. Squeaky wheel gets the grease. Engage the First Nations to advocate, contact Chief Fox to see if he will provide letter of support. Best to work with the Transport Minister's Chief of Staff, DM or ADM. Connect with Ministers whose files touch on Food security/Food Production, Environment. Check out the "Green Deal". AG is the transition away from Oil & Gas and needs reliable transportation corridors. Deployment is the key to the real benefit. Connect with Tourism MP Randy Balsemo from Edmonton, Peter/Jim Willet can make introduction, or Erin with Lethbridge Tourism.
- July 21st the DofA met with Administration with the Town of Fort Macleod to overview strategy for the town to directly lobby the GOA for Stage 1A and possibly full by-pass completion.
- **August 3rd meeting with Darren Davidson;**
 - All work is moving forward and is justified within the Mandate. Recent media articles are not correct, not delayed.
 - Taber to Burdett: Still moving forward, 2nd submission & Utility Commission meetings. Clearing contract in process to remove basements, septic, cistern, etc. Agreements have been altered to reduce financial risk for Proponents. In September the costs should be finalized and decision on Proponent made.
 - Stage 1A anticipated lobbying coming from Fort Macleod; Darren says the town needs to provide an amount they are willing to cost-share.
 - Piikani Agreement for functional planning study is with the GOA to sign.
 - RFP's are finalized for Medicine Hat (with design phase to include airport runway extension) and Crowsnest Pass (narrowed down to 3 consultants)
 - Sections as Phases:
 - i. Sentinel to Blairmore (has 3 Engineering consultants selected, likely 1st area to start)
 - ii. Blairmore to East of 22 (Frank)
 - iii. East of 22 to Pincher Station
 - iv. Burdett to West of Seven persons
 - v. West of Seven Persons to medicine Hat (Likely 2nd in the queue, only because RFP for design to still go out)

H3TDA shared with Darrent the likely lobbying with Chief Fox, Destination Canada announcement, NTCF info received by Fed Ministry, Crowsnest Presentations, and lobbying with Fed Gov for cost-share of Hwy 3 twinning.
Discussion was had regarding calls/emails received to H3TDA regarding significant delays (up to 1.5 hours) during the paving in Crowsnest Pass. At the H3TDA Executive meeting further discussion was had and a personal statement shared.
- August 29th-31st **the DofA attended the NASCO reunion (Canada, US, Mexico) in Edmonton.** Several great conversations were had, with contacts gathered and shared with our Executive and Economic Development partners. Some new contacts have requested, and been included in, our Board meeting invite and package distribution. Information regarding the CP & KC rail merger and AG/Development slides are shared with the Board, for information. Several of the Alberta presentations were felt to be Calgary/Edmonton centric and more than one presentation map appeared to show the Canamex corridor following Hwy 1 to Hwy 2. As such, the DofA addressed the attendees to advise the Canamex crosses the Coutts border into the 3rd largest Alberta City, Lethbridge, and along Hwy 3 prior to heading North on Hwy 2, in addition to promoting Hwy 3 as a National Trade corridor, Agriculture corridor to the East and Tourism to the West (mentioning several of our large businesses and tourist attractions along Hwy 3). Attendance was worthwhile.
- Payment has been made for a booth at the 2024 Medicine Hat tradeshow, projected to be shared again with Bow Island.
- Maintained normal operations;
 - Completed application for 2024 H3TDA Insurance
 - Completed GST return for the period Jan 1st to June 30th
 - Prepared and provided invoices for Lethbridge, Medicine Hat & new member, Castle Mountain
 - Minutes and bookkeeping/deposits/recording.
 - Prepared MLA letters & arranged printing of Minister of Transport binder contents
- Work Plan update: 16 of 31 YTD Work Plan tasks are completed or partially complete to-date. Some work is no longer applicable. 14 of 21 tasks were complete by the end of Q2.
- Website Petition signers increased from 4203 (Feb Board report) to 4380 signatures now.



Highway 3 Twinning Development Association

June 21, 2023

Attn: Honourable Omar Alghabra, Minister of Transport

RE: Federal Funding to Cost-share Twinning of Interprovincial Highway 3; Alberta and B.C.

On behalf of southern Albertans, the Highway 3 Twinning Development Association (H3TDA) promotes, works proactively and constructively with Provincial and Federal governments for the purpose of twinning Highway 3 from the British Columbia border to Medicine Hat at the earliest possible date. Today we have the opportunity to deliver this package, which includes multiple supporting documents and citizen information, in-person to your Ottawa office.

The Alberta Government made an application in June 2022 for National Trade Corridor Funds (NTCF) to cost-share the twinning of the remaining sections of Alberta Hwy 3. To date we understand funding has not been provided. We have been advised the NTCF NEW CALL states "proposals that only focus on physical infrastructure projects won't be considered under this call".

Alberta Premier Danielle Smith has announced the remaining single-lane sections of Hwy 3 will be twinned over the next 10 years, and project planning for design in some sections of the highway is currently underway. This goal is lofty and relies on funding. Given the Interprovincial nature and value to all of Canada, we urge the Federal Government to provide funding support towards this goal.

Meanwhile, as predicted, the Highway 3 corridor continues to expand in National importance and economic impacts. The majority of the corridor is now "Canada's Premier Food Corridor" (<https://www.canadapremierfoodcorridor.ca>) and just last week Destination Canada Launched a new Tourism Corridor Strategy to Accelerate Intentional Inter Provincial/Territorial Destination Development, with Highway 3 as one of the three pilot corridors (see attached).

The H3TDA Executive extend an invitation to visit Southern Alberta, tour the corridor and meet with members of our Executive and/or Board to discuss how the Federal Government might support this important corridor. Our Association collaborates with our 'sister' group, the "B.C. Highway 3 Coalition" and members of their Board would likely be pleased to join any meeting we can arrange. Additionally, our three Members of Parliament (MP Motz, MP Thomas & MP Shields) support our mandate and would likely attend, should their schedules allow. Should you be in the vicinity of Southern Alberta, we hope you will plan for this proposed meeting.

Thank you for your consideration of this invitation and the large quantity of supporting information.

Victoria Chester

Director of Advancement

Highway 3 Twinning Development Association


403-929-3593

admin@twin3.ca

att. Destination Canada's selection of Hwy 3 Corridor
Dec 2022 PricewaterhouseCoopers Economic Impact Analysis of Twinning Hwy 3
Alberta Economic Corridors Task Force Report 2022
Dec 2021 Letter to Transport Minister Alghabra
Sept 2021 Briefing Note to AB Economic Corridors Task Force
2017 BC/Southern Alberta Border Trucking Survey
2017 Southern Alberta Access to Markets; Commercial Transportation Issues Report
2012 BC Hwy 3 Economic Impact Study
2002 Cost-Benefit Analysis of Twinning Hwy 3
2022 Citizen Impact Statements for Hwy 3

Strategic & Work Plan Completion Tracking

Q1-2023/March	C	Q2-2023/June	C	Q3-2023/Sept	C	Q4-2023/Dec	C
Darren mtg	X	Darren mtg	N/A	Darren mtg	X	Darren mtg	
Media Release	X	Media Release	X	Media Release		Media Release	
Visit Businesses		Visit Businesses		Visit Businesses		Visit Businesses	
New 4 Priorities	X	Town Hall		Host MPs	X	Town Hall	
Meet Minister	Partial	Host MLAs	N/A	ABMunis & RMA		How Fund Twin?	
Review EIA	X	Tradeshows	X	Touchbase Rcp		Incr Industry Pln	
Tradeshows	X	GOA Strategic Msg	X	Intrnl Fund Options		Reciprocal Drive	
EO/Board ToR	X	Piikani visit	N/A	Assoc Mem Prpsl		Host Min & Mem	
EO Succession	X	Feedback to Min	X	EO HR role?		1yr&3yr Budgets	
Recruit Board	X	EO on-board pkg	N/A	Promo Petition?		Invgt Boothshare	
Council Present.	X					Council Present.	
						New Rep 1on1	

 is Incomplete

Highway 3 Twinning Development Association
Budget to Actual Report
2023 Cash Budget to Actual January 1 to September 30 - Q3
Balance Forward = 11,676.64

	(a)	(b)	(c)	(b) (c) = (d)		2022	2021	2020	2019
	2023	Q- Budget	Q- Actuals	Variance	Variance	Actuals	Actuals	Actuals	Actuals
	Budget				Explanation				
Revenue:									
1 Event Income	0.00			-	Note 1			250	
2 Memberships (Adjacent)	53,393.50	33,394	53,393.50	20,000	Note 2	36,485.05	33,551.00	49,559	49,826
3 Memberships (Industry)	6,000.00	3,540	3,790.00	250	Note 3	3,227.50	2,790.00	2,540	
4 GST Refund & Bank Interest	2,815.00	2,815	1,977.82	(837)	Note 4	1,988.06	1,311.43	1,208	
5 Project Matching	3,000.00	2,250	775.00	(1,475)	Note 5	47,749.00	2,772.60	2,291	517
6 Total Revenue Surplus or (Deficit)	65,209	41,999	59,936.32	17,938	Note 6	89,449.61	40,425.03	55,848	50,343
Total Assets/Cash Q1	76,885		71,612.96						
Expenses:									
7 Promotion/Advertising	5,000.00	3,750	1,216.62	2,533	Note 7	3,579.31	4,761.90	2,845	245
8 Website Development	1,000.00	750		750	Note 8		507.73	330	190
9 Office:		-		-	Note 9				
a. Supplies/Postage/PO Box	600.00	450	3.35	447		368.00	286.18		
b. Equipment (repair/replace)	200.00	150		150			59.98		
c. Licenses (Hosting/Email/business/IP address)	750.00	563	791.13	(229)		839.60	359.57	503	
d. Cell Phone contract/Conference Calling	900.00	675	487.28	188		554.40	1,243.86	694	413
10 GST Paid	2,100.00	1,575	1,529.99	45	Note 10	5,529.34	2,145.07	1,637	
11 Insurances (Business/Event)	800.00	-		-	Note 11	712.00	678.00	575	
12 Bank charges and fees	125.00	94		94	Note 12	64.75	65.20		
13 Unpaid Memberships	3,000.00			-	Note 13				
14 SouthGrow Contract	2,275.00	2,275	2,225.00	50	Note 14	2,275.00	2,275.00	4,550	4,550
15 Director of Advancement Contract	36,400.00	27,300	21,232.00	6,068	Note 15	38,649.33	24,786.63	30,224	15,925
16 Professional Fees:		-		-	Note 16				
a. Accountant/Audit	2,600.00	2,600	2,300.00	300		2,200.00			
b. Legal/Attorney/Professional	1,000.00	750		750		55,000.00	11,000.00		
c. Stakeholder Events/Memberships	3,500.00	3,500	2,670.00	830		3,220.00	920.00	55	449
17 Travel & Meeting Reimbursements:		-		-	Note 17				
a. Mileage/Airfare/Parking	3,000.00	2,250	1,680.10	570		482.64	898.57	445	802
b. Accommodation	2,000.00	1,500	374.69	1,125		2,133.60	881.08		550
c. Meals	500.00	375		375		120.00	80.00	13	47
d. Venue/Meeting Rooms	600.00	450		450					110
18 Event Expense (3 locations)		-		-	Note 18				
a. Venue/Meeting rooms/AV	1,000.00	750	852.90	(103)		630.00		250	
b. Meals/Catering	2,000.00	1,500	1,219.59	280		731.40	236.19	393	
c. Entertainment/Music	600.00	450		450				1,200	
d. Materials/Promo items	1,000.00	750	161.04	589		111.67		470	
19 Total Expenses	70,950	52,456	36,743.69	15,713	Note 19	117,201.04	51,184.96	44,184	23,281
20 Net Budget Surplus (Deficit)	(5,742)	(10,458)	23,192.63	2,225	Note 20	(27,751.43)	(10,759.93)	11,664	27,062
Ending Bank Balance			34,869.27						

Reconciled to August 21st

NOTES For the PERIOD

INCOME

- Note 2 Municipal Membership fees paid in full
- Note 3 Membership fees paid thru August 21th - 1 has cancelled
- Note 4 2022 GST refund paid in 2023
- Note 5 Bow Island Booth Cost-share

EXPENSES

- Note 7 EIA Printing & mailing, Flyers & chocolate for Med Hat Tradeshow
- Note 9 a. mail EIA to New AB Jobs Minister
d. Cellphone payment & useage contract through August
- Note 10 GST paid YTD
- Note 15 Dir of Adv Jan through July invoice
- Note 17 c. AUMA Membership, tradeshow booth Medicine Hat, Minister Toews Luncheon, 2024 Med Hat Tradeshow Booth
a. DoA parking Invest Alberta, DofA travel to Cypress County Pres, Med Hat Tradeshow, AGM Taber & Castlegar BC Hwy3 mtg.
b. DofA hotel for Med Hat Tradeshow & BC Hwy 3 mtg in Castlegar

Note 18

Annual General Meeting and June Special Meeting; in-person
d. \$129 printing of Fed Minister of Transport documents for binder

POWERFUL AGRICULTURAL FRANCHISE

- ~30% of CPKC Revenue
- Production growth at ~3% CAGR
- Linking origins & destinations
- Increased optionality + industry leading operating model

Better Together





CENTREPORT CANADA RAILPARK™



ADVANCE IN ALL DIRECTIONS



CENTREPORT CANADA RAILPARK™



focusequities.com



centreportcanada.ca

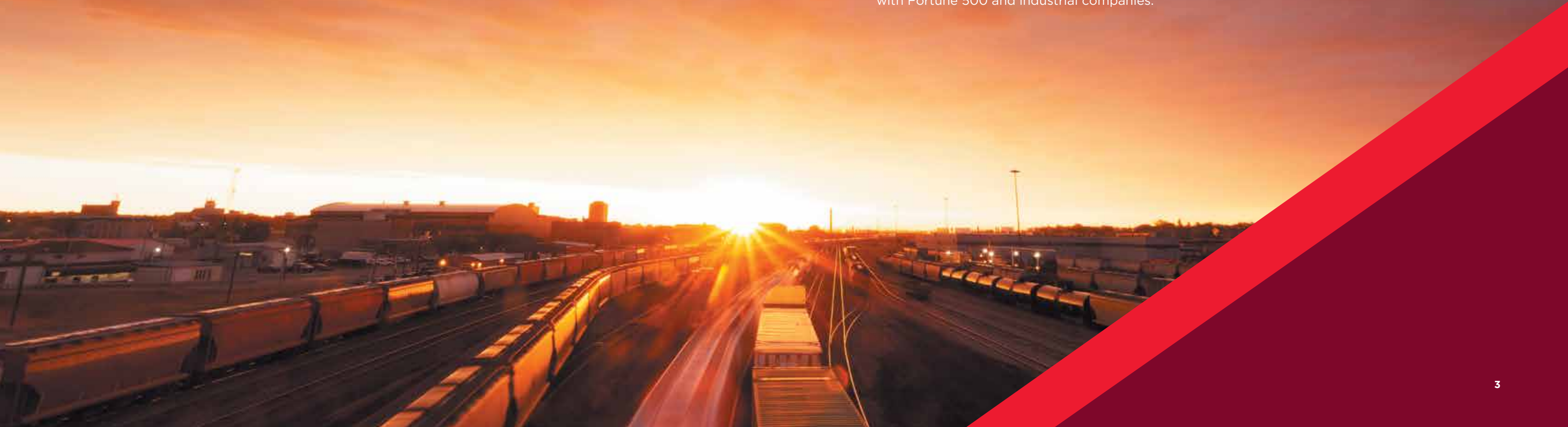
A UNIQUE OPPORTUNITY

IN SUPPLY CHAIN DEVELOPMENT

Strategically located within North America's largest trimodal inland port and Foreign Trade Zone at the junction of multiple transportation corridors, the CentrePort Canada Rail Park sets a new standard in logistics infrastructure.

Offering 665 acres of affordable, prime industrial land located in the heart of the continent, this development can leverage 24/7 worldwide cargo operations, an international trucking hub with some of Canada's largest carriers located onsite and access to three class one railways, presenting a unique opportunity for companies serving regional, national, and global clients.

Canadian real estate developer, Focus Equities, is leading this project with over 50 years of unique build-to-suit experience with Fortune 500 and industrial companies.



WINNIPEG

WINNIPEG RICHARDSON INTERNATIONAL AIRPORT

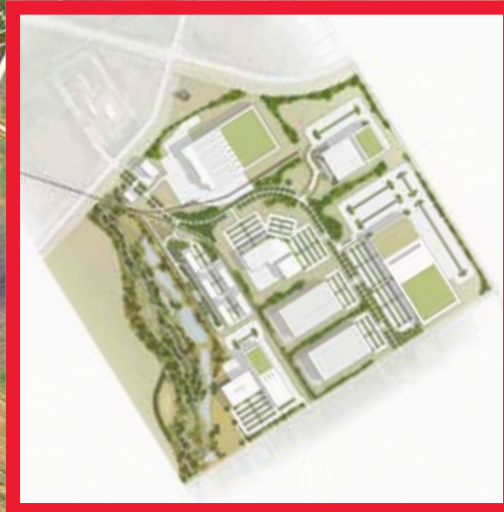
CENTREPORT CANADA WAY

Phase 1

Phase 2

Phase 3

CPKC MAIN LINE



- PHASE ONE 184-ACRES
- PHASE TWO 115-ACRES
- PHASE THREE 366-ACRES

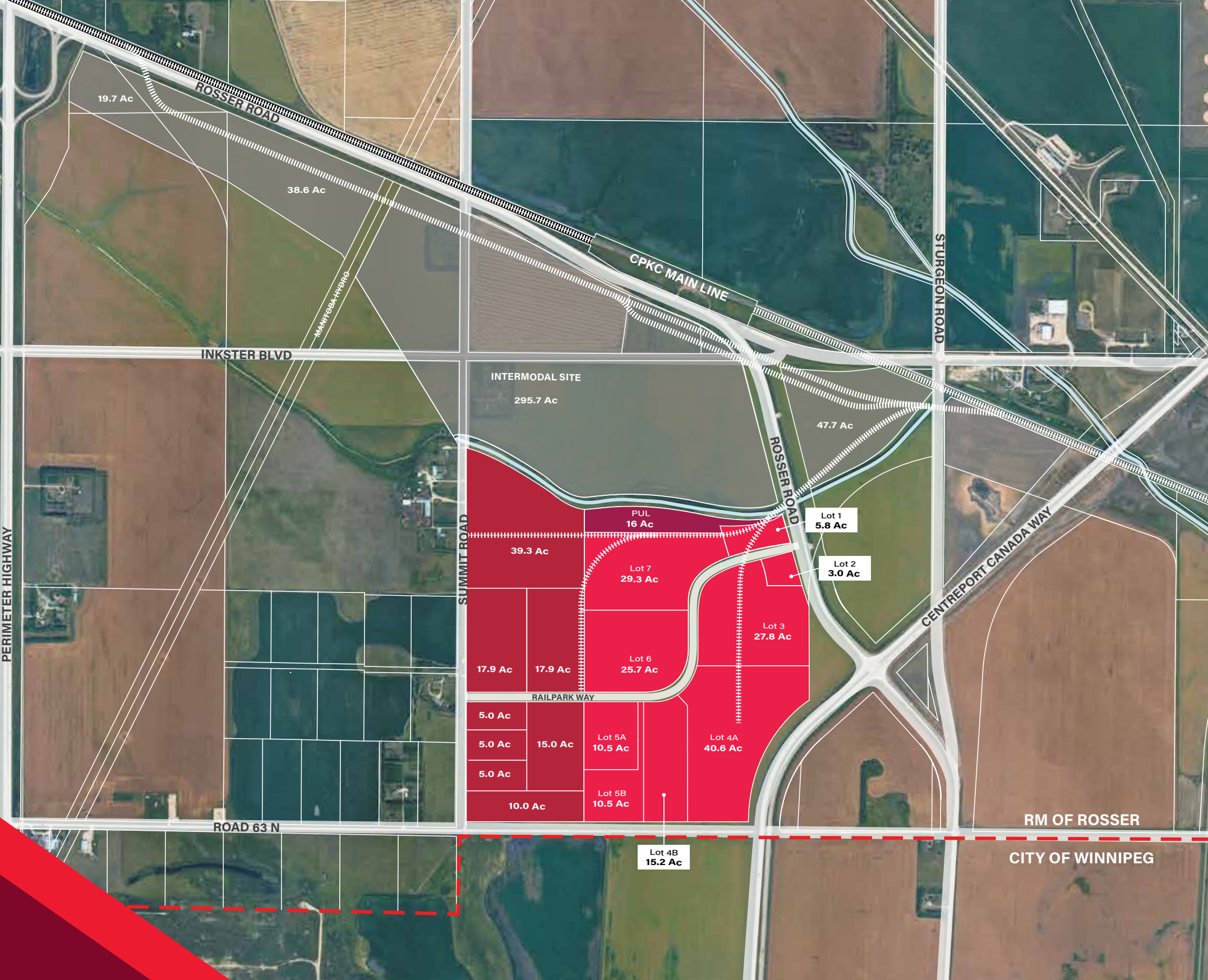
PERIMETER HIGHWAY

ACCELERATE YOUR SUCCESS

Custom build-to-suit solutions and fast-tracked land development approvals ensure speed to market.

- 665 acres of rail serviced industrial land, zoned I3 (heavy industrial)
- Fully-serviced lots from 5 to 100+ acres, lots can be combined
- Dedicated planning resource to expedite the planning and land development approval process available
- Located South of the CPKC Carberry Sub (CPKC's main east-west line across Canada)
- Access to \$1 billion in supporting highway infrastructure
- Area allows for three storey structures, totaling approximately 40m (131 ft) in height
- Natural gas and electrical utilities provided by Manitoba Hydro - 24 kV on site (66 kV is available through agreement with Manitoba Hydro)
- Strategically located within the Winnipeg Metro Region in the Rural Municipality of Rosser eliminates municipal business taxes

BUILD A FUTURE WITH GLOBAL CONNECTIONS



- Phase One 184 Acres
- Phase Two 115 Acres
- Phase Three 366 Acres

BUILDING A WELL-ROUNDED COMMUNITY

The holistic approach used in the development of the rail park will have a positive effect on every business here and the people they employ.

The inclusion of active bike trails and storage spaces, dedicated pedestrian corridors and green community spaces, will exceed the sustainability measures and active transportation components set out by the RM of Rosser zoning bylaws.

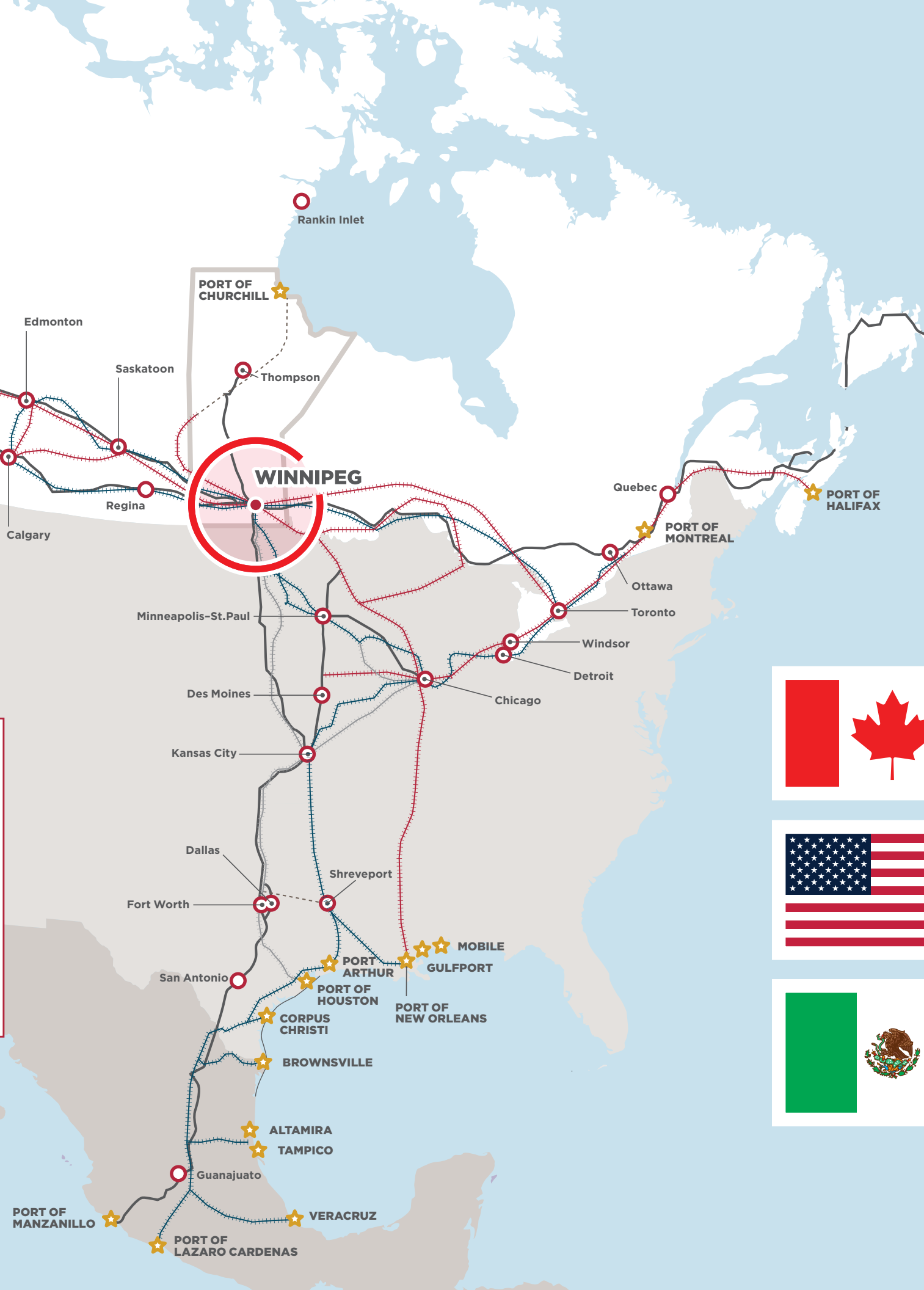


STRATEGIC ACCESS TO GLOBAL TRADE ROUTES

Located at the hub of international trading corridors, the CentrePort Canada Rail Park connects businesses to major markets and cities around the globe through rail, truck, and air transportation.

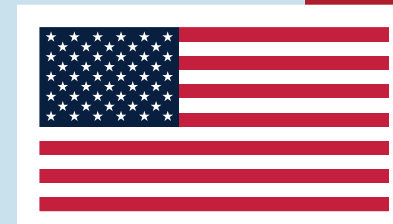
Winnipeg is the only city on the Canadian prairies with access to three Class 1 railways: CPKC, CN, and BNSF. The CentrePort Canada Rail Park will offer businesses direct access to CPKC, and through federal government regulated interswitching rules, access to all three. In turn, businesses will have the freedom to ship goods with the rail company of their choice allowing for fluid, seamless transportation.

- CentrePort Canada
- ☆ Port Cities
- CPKC Rail Lines
- CN Rail Lines
- BNSF Rail Lines
- Highway Routes
- Other Rail Lines



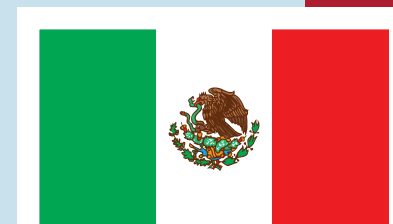
GATEWAY TO THE NORTH

- Staging area for northern Canada
- Access to Europe, the Middle East, North Africa & the Mediterranean



GATEWAY TO THE WEST

- Asia-Pacific Gateway
- Port Metro Vancouver & Port of Prince Rupert
- Access to China & Pacific Rim

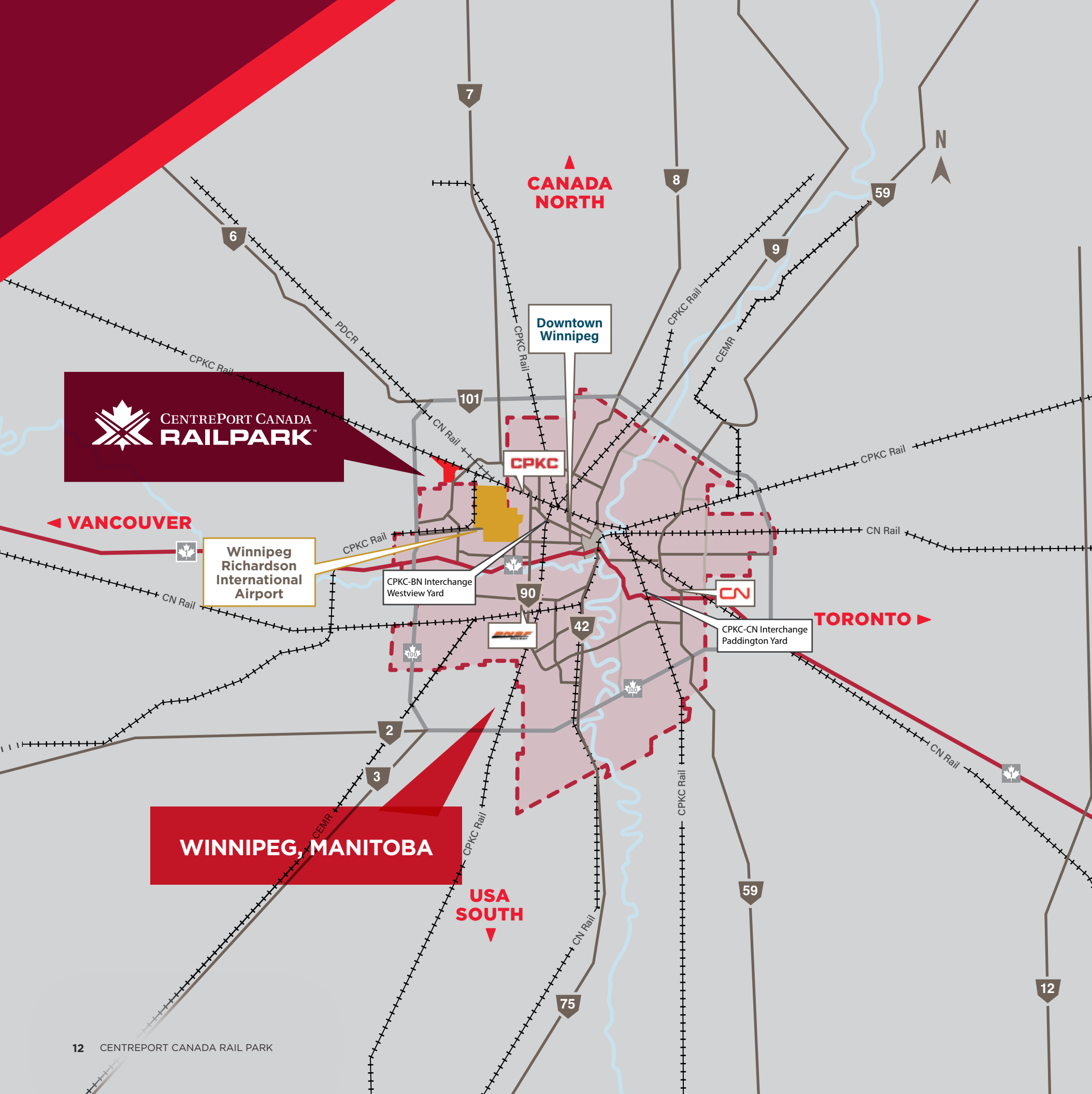


GATEWAY TO THE EAST

- Ports of Thunder Bay, Montreal & Halifax
- Atlantic Gateway
- Access to Europe, the Middle East & Asia

GATEWAY TO THE SOUTH

- Mid-Continent Trade & Transportation Corridor
- Access to United States & Mexico
- Ports of Houston & New Orleans
- Ports of Manzanillo & Lazaro Cardenas



DISCOVER OPPORTUNITY AT THE INTERSECTION OF RAIL, AIR AND ROAD

CentrePort Canada Rail Park is located within the largest trimodal inland port in North America with major highways, the largest freighter airport in the country and access to three major rail carriers.

CENTRAL RAIL ACCESS

The CentrePort Canada Rail Park will offer businesses direct access to CPKC, and through federal government regulated interswitching rules, access to CN and BNSF.



CENTRAL HIGHWAY ACCESS

Direct access to major national roadways, and additionally CentrePort Canada Way and the Perimeter Highway, helping companies get goods on the road faster, across the country, into the north, and into the United States.



- 100 million people within a 24-hour drive of Winnipeg Metropolitan Region (population: 845,000)
- Truck shipments can reach Denver, Kansas City, Chicago, and Detroit within 24 hours
- Interstate-quality highways on both east and west sides of the park, allowing for 5 mins to 90 km/55 mph



CENTRAL AIR FREIGHT AND PASSENGER CARRIERS

CentrePort Canada Rail Park is located only minutes away from the Winnipeg Richardson International Airport.



CANADA'S LARGEST FREIGHT AIRPORT READY TO FLY

The Winnipeg Richardson International Airport is #1 in Canada for dedicated freighter aircraft movements. It's also the largest freighter airport in the country, offering 24/7/365 operations. Around the clock operations and a central location and time zone enable operators to offer a later cut off for overnight deliveries to many major cities.

- Largest freighter airport in the country
- 24/7/365 cargo operations
- Over 4,700 cargo flights recorded in 2022 by carriers including UPS, DHL, FedEx and Cargojet

*Pre-covid airline map



WINNIPEG

WELCOME TO THE HEART
OF THE CONTINENT



Appreciated across the country for its outstanding arts and cultural scene, Winnipeg delivers an impressive array of museums, theatre, and ballet. It's also known nationally for its vibrant music scene made of both local and international artists, lively concerts and multiple ongoing festivals. Moreover, Winnipeg is a proud sports city, home to both the NHL's Winnipeg Jets and the CFL's Winnipeg Blue Bombers.

It's also an affordable city for families and young professionals, offering an excellent quality of life, short commutes, and some of the cleanest air and highest number of sunny days in Canada.



- Winnipeg was named one of TIME's World's Greatest Places (2021)
- Winnipeg was named the world's Most Intelligent Community by the Intelligent Community Forum (2021)



The Manitoba Museum
Photo Credit: Tyler Walsh/Tourism Winnipeg



Canada Day at The Forks
Photo Credit: Maddy Reico/Tourism Winnipeg



Winnipeg Jets Whiteout Party
Photo Credit: Tyler Walsh/Tourism Winnipeg

REDISCOVERED CONNECTIONS

RENEWED GROWTH

In 1881, the Canadian Pacific Railway was built through Winnipeg, putting the city on track to becoming a major North American transportation hub and forecasted to be one of its largest cities.

As a central location on the transcontinental railway, Winnipeg rapidly grew and earned the nickname 'Chicago of the North'. However, circumstances arose as other trade routes were developed, and Winnipeg's prominence diminished.

The last decade has seen the winds change yet again to favour the city's advantageous location and powerful workforce. The CentrePort Canada Rail Park is another step towards a new era of growth and prosperity for the region.

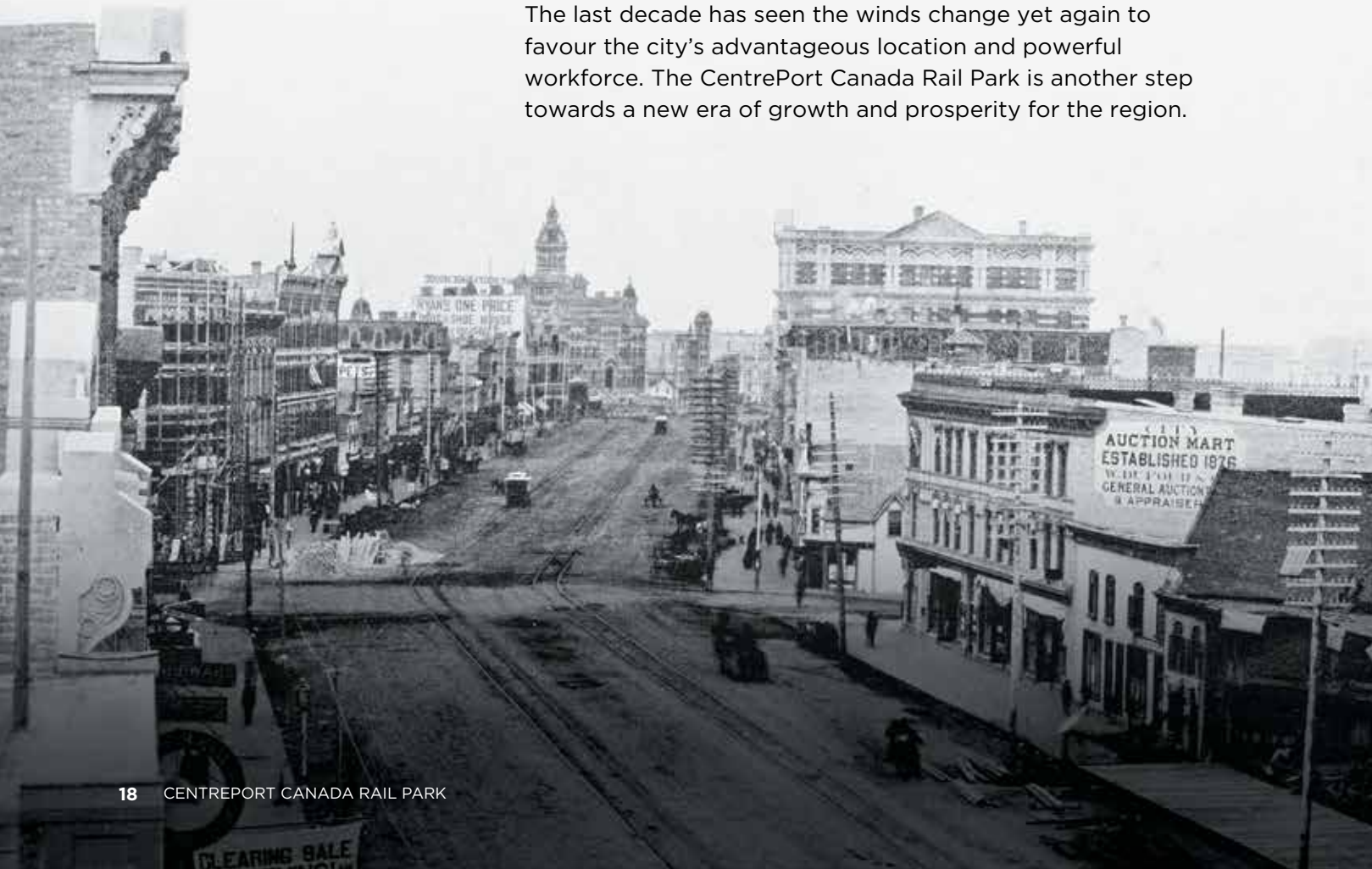


Photo Credit: Tyler Walsh/Tourism Winnipeg

From manufacturing and aerospace to emerging technologies and transportation logistics, Winnipeg has found its footing as a highly successful area for new development.

- 99.6% of electricity generated in Manitoba comes from reliable, clean renewable resources including wind farms, solar panels, and hydroelectric dams.
- Winnipeg also boasts the lowest business costs in the Midwest, the lowest green energy costs in the country, and access to a skilled, reliable and affordable workforce, making it an attractive/prime location for any business to set up shop.

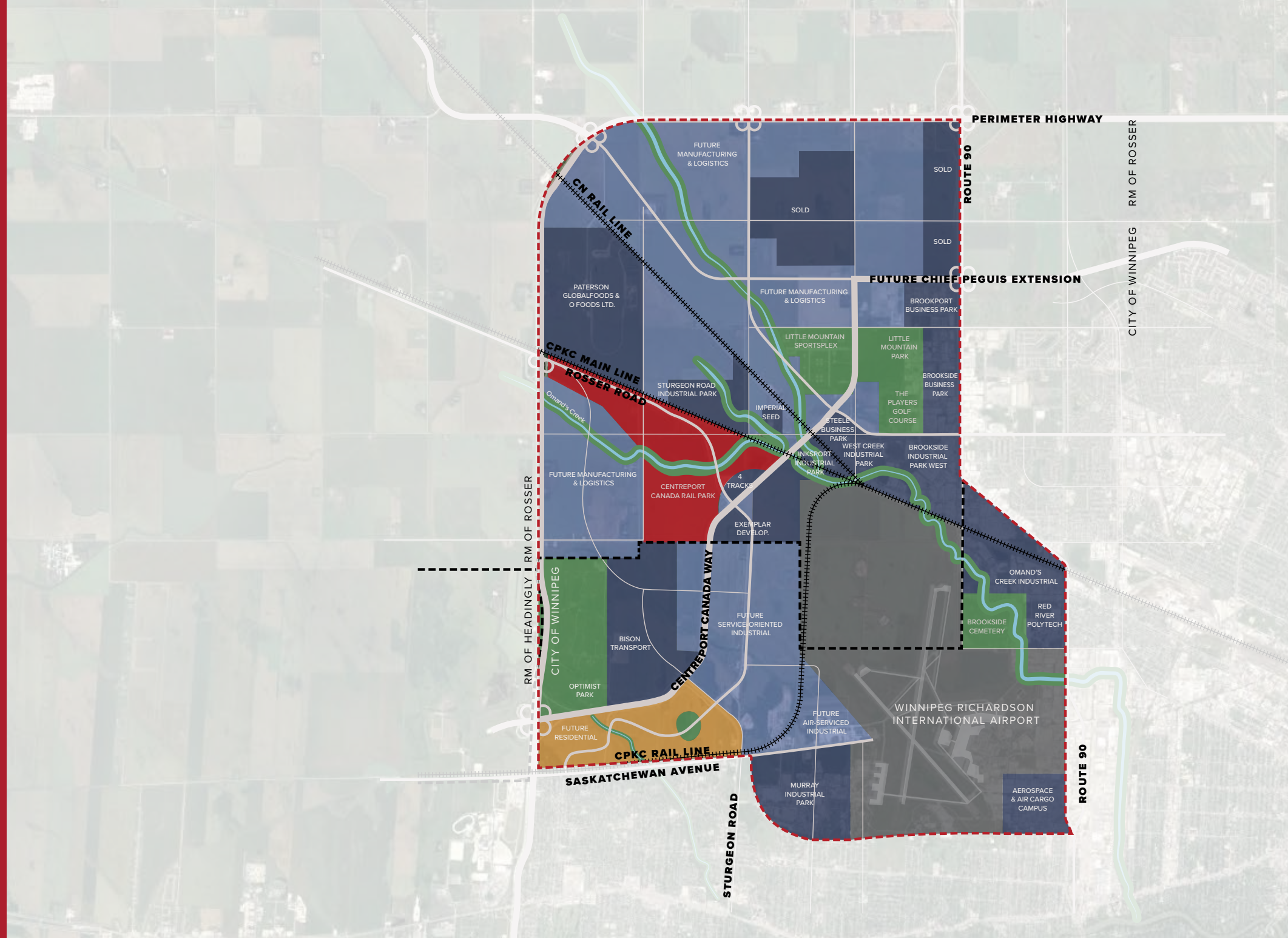


OPPORTUNITIES YOU CAN EXPAND ON

CENTREPORT CANADA

Planned as a complete community, CentrePort Canada offers much more than access to global gateways:

- 20,000 acres of prime, affordable industrial land
- 665 acre rail park
- Foreign Trade Zone advantages
- Dedicated planning resource to expedite the planning and land development approval process
- Major industry leaders located on site
- Affordable skilled labour
- Renewable, reliable, low cost energy
- 500 acre future residential community
- Situated one hour north of the Canada-US border



EXISTING & PLANNED TRANSPORTATION

- Highway / Expressway
- Arterial
- Collector
- Rail Line

BOUNDARIES & NATURAL FEATURES

- Municipal Boundary
- CentrePort Boundary
- Creek

EXISTING & PLANNED LAND USE

- CentrePort Canada Rail Park
- Industrial Land - Developed / Planned
- Industrial Land - Future Development
- Winnipeg Richardson International Airport
- Residential Land
- Parks & Open Space



CPKC Railway

IN GOOD COMPANY AT THE CENTRE OF IT ALL

Over 1,000 companies from a variety of sectors are located within CentrePort Canada. The strategic central location, along with the logistical and tactical advantages of being located within the inland port, continues to draw companies across dozens of industries.



National Research Council of Canada

KEY INDUSTRY SECTORS

- Agribusiness and food processing
- Advanced manufacturing
- Energy and mines
- Biomedical
- Transportation and logistics
- E-commerce



Boeing Winnipeg Composite Division



Bison Transport



Nutrien



Cargojet



**FOCUS
EQUITIES**
A MARIASH COMPANY

**WELL ESTABLISHED
AND FIRMLY FOCUSED
FOR OVER 50 YEARS**

With a long track record of investment, project financing and development in real estate, infrastructure and mining throughout Western Canada, Focus Equities' portfolio of success includes flagship developments: Aurum Energy Park in Edmonton, Alberta; Deerfoot Meadows and Meadows Mile in Calgary, Alberta; as well as Bayview Place in Victoria, British Columbia.

Our disciplined approach to market analysis and prudent economic forecasting ensures we are always investing at the leading edge of growth for the benefit of our partners and clients.

Focus Equities specializes in real estate, infrastructure, power, and mining.



BAYVIEW PLACE



**MEADOWS
MILE**



**DEERFOOT
MEADOWS**



**KENNETH WILLIAM
MARIASH, SR.**

The Developer / Owner

Kenneth William Mariash, Sr., working alongside wife and partner Patricia Mariash, is regarded as one of the most visionary developers in North America, and has transformed millions of square feet into profitable commercial and residential ventures. With his baccalaureate degrees in mathematics, science, business, accounting and architecture, an MBA and 45 years of building construction, real estate development and investing, Mariash's experience and business acumen is key to the success of their large scale projects.



**PATRICIA
MARIASH**

The Interior Architect / Owner

For more than 30 years Patricia Mariash has been a real estate entrepreneur and commercial interior architect who has successfully completed thousands of prestigious corporate headquarters. Before becoming engaged in the commercial real estate development business, Patricia founded her own award-winning commercial interior architecture business. These projects encompassed more than 20 million square feet and represented some of the world's most notable corporate headquarters throughout North America and Europe.



Edmonton, Alberta, Canada

Aurum Energy Park —
Connecting Alberta's \$250 billion
energy sector

Aurum Energy Park is a 750-acre development in Edmonton Alberta that combines the advantages of ideal location, access to major transportation routes and rapidly expanding services. It's perfectly positioned for the next phase of industrial and energy sector expansion.

BAYVIEW PLACE

Victoria, British Columbia, Canada

The Bayview and Roundhouse communities stretch over 20 prime acres on the last developable piece of land on Victoria's renowned Inner Harbour. With spectacular 360° views, Bayview offers waterfront access and walkways leading to downtown and the Inner Harbour.

Bayview residents enjoy an extraordinary level of amenities and services, with a full range of luxurious details. And the beautiful natural surroundings aren't just for gazing at: convenient year-round recreational activities include kayaking, hiking, running, cycling, yachting, sport fishing, bird-watching, tennis, and more.





MEADOWS MILE

Calgary, Alberta, Canada

Meadows Mile is a 27-acre parcel that extends almost a mile in length overlooking all of Deerfoot Meadows, a Mariash shopping, dining, and entertainment destination.

Surrounded by more than 4 million square feet of retail and commercial development, Meadows Mile is strategically located to capitalize on Calgary's growing affluence, and on existing regional shopping destinations.



Calgary, Alberta, Canada

Quickly becoming one of the most dynamic shopping locations in North America.

Deerfoot Meadows straddles the Deerfoot Trail, the main north-south freeway in Alberta, crossing the Glenmore Trail one exit to the north of the site, which connects with the Trans-Canada Highway. These freeways carry over 200,000 cars per day.

Deerfoot Meadows stretches over 3.5 million square feet of total development, drawing shoppers from the neighboring provinces of Saskatchewan and British Columbia. No other retail centre in Canada can boast the same geographic synergies and benefits as Calgary's Deerfoot Meadows.

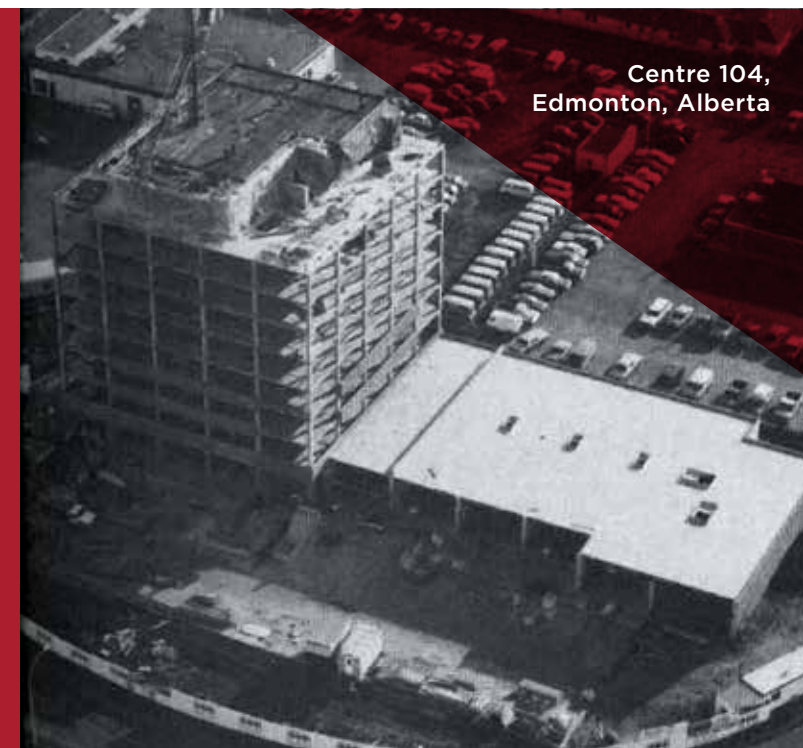




Norwester Industrial Park,
Edmonton, Alberta

VISIONARIES WITH AN EYE FOR DETAIL

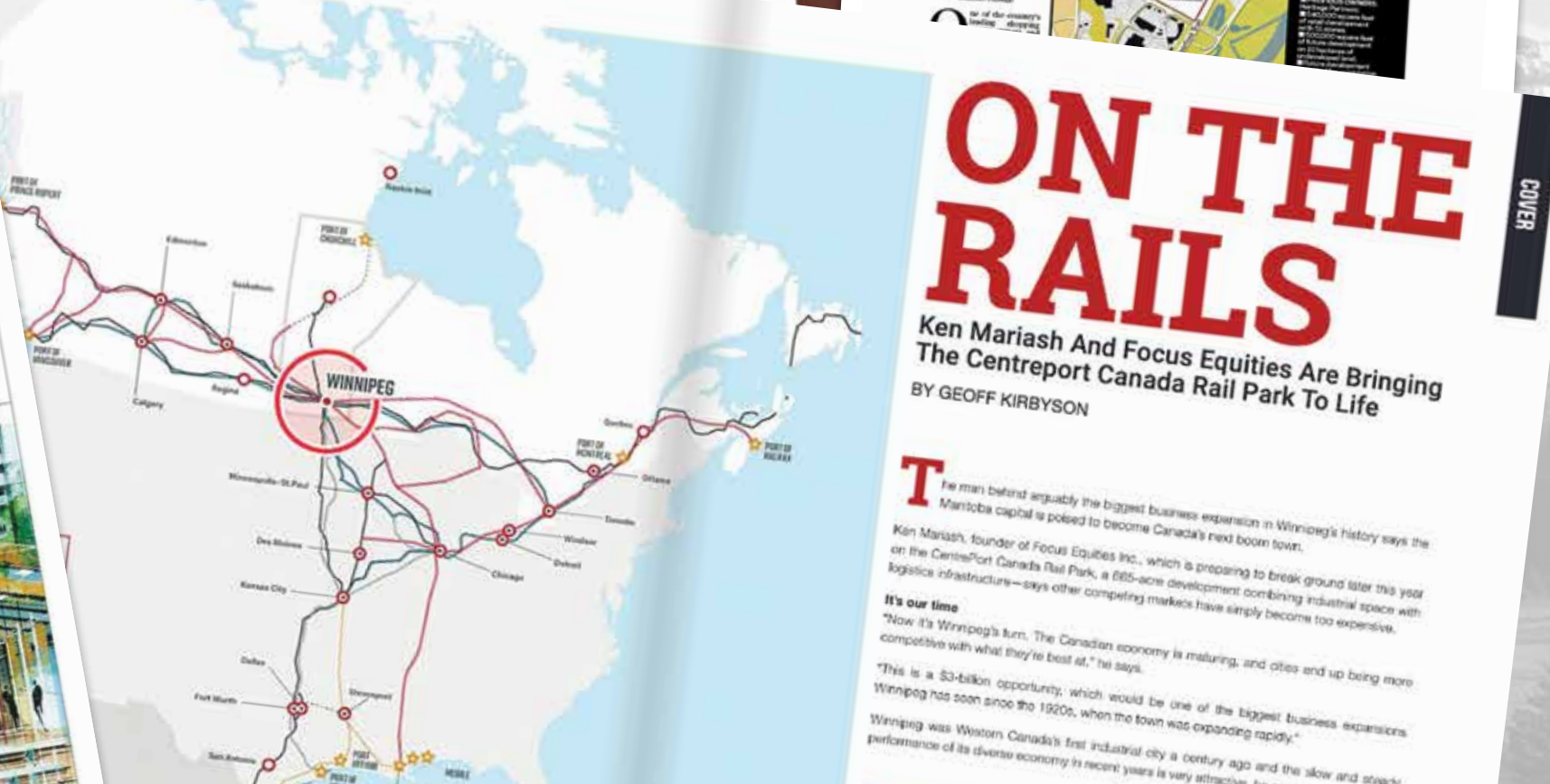
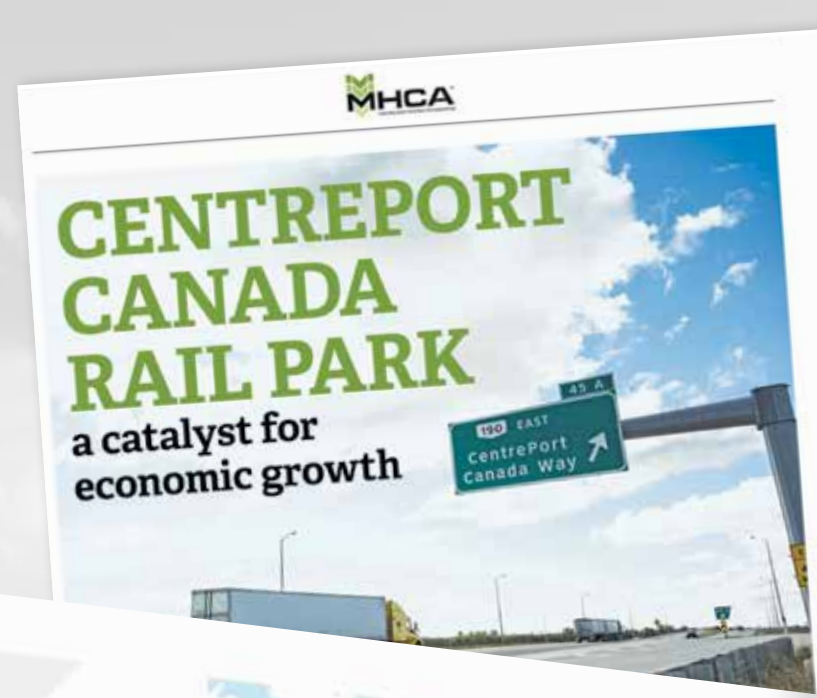
The Focus Equities team brings decades of experience to the planning table, ensuring each project is thoroughly managed from start to finish.



Centre 104,
Edmonton, Alberta



Village at Southgate,
Edmonton, Alberta



A TRUE SUCCESS STORY

Focus Equities is a trusted and respected company that has a history of enriching communities and enhancing economic opportunities across the country.





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THE DEVELOPER

Focus Equities, a Canadian corporation, provides the full range of development, investment, financing, construction and operation of complex real estate, energy and infrastructure projects. Founded over 40 years ago by Canadian entrepreneur and visionary Kenneth Sr., Focus Equities has an extraordinary track record of success.

In real estate, Focus Equities acts both as the developer of large complex projects and as an active financial investor. Focus Equities and its associated companies have developed, purchased, or sold more than 15 million square feet of real estate and more than 10,000 residential /condominium units throughout North America.

Focus Equities' subsidiary, Focus Energy Group, develops and finances large-scale energy infrastructure projects around the globe, with a particular focus on power generation and LNG infrastructure. Through expertise in commercial, financial, regulatory, and technical development, from conception to commercial operations, Focus Energy Group, delivers environmentally friendly and economically viable energy solutions worldwide.



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THE FACILITATOR


CentrePort Canada Inc. is the master planner and facilitator responsible for providing business development and investment attraction strategies that support economic growth and create jobs; and marketing and promoting the inland port locally, nationally and internationally.

The corporation provides single-window services to business including direct access to federal Foreign Trade Zone (FTZ) benefits (sales tax and duty relief, custom-bonded warehouse program) as well as the ability to work collaboratively with companies and governments to expedite and facilitate development.

The corporation's mandate is set out in the CentrePort Canada Act, passed by the Province of Manitoba in 2008.


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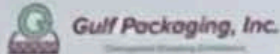
Another Project by Focus Equities



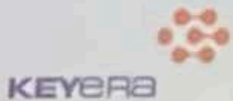
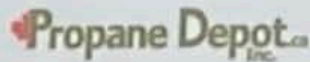
ADVANCE IN ALL DIRECTIONS

80 Saghalie Road
Victoria BC | V9A 0A1

INDUSTRIAL DEVELOPMENT- ANNOUNCED PROJECTS



ALGOMA





ADM 16: Public Participation Policy

RECOMMENDATION:

That Council approves ADM 16: Public Participation Policy as presented.

PURPOSE:

This policy establishes the foundation for the Town of Fort Macleod's principles, expectations, responsibilities, and procedures for conducting public participation.

BACKGROUND:

- February 28, 2022: Council made a motion to the Public Participation Policy.
- January 2023: At the Council retreat, this policy was reviewed, and discussions were had on improvements.
- March 13, 2023: A revised version of the policy was brought forward. Council passed a motion for more discussion on this policy at a Committee of the Whole meeting.
- April 18, 2023: Committee of the Whole meeting the policy was brought back with changes and discussed further.
- June 2023: A survey was sent to Council to ensure their top priorities were captured in the revisions.

SUMMARY OF CHANGES

Here's a summary of the key differences:

- **Definitions:**

Original Policy: The original policy provides definitions for terms such as "Community," "Public participation," "Stakeholder," "Statutory Requirement," and "Non-Statutory Requirement."

Revised Policy: The revised policy provides definitions for terms like "CAO," "Municipal Stakeholder," "Public Participation Plan," and "Public Participation Tools." It also clarifies that "Community" has the same meaning as "Municipal Stakeholders."

- **Responsibilities:**

Original Policy: The original policy briefly outlines the responsibilities of Town Council, the Chief Administrative Officer (CAO), and Municipal Stakeholders.

Revised Policy: The revised policy simplifies and condenses the responsibilities section, focusing on the responsibilities of Town Council, CAO, and Municipal Stakeholders.

- **Public Participation Plans:**

Original Policy: The original policy provides specific circumstances under which public participation plans should be developed.

Revised Policy: The revised policy adds new circumstances for developing public participation plans, such as when Council has made a previous commitment for engagement or when the decision is controversial.

- **Determining The Level Of Participation:**

Original Policy: The original policy does not explicitly mention the International Association of Public Participation (IAP2) Spectrum of Public Participation.

Revised Policy: The revised policy explicitly references the IAP2 Spectrum of Public Participation and provides a framework for determining the level of involvement and influence for different proposals, processes, and projects.

- **Public Participation Tools:**

Original Policy: The original policy does not categorize or specify types of public participation tools.

Revised Policy: The revised policy categorizes and provides examples of various public participation tools, including in-person, digital, written, and representative participation.

- Principles:

Original Policy: The original policy emphasizes principles such as shared responsibility, transparency, inclusivity, appropriateness, and continual improvement.

Revised Policy: The revised policy introduces principles of authenticity, inclusiveness, appropriateness, transparency, and continual improvement, with more specific details on how these principles should be applied.

Overall, the revised policy appears to be more structured and provides more precise guidance on public participation, including specific references to legislation, definitions, and tools, while also simplifying some of the responsibilities. It also introduces new elements, such as the IAP2 Spectrum of Public Participation, to guide decision-making on the level of public involvement.

COUNCIL STRATEGIC PLAN:

This submission is improving SERVICE in Fort Macleod. (Supporting priorities such as Public Engagement and Relationships.)

APPLICABLE LEGISLATION:

Section 216.1 of the *Municipal Government Act*.

ATTACHMENTS:

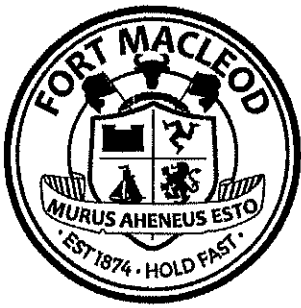
ADM 16: Public Participation Policy (DRAFT Revision)

ADM 16: Public Participation Policy (Original)

AUMA Public Participation Citizen Engagement

PREPARED BY: Meranda Day Chief, Executive Assistant

APPROVED BY: Anthony Burdett, CAO



PUBLIC PARTICIPATION POLICY

Policy Number:	ADM16
Administered By:	Chief Administrative Officer
Approved By:	Town Council
Effective Date:	February 2018

Purpose:

The Town of Fort Macleod will be responsible to the citizens of the Town by establishing a Policy that provides direction to Town Council and Administration on how to obtain stakeholders input into matters and decision that affect the Community.

Scope:

This Policy applies all members of Town Council and the Chief Administrative Officer.

Responsibilities:

Town Council shall:

- Consider public input obtained through public participation activities as part of their decision-making process.
- Promote public participation activities and provide, where appropriate, Council member representation.
- Establish consistent practices, processes and timelines for statutory and non-statutory requirements for public participation.
- Ensure appropriate resources are available to allow for the on-going implementation of consistent, comprehensive and representative public participation programs and services.
- Request information from the Chief Administrative Officer on the scope, timing, appropriate methods and resources required for public participation activity on a specific issue or item.

The Chief Administrative Officer (CAO) shall;

- Maintain public participation processes that:
 - Ensure a coordinated and standardized approach to public participation across the organization.
 - When determining the appropriate level of public participation, that the Town:
 - Provides opportunities for early and ongoing participation.
 - Aligns resources, types and methods of public participation with the impact of the decision to the community and/or key stakeholder groups.
 - Provides opportunities for ongoing engagement as well as for emerging issues.
- Recommend to Council practices, processes and timelines for statutory and non-statutory requirements for public participation activities.
- Develop all necessary processes and tools that support the implementation of this Policy.
- Communicate to Council and community, where appropriate, how public input was gathered and used in Administrative recommendations to Council.
- Bring forward resourcing requirements to ensure public participation programs and services are run effectively and consistently.
- Make recommendations to Council on the appropriate resources required for public participation, when council directs public input on a specific issue or item.

- Ensure that this Policy is reviewed, and if necessary, updated at a minimum every four (4) years or as required by Provincial legislation.

Definitions:

Town - the municipal corporation of the Town of Fort Macleod

Community – includes Town residents, businesses, schools, religious institutions and all other institutions or agencies that make up the Town of Fort Macleod.

Public participation – means processes through which the Town provides opportunities for the community to have input into decision-making through public meetings, surveys, open houses, workshops, polling, resident advisory committees and other forms of engagement.

Stakeholder – an individual, organization or group that has an interest in an issue, will be or is likely to be affected by an issue, or has the ability to affect a decision or outcome.

Statutory Requirement – a requirement written into law passed by the Provincial or Federal Government.

Non-Statutory Requirement – a rule based on customs, precedents or court decisions.

Policy:

Fort Macleod Town Council and Administration recognize that quality public participation is a critical component to good governance and as such, adequate resources will be allocated and the appropriate level of public participation will be undertaken. The Town is committed to public participation activities that are founded on the following principles:

Shared Responsibility and Commitment: Public participation leads to better decisions and is a shared responsibility of Council, Administration and the community.

Transparent and Accountable: The Town communicates clearly and openly about public participation opportunities, its processes, and provides factual and evidenced-based information. It shares the outcomes of public participation, including how the information was used in the decision-making process and makes decisions in the best interest of the community as a whole.

Inclusive and Accessible: The Town endeavors to provide opportunities for public participation that take into account the diversity of needs, abilities and viewpoints of the members of the community.

Appropriate and Responsive: Public participation activities need to be appropriate to the stated goals and reflective of the varied preferences and needs of the community members for receiving and sharing information.

Evaluation and Continual Improvement: Public participation is a dynamic and evolving process that needs continual evaluation and adjustment to continuously improve and address the changing needs of the community.

Procedure:

The Town shall comply with all Provincial and Federal requirements for public participation.

The Town shall offer public participation opportunities when:

- Identifying Council priorities.

- Formulating recommendations to Council regarding the proposed strategic plans and budgets.
- Gathering community input following the presentation of proposed strategic plans and budgets.
- Reviewing existing programs, services and associated service levels.
- Establishing new programs services and service levels.
- Otherwise deemed necessary by Council or the CAO.

The Town will organize at least one (1) statistically representative public participation activity at least every two (2) years to obtain the community's overall perceptions of quality of life and satisfaction with programs and services.

The Town will have the appropriate allocation of resources and governance mechanisms to build organizational and community capacity for public participation through community outreach and education activities.

The Town will communicate to the community it's public participation goals, objectives and processes, including how information will be used and decision are made.

The Town will ensure the results of the public participation activities are publicly available, which includes posting them on the Town's website.

The Town will, where possible, use various methods and techniques for public participation that meet the varied needs of the community whether it be demographic, physical, social or cultural.

The Town will evaluate and learn from the feedback received from the community, as well as look for new and better processes and tools that address the changing needs of the community.

Further Information:

For further information regarding this Policy, please contact the department identified in the title bar under Administered By.



CAO – Town of Fort Macleod



PUBLIC PARTICIPATION POLICY

Policy Number:	ADM16
Administered By:	Chief Administrative Officer
Approved By:	Town Council
Effective Date:	
Version #:	DRAFT # 11
References:	Alberta Municipalities AUMA/AAMDC Citizen Engagement Toolkit International Association of Public Participation IAP2 Spectrum of Public Participation

Purpose:

This policy establishes the foundation for the Town of Fort Macleod's principles, responsibilities, expectations, and procedures for conducting public participation.

Legislation:

- a) This policy has been developed by Section 216.1 of the *Municipal Government Act* (MGA). This Policy is in addition to and does not modify or replace the circulation, notification, or statutory public hearing requirements of the MGA.
- b) Nor does it modify or replace the circulation and notification requirements for development permitting processes as contained in the Town's Land Use Bylaw.
- c) All activities undertaken per this policy shall comply with the Freedoms of Information and Protection of Privacy Act, associated regulations, and any amendments to it.
- d) This policy will be available for public viewing and accessible on the Town of Fort Macleod's website.
- e) This policy shall be reviewed once every four years at minimum, as requested by the *Municipal Government Act*.

Scope:

This Policy applies to all members of Town Council, Administrative staff, and Municipal Stakeholders regarding public participation.

Definitions:

CAO: This means the Chief Administrative Officer of the Municipality or their delegate.

Town: The municipal corporation of the Town of Fort Macleod.

Public Participation: Includes a variety of non-statutory opportunities where Municipal Stakeholders receive information and provide input to the Town of Fort Macleod.

Municipal Stakeholder: The residents of the municipality, as well as other individuals, organizations, groups, businesses, or persons that may have an interest in, or are affected by, a decision made by the Town of Fort Macleod. For this policy, the community has the same meaning as municipal stakeholders.

Public Participation: This means an interactive process between the Town, the public and stakeholders designed to increase mutual understanding, gather information, exchange ideas, and solve problems to make better, more informed decisions.

Public Participation Plan: This means identifying which public participation tools will be used to obtain public input in a particular circumstance.

Responsibilities:

1) Town Council is responsible to:

- Consider public input obtained through public participation activities as part of their decision-making process.
- Promote and support public participation activities and provide, where appropriate, Council member representation.
- Establish consistent practices, processes, and timelines for statutory and non-statutory requirements for public participation.
- Ensure appropriate resources are available to allow for the ongoing implementation of consistent, comprehensive and representative public participation programs and services.
- Request information from the Chief Administrative Officer on the scope, timing, appropriate methods and resources required for public participation on a specific issue or item.

2) The Chief Administrative Officer (CAO) is responsible to:

- Maintain coordinated and standardized public participation processes across the organization, considering the impact of decisions on the community and stakeholders and providing ongoing engagement opportunities.
- Develop necessary processes and tools to support the implementation of this policy.
- Communicate to the Council and the community, when appropriate, how public input was collected and used in administrative recommendations to the Council.
- Review and update this policy at least every four years or as provincial legislation requires.
- Make this policy available for public inspection and publish it on the Town's website.

3) Municipal Stakeholders are responsible to:

- Bring honest and respectful input.
- Stay abreast of public participation opportunities through the Town's website, local media, and other communication channels.

Public Participation Plans:

Public participation plans can vary in complexity, depending on the matter. It may involve a one-time opportunity or providing educational information to the public for fundamental issues. A detailed plan outlining timelines, steps, tools, and techniques may be developed for more complex matters.

Not all proposals, processes, or projects require a comprehensive participation process. The level of participation can vary based on the scale, scope, and potential impact on the community. If a decision has limited room for change or little opportunity for public influence, an extensive participation process may not be necessary or practical. However, if a proposal significantly impacts the community and allows meaningful input, the Town will undertake robust and inclusive participation processes.

Public participation plans are essential to ensure appropriate and effective engagement in the Town of Fort Macleod. These plans will be developed and implemented under specific circumstances, which include:

- Conducting statistically representative public participation activity at least every two years to obtain the community's overall perceptions of quality of life and satisfaction with programs and services.
- Gathering community input for Council priorities, strategic plans, and budgets.
- When Council has made a previous commitment for engagement, has engaged on a similar decision, or requests public participation.

- Developing Municipal Plans.
- Establishing new services and service levels.
- The decision is controversial because it will generate significant and diverse interests and opinions among Municipal stakeholders.

Public participation will not be implemented in the following circumstances:

- Emergency or extraordinary situations.
- Low-impact decisions.
- Cases where input cannot change or influence the decision-making process.
- When there are insufficient resources available.

The Alberta Municipalities Citizen Engagement Toolkit and International Association of Public Participation (IAP2) Spectrum of Public Participation may be used as a guideline for preparing Public Participation Guidelines.

Determining The Level Of Participation:

The potential impact of a given proposal process The International Association of Public Participation (IAP2) Spectrum of Public Participation will be the guiding framework for the CAO (and Council) in determining the level of involvement and influence decided upon for proposals, processes and projects.

A Public Participation Plan may be drawn up to guide the level of Public Participation that best fits the situation's needs based on the IAP2 spectrum.

IAP2 Spectrum of Public Participation



IAP2's Spectrum of Public Participation was designed to assist with the selection of the level of participation that defines the public's role in any public participation process. The Spectrum is used internationally, and it is found in public participation plans around the world.

		INCREASING IMPACT ON THE DECISION				
		INFORM	CONSULT	INVOLVE	COLLABORATE	EMPOWER
PUBLIC PARTICIPATION GOAL		To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	To obtain public feedback on analysis, alternatives and/or decisions.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision making in the hands of the public.
	PROMISE TO THE PUBLIC	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.

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Public Participation Tools:

Tools, techniques and mechanisms that may be used, alone or in combination, to create Public Participation opportunities, including but not limited to;

- a) **In-Person Participation**
Examples may include at-the-counter interactions, open houses, workshops, meetings, interviews, focus groups, door-knocking, and round tables.
- b) **Digital Participation**
Examples of digital participation may include online surveys and polls, workbooks, chat groups, webinars, and message boards/forums.
- c) **Written Participation**
Examples may include written submissions, emails, mail-in surveys, polls and workbooks.
- d) **Representative Participation**
Examples of representative participation include being appointed to an advisory committee, board, commission, ad hoc group, or citizen jury.

Principles:

The Town of Fort Macleod is committed to engaging Municipal Stakeholders for effective decision-making. They prioritize the following principles:

Authentic: A primary purpose of the Public Participation process is to generate public views and ideas to help shape local government action or policy rather than persuade residents to accept a decision already made. The public's opinions, preferences and recommendations are documented and seriously considered by decision-makers.

Inclusive & Accessible: The Town endeavours to provide opportunities for public participation that consider the diversity of needs, abilities and viewpoints of the community members. Some members prefer information in digital format and through digital tools. The participatory process undertaken by the Town will try its best to consider all ways the community wishes to obtain information and communication.

Appropriate and Responsive: Public participation process utilizes one or more discussion formats that are responsive to the needs of identified participant groups and encourages full, authentic, effective and equitable participation consistent with process purposes. This may include relationships with existing community forums. Activities must be appropriate to the stated goals and reflective of the varied preferences and needs of the community members for receiving and sharing information.

Transparent and Accountable: The Town communicates clearly and openly about public participation opportunities and processes and provides factual and evidenced-based information. It shares the outcomes of public participation, including how the data was used in the decision-making process and makes decisions in the best interest of the community as a whole.

Evaluation and Continual Improvement: Public participation is a dynamic and evolving process that needs continual assessment and adjustment to improve and address the community's changing needs continuously.

Citizen Engagement TOOLKIT



AUMA/AAMDC



INTRODUCTION

Welcome to the Alberta Urban Municipalities Association and the Alberta Association of Municipal District and Counties Citizen Engagement Toolkit.

The purpose of this toolkit is to provide you, whether an elected official or member of municipal administration, some helpful and practical advice and tools to support effective citizen engagement. It has been developed to have application for Alberta municipalities of all sizes and in regard for differences in geographic locations and demographics. As you make your way through the toolkit, consider the content and resources to be a guide to your citizen engagement opportunities; customize the application of the toolkit to fit the needs of your municipality.

Citizen engagement provides municipalities a means to incorporate citizen values, interests, needs and desires into their decision-making processes and decisions. It improves municipal decision-making by bringing all perspectives to the table.

While there are risks associated with citizen engagement, it can be extremely beneficial with some thoughtful and careful planning. This toolkit includes helpful best practices to give you good food for thought as you consider how best to engage with your citizens; it also provides all the relevant templates to design and plan engagement activities, move you to action and then evaluate your progress. No two elected officials or municipalities needs are the same, which makes it critical to invest in your own approach – one that is designed for your unique context.

This toolkit is laid out in four sections, each designed with a specific purpose.

Section 1 will deliver the benefits and opportunities associated with citizen engagement.

It will open with a brief history of citizen engagement and explain its importance to municipal governance as well as its connection to community development. It will describe the relationship between citizen engagement and democracy as well as the influence of technology on the practice.

Section 2 will emphasize the necessary elements to mitigate risk and prepare for successful citizen engagement activities.

It will outline municipal engagement requirements as they relate to the *Municipal Government Act* as well as the role of a citizen engagement framework and policy in supporting municipal-led citizen engagement projects. It will introduce risks and concerns related to the implementation of citizen engagement, as well as how to connect appropriate citizen engagement techniques with municipal decision-making. It will shine a spotlight on the importance of internal decision-makers supporting engagement projects.

Section 3 emphasizes your municipality's readiness.

It will provide a step-by-step look at the components that make-up meaningful citizen engagement projects, including the roles of elected officials and administration as well as corresponding techniques and tools for communication and engagement.

It will support municipalities to set desired outcomes for citizen engagement projects and feel confident selecting opportunities to engage citizens. It will guide municipalities in their work to identify target participants, assess public perception of the engagement issue or decision at hand, select in-person and digital techniques and tools, as well as provide strategies that focus on citizen recruitment. It will go further to provide recommendations on how to effectively communicate about your engagement project.

Section 4 will emphasize the importance of evaluating the process and the impact of citizen engagement on achieving municipal outcomes.

It will provide guidance on setting performance measures, tracking progress, analyzing citizen input and reporting back to participants and the public on engagement results.



Section 1: SETTING THE STAGE

- 1.1 Municipal governance, citizen engagement and community development
 - 1.1.1 A brief history of citizen engagement
 - 1.1.2 Citizen engagement in practice
 - 1.1.3 The engagement spectrum today
 - 1.1.4 Traditional v.s. digital engagement
 - 1.1.5 Contributing to community development
- 1.2 Benefits and opportunities

Section 2: ORGANIZATIONAL READINESS

- 2.1 Risk management
 - 2.1.1 Common risk factors and misconceptions
 - 2.1.2 Municipality v.s. citizen perception of risk
 - 2.1.3 Risk assessment
- 2.2 Foundations of municipal citizen engagement
 - 2.2.1 Alberta's Municipal Government Act
 - 2.2.2 Privacy legislation
 - 2.2.3 Organizational commitment
 - 2.2.4 Citizen engagement framework
 - 2.2.5 Policy development
 - 2.2.6 Elected officials and citizen engagement policy
- 2.3 Municipal decision-making and citizen engagement
 - 2.3.1 Decision-making and the spectrum of engagement

SECTION 3: PLANNING FOR CITIZEN ENGAGEMENT

- 3.1 Defining the issue at hand and decision to be made
 - 3.2 Assessing expectations
 - 3.3 Setting desired outcomes
 - 3.4 Target participants
 - 3.4.1 Target participant perception audit
 - 3.4.2 Aligning the engagement issue and decision with target participants
 - 3.5 Selecting your level of engagement
 - 3.6 Refining your outcomes
 - 3.7 Techniques and tools to engage citizens
 - 3.7.1 In-person v.s. digital engagement
 - 3.7.2 Selecting your techniques and tools
 - 3.7.3 Important considerations for the use of digital engagement tools
-

- 3.8 Recruiting and retaining participants
 - 3.8.1 Overcoming barriers to citizen engagement participation
- 3.9 Communicating your citizen engagement project
 - 3.9.1 Communicating the decision-making process
 - 3.9.2 Key communication considerations
 - 3.9.3 Communication skills that contribute to effective citizen engagement
- 3.10 Timelines and resources
 - 3.10.1 Developing a project schedule
 - 3.10.2 Roles and responsibilities
 - 3.10.3 Finance and human resource requirements
- 3.11 Citizen engagement readiness checklist

SECTION 4: EVALUATING YOUR CITIZEN ENGAGEMENT EFFORTS

- 4.1 Setting performance measures
- 4.2 Data collection techniques
- 4.3 Analyzing your data
- 4.4 Reporting and sharing results

- APPENDICES:** Appendix A: Resource Guide
Appendix B: Glossary



1

Setting the stage

Citizen engagement is a broad term that encompasses action by elected officials and government organizations to account for the knowledge, experiences, views and values of the public in their decisions.

For municipalities to implement decisions, and particularly difficult decisions in response to complex challenges, they require citizens' consent and support. Unless citizens understand and are engaged in the decisions themselves then trust is easily lost (OECD, 2009).

As it stands, there is ongoing evidence from right within our communities to around the world that citizens are not content simply to engage with government through periodic elections. They want to influence decision-making, and there are a number of factors driving this:

- Perception of a growing disconnect between citizens and governments, echoed by low voter turnouts, declining confidence in public officials and increasing demands for accountability and transparency;
- A more educated public who believe their voices matter on issues that affect them;
- Advances in technology that are raising expectations for immediate access to reliable information and networking across groups, geographical boundaries and traditional government processes; and
- Government representation that does not reflect the gender and ethnic make-up of the population (Watling, 2007).

SECTION 1

Setting the stage

Many citizens feel discouraged by both real and perceived barriers to influencing public decisions and decision-makers. Among these barriers are highly-entrenched decision-making processes, expectations of the public and of elected officials themselves to demonstrate authority, and sceptical subject-matter experts who are unsure of the ability of citizens to grapple with complex issues. More systematic barriers include the cost of engagement as well as legalities, from the onus on municipalities under the *Municipal Government Act*, to multi-jurisdictional approaches to and responsibilities surrounding many large and complex policy issues.

Citizen engagement can be a powerful response to the public's interest in influencing decisions and engaging with government outside of election periods. However, it must be well designed, properly supported and resourced, and born from a genuine desire to engage citizens in a way that makes sense for the issue or decision at hand. Done right, citizen engagement can support quality democracy, the legitimacy of government, successful implementation of policy and a higher quality of life through the pursuit of desired social outcomes. On the other hand, poorly executed citizen engagement can lead to mistrust, poor decisions and discontent with government.



CITIZEN ENGAGEMENT VIGNETTE VILLAGE OF LONGVIEW

CITIZEN ENGAGEMENT THAT BUILDS COMMUNITY CONFIDENCE

In December 2013, the Village of Longview signed a precedent-setting water testing agreement with Legacy Oil & Gas Ltd. It was a decision driven by citizen engagement, and a critical step to ensure residents' confidence in their water supply.

"Longview has seen more than its fair share of oil and gas development," explains Mayor Cliff Ayrey, who sat in the role of Deputy Mayor in 2013. "However, hydraulic fracturing operations are a new challenge and our community needs to be 100 per cent confident that the chemicals injected into the ground do not impact our water supply."

Longview's village Council wanted to ensure that all residents were first and foremost informed about Longview's situation.

"Water is the last thing you want people to worry about," says Mayor Ayrey. "It was critical that people had the best information and all the information so we could be really clear about any residual concerns and how to address them."

The Village of Longview organized an open house event that attracted approximately 70 of its 311 residents. The open house provided a forum for Legacy Oil & Gas Ltd. to explain their operations, Alberta Environment to speak to water quality standards, and the Village of Longview to share its role in protecting residents' quality of life. It focused on providing information, including a number of presentations, and offered a question and answer session to ensure that participants received the information that they came seeking.

The open house was equally an opportunity to generate feedback from residents and get a clearer sense of what they needed to feel secure in the quality of their water. A combination of communiques directed to the Village and the open house pointed to the need for transparency and consistency in water testing arrangement. The Village elected to gain a clearer view of this input.

"As a Council, we needed to make a decision about how to quell water quality fears so we went back to our residents," describes Mayor Ayrey. "We consulted them by distributing a survey, which allowed for two responses per household, and sought input regarding people's level of satisfaction with current water testing procedures."

The Council sent out a concise and pointed two-question survey to get direct and explicit feedback. It found that approximately 85 per cent of its residents were satisfied with current water testing procedures. It knew that, with a resource as critical as water, the concerns among the remaining 15 per cent of residents were important to address.

In response, the Village of Longview approached Legacy Oil & Gas Ltd. The result was the precedent-setting agreement. It is a legal and binding protocol that guarantees frequent and consistent water quality testing by a third party, where the billing and results, in the name of transparency, are sent directly to the Village of Longview. The role of Legacy Oil & Gas Ltd. is to fund the testing, thereby offering its guarantee to the community to act in the best interest of its residents.

1.1

Municipal governance, citizen engagement and community development

Citizen engagement is rooted in democracy and parliamentary process. The complexity of our mass societies, those formed in the 20th century, have made direct citizen rule unrealistic. In Canada, the solution has been representative democracy - where citizens vote in elected representatives to make decisions in the public interest.

The challenge with representative democracy is that its most essential feature is the competition for leadership. This means that the quintessential role of citizens is to choose leaders to produce a government (Schumpeter, 1976: 269). The reality is that the decisions that governments make often require trade-offs of public resources. More than this, the legitimacy and sustainability of public policy, programs and services depend on their fit with public values (Ank, 2011). While elections serve to identify populist party programs that contain opinions on all types of issues, they rarely serve to reveal the preferences of voters on specific issues.

Citizen engagement can then, depending on the complexity of the issue at hand, act as a means for the government to share information, gather input from the public or work collectively to define and implement solutions. It offers elected representatives and the governments they form more frequent and meaningful ways to help shape public policy - particularly between elections.

1.1.1 A brief history of citizen engagement

In its earliest iteration, democracy was citizen engagement. Citizens assembled in Greek city states to affect community-oriented processes and decisions. Democracy emerged as a process of self-government that allowed citizens to affect and operate upon their environment directly and indirectly. In a direct fashion, citizens make decisions for themselves and in an indirect fashion they influence the decisions for communities.

Out of citizen engagement emerged a system of government and centralized decision-making. Both democracy and citizen engagement went through a transitional state in the 19th century. Mass societies evolved and with them complex economic, social and environmental questions. In reaction to the sheer size of communities and their complexity, representative democracy emerged.

GOVERNMENT V.S. GOVERNANCE

In the traditional sense **government** rules and controls rely on compliance. However, a state of **governance** means management and coordination that calls upon all citizens to play a part in moving their community forward.

Government:

- linear model
- hierarchy
- formal institutions and procedures
- representation of citizens through election
- domination through rules or compliance activities may be required to ensure universal acceptance of a decision

Governance:

- network model
 - multi-layer
 - evolving and ongoing processes
 - power is dispersed
 - acceptance of and support for decisions by all players arises out of wide participation in earlier debate
-

Representative democracy became a well-established institution in Western countries. It was designed to secure democracy as government of the people and for the people. It was established to, and in many ways still does, create democratic institutions around popularly elected government officials.

Over the last forty to fifty years, there have been new societal values emerging and new questions surrounding representational democracy. It has been asserted participatory and deliberative democracy – both proponents of greater citizen engagement – can enrich and renew Canada's long-standing tradition of representational democracy. More than this, it is becoming clear that we are in the midst of a second transitional state - one from government to governance - that is being driven by changes in expectations that surround citizen engagement.

Today's citizens benefit from higher levels of education and greater access to modes of participation. While the scope of citizen engagement is highly variable - from gaining information to consultation to full delegation of decision powers - it is clear that citizens' expectations regarding their level of participation in community decisions is changing. These changes show no indication of threatening Canada's commitment to representational democracy, but does mean that our political institutions are being challenged to be effective and, in some cases, innovative in their engagement activities.

1.1.2 Citizen engagement in practice

As representational democracy has become institutionalized in Canada, citizen engagement has declined. The most overt evidence of this decline is voter turnout. Some staunch interpretations of representative

democracy state that the role of the public is to form the government. Criticism of this view is that voting is an infrequent, non-deliberative activity that, while having a high-impact and highly visible result, creates significant distance between governments and citizens.

Along with representational democracy has emerged a spectrum of methods to engage the public. While each of the methods have merits, some have longer-standing history in Canadian democracy and have matured at a faster rate than others.

In Canadian democracy, public communication and public consultation have a high level of maturity.

Public communication is a passive, one-way flow of information to citizens. It is achieved through tools like websites, advertising, reports, and brochures. It is considered part of citizen engagement because it is necessary for citizens to be informed in order to be involved in action.

If public communication is a call from a government to its people then **public consultation** is the response. In the call-response dynamic, public consultation is a one-way flow of information from the public to its government. Governments use methods such as public hearings, opinion polls, referenda, and open houses to invite input. Citizens, as individuals, are presented the opportunity to express their opinions, provide input, share ideas and represent their personal or their organization's interests toward the issue or decision at hand.

As part of Canada's transition from government to governance, or the view that representative democracy can be enriched by investing in effective citizen engagement, new and more participatory forms of engagement are emerging. These activities can be described as **public deliberation**, and they allow for

interaction among the citizens and between citizens and government. Public deliberation, regardless of method, moves the interactions of a government and its people beyond conversation into an interaction where the emphasis is on values, imagining and seeking to discover common ground for solutions. Public deliberation methods can include citizens' panels, consensus conferences, and deliberative polls. These methods can lead to varying levels of commitment on how to move forward as well as the implementation of decisions within municipalities.

In Alberta the purpose of municipal government is to:

- provide good government;
- provide services, facilities or other things that are necessary or desirable; and
- develop and maintain safe and viable communities (Alberta Municipal Affairs, 2015).

The *Municipal Government Act* describes the role of elected officials, who are in place to look after the interests of the entire municipality. This means that elected officials, as tough as it is, must base any decision on what is best for the entire municipality.

For municipalities, there is a deliberate vagueness to their roles, as outlined within the *Municipal Government Act*.

It is up to the municipalities to conceptualize what "good" government means to their residents, which services, facilities and other things are deemed "necessary or desirable" and what constitutes a "safe and viable" community.

The reality is that the work of municipalities can be fraught with tension between values. Citizen engagement is key to managing through these tensions.

CLARIFYING CITIZEN ENGAGEMENT

Citizen Engagement*

- Involves citizens (individuals, not representatives) in policy or program development, from agenda setting and planning to decision-making, implementation and review
- Requires two-way communication regarding policy or program change (interactive and iterative) between government and citizens, among citizens, and among citizens and community groups
- Aims to share decision-making power and responsibility for those decisions
- Includes processes through which citizens come to an opinion which is informed and responsible
- Generates innovative ideas and active participation
- Contributes to collective problem solving and prioritization (deliberation)
- Requires that information and process be transparent
- Depends on mutual respect between all participants

* NOTE: citizen engagement initiatives may embody some but not all of these characteristics.

NOT Citizen Engagement

- Engages exclusively the leaders of stakeholder groups or representatives
- Constitutes participation in a program where no decision-making power is granted regarding the shape or course of the policy or program
- Involves participants only in last phase of policy or program development
- Seeks approval for a pre-determined choice of alternatives
- Intends to fulfill "public consultation obligations" without a genuine interest in infusing the decision with the opinions sought
- Includes public opinion polls and many focus group exercises

Source: Sheedy, 2008

1.1.3 The engagement spectrum today

According to the International Association of Public Participation (IAP2) (2006), engagement activities are classified and understood relative to the level of impact on citizens. In IAP2's Spectrum of Public Participation, the association takes the perspective of the host organization (e.g. the municipality) that is seeking to engage an audience on a decision.

The spectrum is driven by the view that the host organization has accountability to implement a decision and citizens can have varying stakes in the outcome.

The lowest level of engagement **informs** citizens, ensuring they have balanced and objective information to help them understand the problem, alternatives, opportunities and solutions. Regardless of how far the host organization moves along the spectrum, informing citizens is always a fundamental aspect of affective engagement.

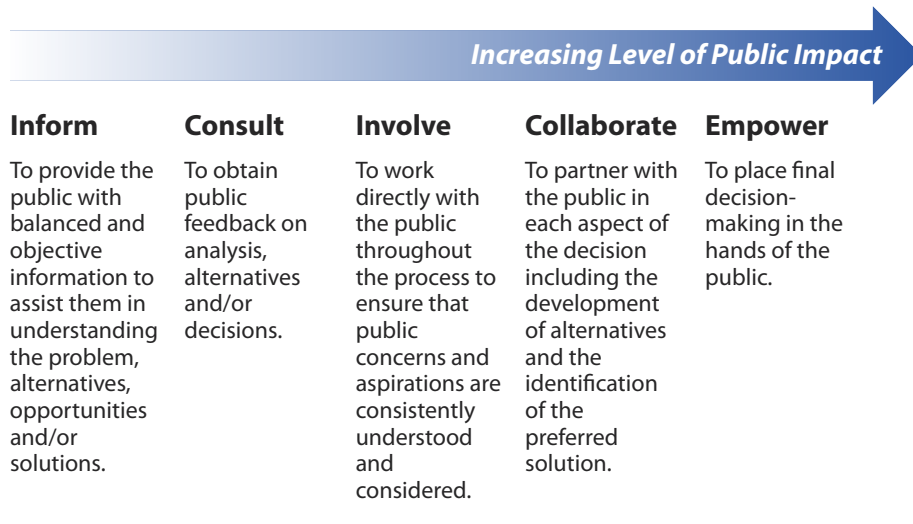
The second tier of engagement is **consulting**, giving the host organization an opportunity to obtain citizen feedback on analysis, alternatives and/or decisions.

It is necessary for citizens to feel informed in order to effectively participate in consultation activities.

The third, fourth and fifth tiers of engagement move into a range of activities that relate to public deliberation. These tiers vary according to how much decision-making authority is granted to the citizens engaged in the process. In the third tier, **involving** citizens, the host organization works with participants to ensure their concerns and aspirations are heard, understood and considered as part of a decision. The fourth tier, **collaborating** with citizens extends the relationship between the host organization and the citizen into a partnership. It acknowledges that both the organization and citizens have a stake in the final outcomes and strives for deliberation to identify alternatives and participatory decision-making to set priorities and identify a preferred solution. The final tier, **empowering**, acknowledges that citizens have a high stake in the final outcome and it puts the deliberation and decision-making in their hands.

IAP2 SPECTRUM OF PUBLIC PARTICIPATION

Public Participation Goal



Source: International Association of Public Participation

1.1.4 Traditional v.s. digital engagement

Part of changing citizen expectations surrounding opportunities to engage with their government representatives can be understood through advances in communication technology. One of the most important advances in communication technology is public deliberation, where citizens of all backgrounds and experiences can wade into conversations and deliberation on nearly any topic.

Over the past 15 years, online communication has helped transition our society from the exclusive use of broadcast (i.e. television, radio, newspaper and other mediums that allow one person to reach a mass audience) and one-on-one communication mediums (i.e. email, instant messaging) to many-to-many communication mediums (i.e. online forums and social media platforms that allow people to both observe the contributions of others and share their contributions within a mass community of users and participants).



CITIZEN ENGAGEMENT VIGNETTE CITY OF CALGARY

WHAT DO YOU DO WHEN VIRTUALLY EVERY CITIZEN IS A TARGET PARTICIPANT?

Toward the end of 2013, Calgary City Council identified stakeholder input as key to developing its new four-year business plan and budget.

Members of Council felt citizen input would greatly enhance Council priorities, departmental business plans, budgets and, ultimately, the services delivered to Calgarians.

In response to Council's request, the City chose to consult citizens for input on the following decision:

Focusing on the next four years, how do we establish future direction and find the right balance between investing in quality public service and keeping tax rates affordable?

One of the big challenges - with a population of more than one million people - is that almost everyone, regardless of their profile, was a stakeholder with the potential to offer valuable and valid input. It was clear that no single engagement tactic could offer the opportunities for citizen input needed to support Council's decision-making.

The City made the strategic decision to implement a multi-stream approach that included Reflection and Synthesis, Representative Engagement, Inclusive Engagement, and Internal Engagement. "The combination of the four streams of engagement provided opportunities for

feedback from a broad range of citizens and stakeholders", said Noreen Rude, Manager of Engagement & Communication Partner Services, "It was the most comprehensive approach we have had for a project of this kind."

Reflection and Synthesis involved a review of citizen engagement and research activities conducted across the corporation between 2010 and 2013.

Representative Engagement employed qualitative research methods. Participants in this stream were recruited to ensure representation of harder-to-reach populations and the broad diversity of perspectives of Calgarians.

Inclusive engagement was the core effort of the engagement strategy, which sought to reach, educate, and solicit feedback from as many Calgarians as possible on spending priorities and the City's long-term priority areas. The process included one community event in each of Calgary's 14 wards.

Internal Engagement leveraged City staff and civic partners' specialized knowledge to generate ideas of ways to collaborate for efficiency and improved community success. More than this, the City made the decision to offer multiple channels for input within the inclusive engagement stream.

Online engagement included a discussion forum, a priority setting tool, and a budget simulation tool which worked hand-in-hand with community opportunities. The face-to-face events included attendance at community events and gathering places to reach a wide diversity of citizens in their own

neighbourhoods, at libraries, shopping centres, parks, ethno-culture events and other community hubs - going to where the people were versus asking them to attend a City-led event.

The results were worth it. The City of Calgary found that offering complementary digital and online engagement opportunities helped mitigate the weakness of any one tool. The online simulation tools allowed citizens to participate without requiring any specialized knowledge about the topic at hand.

The City also felt that stepping outside the more traditional route of online surveys created some highly positive interactions.

The tools chosen were able to integrate the needs for background and contextual information, let citizens explore and learn about the City, and then provide input for Council to consider. Comments back from citizens indicated that the tools greatly simplified the engagement experience while making it efficient and enjoyable as well.

Members of City Council were excited about the unique and comprehensive process and tools and took every opportunity to promote the engagement offerings through their community-based networks. The results of the engagement activities were reported by each ward then aggregated for the City as a whole.

"You would be hard pressed to find a government with a population larger than ours that would put in the time to achieve engagement numbers that big," said Mayor Naheed Nenshi.

Outside of the technology itself there have been advances in online conventions, such as the use of classifiers (also known as tags or hashtags) that congregate citizens around topics of mutual interest.

The importance of these advancements in communication technology is that they have changed citizens' expectations around how and even how quickly they are informed by their governments and are able to share information with decision-makers. In addition to this, public deliberation is, in many instances, occurring with or without government participation. Concerned citizens now have platforms to come together around shared issues, concerns and opportunities, as well as to form critical mass to bring their concerns to decision-makers. The advances in the platforms themselves also mean that governments and citizens alike can move deliberation into an online environment. These spaces, while still emergent in both technology and practices, are becoming robust enough to support even the most interactive, complex and large-scale citizen engagement projects.

1.1.5 Contributing to community development

Citizen engagement is at the heart of community spirit and, accordingly, community development. Community development is a process where community members come together to take collective action and generate solutions to common problems. It is focused on finding effective economic, social, environmental and cultural solutions to enhance citizen wellbeing.

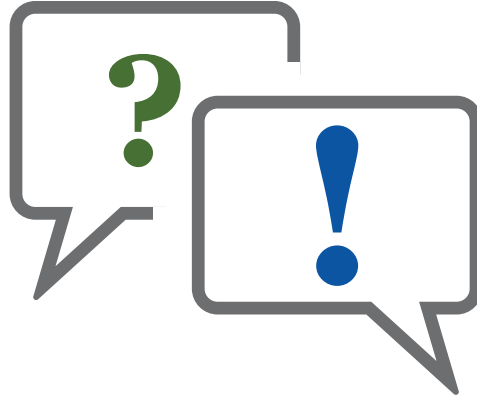
Effective citizen engagement is the foundation for community development, and particularly collective action that is taken and/or implemented at a grassroots level. For municipalities, community

development work is most effective when it aligns with their strategic outlook and vision for the future. Accordingly, it is important for municipalities to either lead, act as a catalyst for, or support community development and, at minimum, recognize how to effectively engage with citizens invested in improving quality of life.

Regardless of the scope of community development activities, it is most effective when it is:

- a long-term endeavour;
- well-planned;
- inclusive and equitable;
- holistic and integrated into the bigger vision for the community;
- initiated and supported by community members;
- of benefit to the community; and
- grounded in experience that leads to best practices.

Of particular importance to municipalities as they consider citizen engagement is that community development is generally initiated and supported by community members. This means that municipalities that choose to show leadership, act as a catalyst for, or support community development should acknowledge that, on the Spectrum of Public Participation (*See 1.1.3 The engagement spectrum today*) they understand and are in support of public deliberation. This is because community development work assumes that the impact of decisions on citizens is high and that they want to either contribute to or demonstrate ownership of decision-making and, often, implementation of the work. In this sense, municipalities become a contributor to or partner in enhancing the well-being of a community.



PRINCIPLES OF CITIZEN ENGAGEMENT

The Institute for Local Government's Public Engagement (2014) program has developed the following principles to serve as helpful indicators of effective and ethical citizen engagement practices by local government. These principles may also help guide municipalities in the design, planning, implementation and evaluation of citizen engagement projects.

Inclusive Planning

The design and planning of a citizen engagement plan includes input from appropriate municipal officials as well as targeted citizen participants.

Transparency

There is clarity and transparency about citizen engagement project sponsorship, purpose, design, and how decision-makers will use the results.

Authentic Intent

A primary purpose of citizen engagement is to generate public views and ideas to help shape municipal government action or policy, rather than persuade citizens to accept a decision that has already been made.

Breadth of Participation

The citizen engagement project includes people and viewpoints that are broadly reflective of the municipality's population of affected citizens.

Informed Participation

Participants in the citizen engagement project have information and/or access to expertise consistent with the issue or decision at hand.

Accessible Participation

Citizen engagement processes are broadly accessible in terms of location, time, and language, and support the engagement of citizens with disabilities.

Appropriate Process

The citizen engagement project utilizes one or more techniques and/or tools that are responsive to the needs of targeted participants, and encourages full, authentic, effective and equitable participation consistent with the purpose of engagement. This may include relationships with existing community partners, techniques and tools (i.e. community committees, community association meetings).

Authentic Use of Information Received

The ideas, preferences, and/or recommendations contributed by citizens are documented and seriously considered by decision-makers.

Feedback to Participants

Municipal officials communicate ultimate decisions back to target participants and the broader public, with a description of how the input was considered and used.

Evaluation

The municipality and participants evaluate each citizen engagement project with the collected feedback and learnings shared broadly and applied to future engagement efforts.

*Adapted from Institute for Local Government's
Public Engagement Program (2014)*

IAP2 CORE VALUES FOR THE PRACTICE OF PUBLIC PARTICIPATION©

1. Public participation is based on the belief that those who are affected by a decision have a right to be involved in the decision-making process.
2. Public participation includes the promise that the public's contribution will influence the decision.
3. Public participation promotes sustainable decisions by recognizing and communicating the needs and interests of all participants, including decision-makers.
4. Public participation seeks out and facilitates the involvement of those potentially affected by or interested in a decision.
5. Public participation seeks input from participants in designing how they participate.
6. Public participation provides participants with the information they need to participate in a meaningful way.
7. Public participation communicates to participants how their input affected the decision.



1.2

Benefits and opportunities

When it comes to navigating citizen engagement, there are a lot of choices to be made. In the end, the most effective engagement will depend greatly on the issue or decision at hand and the potential impact on citizens. However, even before this, it is important to understand the benefits that citizen engagement can provide.

Information, Perspective and Ideas

All aspects of citizen engagement, regardless of where it sits along the Spectrum of Public Participation (See 1.1.3 *The engagement spectrum today*) can contribute to communication that shares information, perspective and ideas. On the front end of the spectrum, public communication allows a municipality to share accurate and timely knowledge and insight on conditions (i.e. road closures, changes to recreation schedules, changes in personnel, updates to bylaws), concerns (i.e. changes to funding models, ending homelessness, annexation), values (i.e. economic, social and environmental trade-offs), and priorities (i.e. capital investments, recreation and culture, community development, growth initiatives, accessible housing). Public consultation allows citizens to contribute their feelings, experience and evidence-based information back to municipalities in advance of a decision being made.

Further along the spectrum, citizens and municipalities work more closely together to not only share information, perspectives and ideas but deliberate their merits for the most desirable solution. The changes along the spectrum relate to where the decision-making authority lies.

Working Relationships

Effective citizen engagement is, regardless of the nature of the activity, an investment in social capital. Done right, citizen engagement can build knowledge bases, trust and, ultimately, a commitment to support current and future decisions.

Balanced and Legitimate Decisions

By engaging citizens, municipalities are able to generate a diverse cross-section of views and options for addressing issues or capitalizing on opportunities. They can get insight into points of contention as well as those that generate hope and excitement. They identify potential risks and barriers to success before they've invested in an initiative. They can achieve results that respect the values, experiences, rights and needs of the citizens they serve.

Well-supported Decisions

Citizen engagement can also contribute to broad support for and vested interest in decisions made and work undertaken by municipalities. It can identify and confirm community priorities. It can ensure that work is undertaken in a way that addresses citizen concerns, meets expectations and delivers on priorities. It can encourage citizens to stand with their municipalities on difficult decisions and back community investments.



2

Organizational readiness

While proponents of participatory and deliberative democracy stand firmly behind the benefits of citizen engagement in municipal decision-making, the practice doesn't come without risks and challenges. Before you set out to undertake citizen engagement, it's important to understand the risks and challenges associated with the practice and what you can do to mitigate these risks. This includes gaining a clear understanding of your municipality's commitment to effective and meaningful engagement as well as its supporting framework and policy tools.

SECTION 2

Organization readiness



2.1 Risk management

Risk management refers to the effects of uncertainty that could hinder outcomes of a citizen engagement project. The *Municipal Government Act* and *Freedom of Information and Privacy Protection Act* are legislation standards designed to guide municipal risk related to citizen engagement. Framework and policy development are other tools available to help municipalities manage risk.

2.1.1 Common risk factors and misconceptions

Municipalities that undertake citizen engagement face, and can be deterred by, some common risk factors.

Consider the following and think about their relevance to your municipality:

- lack of internal commitment to engagement;
- ad hoc processes;
- lack of clarity on the decision to be made, issue to be solved or opportunity to be met;
- lack of communication about the engagement;
- low rate of participation or lack of adequate citizen representation;
- lack of clarity on how input will be used; and
- limited opportunities to participation (e.g. only digital or only during the day time hours).

Having a high level of awareness of what your municipality associates as risks to effective citizen engagement is the first step to managing them.

In addition to legitimate risks associated with citizen engagement, there are a number of commonly perceived risks that may be considered misconceptions.

These include:

Engaging citizens in decision-making is an example of decision-makers abdicating responsibility.

By employing citizen engagement activities, a municipality does not abdicate responsibility. Rather, after thoughtful consideration, a plan for productive engagement is developed that:

- retains appropriate responsibilities;
- supports the municipality's vision and mission and the engagement project's purpose;
- demonstrates the municipality's commitment to serving its constituents; and
- provides avenues for productive engagement by citizens.

Complex, challenging, technical and/or specialized decisions must be made by subject-matter experts and trained professionals.

Citizen engagement recognizes that subject matter experts contribute essential knowledge and information to decision-making. However, it also recognizes that complex, challenging, technical and/or specialized decisions often involve trade-offs in what can be considered public values.

The reality is that effective, sustainable decisions tend to ensure that local knowledge and perspectives and sensitivity to the social context of the community are also part of the decision-making equation.

Citizens elect members of the public to act on their behalf. It's the mandate of elected officials to speak and act for the public.

Quality citizen engagement helps elected officials understand and respond to their constituents' hopes, dreams, issues and concerns. Solely relying upon elected officials (who have limited terms of service) may fail to result in sustainable decisions for the municipality.

Citizen engagement takes a substantial investment of time and money.

The cost and time required for citizen engagement varies widely based upon multiple factors, including the:

- degree of existing and potential controversy;
- risk potential for the municipality;
- history of participation within the municipality and community;
- complexity of the issues;
- resources available;
- participation techniques and tools recommended; and
- experience and skill of the citizen engagement project manager.

It won't make everyone happy.

Citizen engagement isn't designed to make everyone happy. It is designed to account for the level of citizen involvement that will lead to the best and most supported decision for the community. In highly complex or contentious scenarios, citizen engagement that includes deliberation can point to new possibilities or opportunities not previously considered. The opportunities on the table can be explored in full and municipalities or citizens, depending on who is responsible for the decision, can provide a clear statement as to what decision is made and why it is the appropriate decision. Explaining why a decision is made is a critical step to helping everyone, both people who support and do not support a decision, come to terms with it.

2.1.2 Municipality v.s. citizen perception of risk

Citizens also perceive risks when they interact with your municipality. In a logical sense, risk is the chance or probability of a negative event occurring. Risk also has two friends - *hazard*, the cause of a negative event, and *outrage*, a citizen's emotional response to the hazard. Citizens are not always in tune with risk itself, or even hazards, but rather, outrage. When citizens experience outrage, it is important to know that their emotional response may come from a number of places and not necessarily from a need for more facts or assurances from a technical or subject matter expert. In fact, it is safe to say that facts are rarely capable of changing the way that outraged citizens perceive risk.

In these circumstances, it becomes important to understand outrage and apply effective communication in its presence.

Outrage is most often apparent when citizens feel:

- fear;
- disagreement over values or priorities;
- anger about approach and attitude; and
- actual impacts.



As a municipality, it is important to understand that there are indicators that contribute to outrage. Some of these include:

- using the "decide, announce and defend method", which demonstrates little to no awareness of the interests, values, and concerns of citizens;
- failing to recognize that for many people and groups health, safety, and environmental risks may reflect deeper social, political, or economic concerns;
- failing to provide adequate training for subject matter experts and spokespersons in risk-communication skills;
- using overly complex or technical language in communicating information about risks to citizens;
- communicating verbally and nonverbally in ways that elicit mistrust and ill will; and
- insisting on making risk-management decisions solely on the basis of risk calculations.

It is also important to understand that there are risk communication practices to help overcome the potential for outrage. Some of these include:

- minimize risks to health, safety, and the environment and communicate about what is accomplished;
- develop linkages and partnerships with credible organizations;
- endorse risk messages by trustworthy third parties;
- adopt and live up to engagement values and principles;
- commit to active listening and two-way communication;

- consult with citizens about the assessment, management, and communication of risks;
- respect differing values and world-views;
- apply techniques and tools that build consensus among citizens; and
- commit to excellence in risk communication.

If you are concerned about developing relationships with citizens, then consider that it can be good practice to:

- admit to and apologize for mistakes, including past mistakes;
- work with interested groups before, during and after engagement projects;
- look for opportunities to have one-on-one dialogue;
- focus on the situation, issue or behaviour, and not on the individual;
- support the self-confidence and self-esteem of others;
- build and maintain constructive relationships;
- lead by example;
- show an interest in citizens and their concerns;
- seek to meet citizen needs in timing, place and format of engagement activities;
- avoid defensive mindsets, language, and behaviours;
- be human;
- be sensitive to emotions; and
- prepare ahead of time, know citizen perceptions and expectations, and have information ready.

Adapted from Covello, McCallum & Pavlova, 1989

2.1.3 Risk assessment

Perceived risk to a municipality increases as citizens are granted greater influence in the decision-making process. This is also the reason that public communication (informing) and public consultation (consulting) are considered to be more mature methods of citizen engagement than public deliberation (involving, collaborating and empowering).

It is, however, unfair to assume that public communication and public consultation automatically offer a municipality greater control, a sure outcome and, accordingly, less risk. Depending on the type of issue or decision at hand, it may in fact be higher risk for a municipality to minimize citizen involvement in an issue. This is particularly true given the ongoing evidence provided within our communities and around the world that citizens' expectations of municipal government are changing and they want more frequent and meaningful opportunities to influence decision-making (See Section One).

Therefore the appropriate questions for a municipality to assess the degree of risk associated with citizen engagement are:

- What do we need from citizens and why?
- What are our strengths and weaknesses as a municipality?
- What are the opportunities and threats that citizen engagement poses around our need?
- What is the likelihood that we will deliver insufficient or poor quality citizen engagement and why?

Use the *Understanding Risk Worksheet* in the Resource Section to guide your municipal risk assessment.

One effective approach for municipalities to not only assess the cause of risk but to also identify effective mitigation techniques is a Bow Tie Risk Assessment.

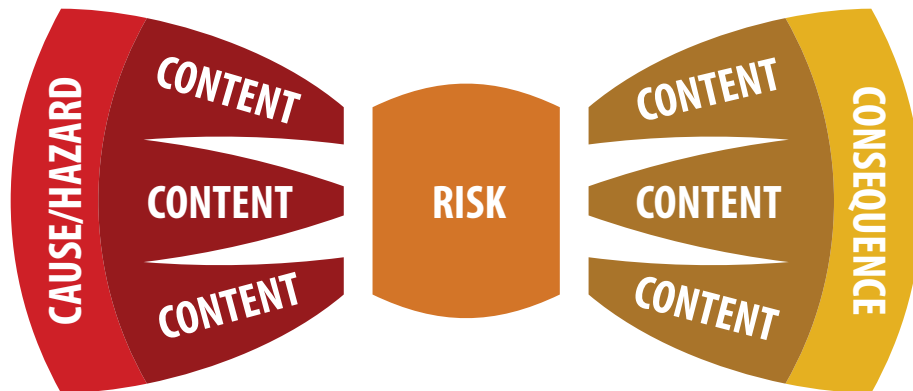


A **Bow Tie Risk Assessment** (a visual is shown in Figure 1 below; International Standard, 2009) is a simple visual way to describe and analyze pathways of risk, extending from causes to consequences. However, the focus of a Bowtie Risk Assessment is neither the causes or the consequences but the barriers between the causes and the risks and the consequences and the risk.

To conduct a Bow Tie Risk Assessment, a top event (the risk) is written down in the centre of a whiteboard or sheet of paper. The causes associated with the risk (the hazards) are described on the left side of the top event and the consequences (the impact of loss of control) are described on the right side of the top event.

With these in place, it is now time to focus on preventing or mitigating the cause of or consequence to the top event. Consider the type of actions, influences or activities that could mitigate or eliminate the potential of your list of hazards with the potential to impact your engagement project. On the other side, consider the type of actions, influences or activities that could potentially mitigate or eliminate the possibility that the engagement project would have the consequences that you listed out.

Figure 1:
Bow Tie Risk
Assessment



2.2

Foundations of municipal citizen engagement

2.2.1 Alberta's Municipal Government Act

In Alberta, the *Municipal Government Act* defines the *Purposes, Powers and Capacity of Municipalities*. It also outlines the *Duties, Titles and Oaths of Councillors*. This goes to say that, in some instances, municipalities are legally obligated to undertake citizen engagement. These obligations extend from the most formal aspects of engaging the public to form government (e.g. elections) to communicating decisions to allowing citizens to petition their elected representatives to take specific actions.

Of course, the law is in place to protect public interests and not, as the case often is with municipal work, to advance opportunities and enhance quality of life within communities. For this reason, citizen engagement activities often extend beyond the requirements outlined in the *Municipal Government Act*. It is outside the requirements of the *Act* that citizen engagement can seem overwhelmingly complex as the opportunities are boundless. (Section Three addresses planning for effective citizen engagement.)

The *Municipal Government Act* establishes a legal requirement for Council and Council Committees to conduct business in public and to ensure citizens are notified of certain kinds of decisions (Alberta Municipal Affairs, 2011).

The *Act* establishes a framework for local government that provides municipal councils with the powers necessary to provide for the needs of their community, balanced by Councils' accountability to the citizens who elect them.

With respect to Council's commitments under the *Act*, there are specific requirements in place to inform residents of decisions affecting them and opportunities available to them. Examples of this include the requirement to advertise new, updated or revised bylaws, Council meetings with the public, and public auctions or sales. Municipalities are expected, under law, to adhere to the specific advertising requirements outlined in the *Act*. In addition, inspections ordered by the Minister of Municipal Affairs must be, when completed, presented to citizens of the specific municipality at a public meeting.

With respect to citizen opportunities, the *Act* requires municipalities to ensure citizens can attend council meetings, petition council to take actions, and petition the Minister of Municipal Affairs to take action.

Council Meetings

Alberta's *Municipal Government Act* prescribes that everyone has a right to be present at Council meetings or Council Committee meetings conducted in public. In certain circumstances protected by the *Freedom of Information and Protection of Privacy Act*, Council may exclude the public for all or part of Council or Council Committee meetings. These are often referred to as in-camera discussions.

Petition Council

Alberta's *Municipal Government Act* prescribes that electors of a municipality may petition Council to hold a public meeting, conduct a vote on an advertised bylaw or resolution, or petition for local improvements.

A petition by electors to Council is a formal process authorized under the Act (See section 219 on page 120 of the *Municipal Government Act*).

Petition the Minister of Municipal Affairs

Alberta's *Municipal Government Act* prescribes that electors of a municipality may petition the Minister of Municipal Affairs to form a municipality, undertake a viability study, order an inquiry into the affairs of a municipality, etc.

A petition by electors to the Minister of Municipal Affairs is a formal process authorized under the Act (See section 219 on page 120 of the *Municipal Government Act*).

NOTE: Upcoming changes to the *Municipal Government Act* that have not yet come into effect alter some requirements for municipalities to conduct citizen engagement activities. Soon the Act will require all municipalities to adopt a public participation policy and there will be changes to advertisement and notification requirements. For further information visit the *Municipal Government Act Review website*.

MGA REQUIREMENTS AT A GLANCE

Section 197	Councils and Council committees must conduct meetings in public, unless section 2 or 2.1 applies.
Section 227	If Council calls a meeting with the public, notice of it must be advertised and everyone is entitled to attend.
Section 230	Describes when Council is required to hold a public hearing before second reading of the bylaw, or before Council votes on the resolution.
Section 251 (3)	A borrowing bylaw must be advertised.
Section 606	Describes the requirements for public advertising. Notice must be advertised at least once a week for two consecutive weeks or delivered to every residence in the area affected. Describes what a notice must contain.
Section 636	Describes notification and public input requirements related to preparation of a statutory plan.
Section 640 (2) (d)	Land use bylaw must provide for how and to whom notice of the issuance of a development permit is given.
Section 692	Council must hold a public hearing (section 230) and give notice (section 606) before giving second reading to adopt or amend a land use bylaw or statutory plan, i.e. <ul style="list-style-type: none">• intermunicipal development plan,• municipal development plan,• area structure plan, or• area redevelopment plan.

Source: Alberta Municipal Government Act

This list is not exhaustive. It considers the engagement responsibilities of municipalities, without making reference to all of the obligations pertaining to communication and hosting public hearings.

Other Opportunities for Citizens

In addition to the activities prescribed under the *Municipal Government Act*, Municipal Affairs encourages citizens to get involved with municipal government by:

- Sitting on a municipal agency, board, committee or commission;
- Making a presentation to Council;
- Participating in town halls, open houses, etc;
- Writing a letter, email or making a phone call to administration and/or Council; and
- Being a community volunteer.

Source: Alberta Municipal Affairs, n.d.

2.2.2 Privacy legislation

In Alberta, municipalities that choose to undertake citizen engagement are also required to protect citizen's personal information under the *Freedom of Information and Protection of Privacy Act*. Citizen engagement activities often involve collecting personal information from participants and, as a municipality, there is a duty to protect your citizens by, as a bottom line, adhering to privacy legislation.

Depending on the engagement technique or tool you wish to use, a *Privacy Impact Assessment (PIA)* may be required. A PIA is the foundation tool/process designed to ensure compliance with government's privacy protection responsibilities. PIAs are submitted to the Office of Information and Privacy Commissioner of Alberta for review and approval.

Working within privacy legislation is a matter of clearly stating a municipality's security and data retention policies. Be clear about actions taken to protect confidential information and differentiate between soliciting input (a record to be maintained) and responding to public inquiries (no record required). When in doubt, consult your municipality's privacy specialist or the Office of Information and Privacy Commissioner of Alberta. It can also be helpful to become thoroughly acquainted with the *Freedom of Information and Privacy Protection Act*.



While the *Municipal Government Act* is highly prescriptive of its communication, and specifically advertising and notification, requirements, there is benefit to supplementing these activities. Consider how your target participants access information and make use of these tools, including email distributions, web pages, social media platforms, posters and placards in public spaces, public service announcements, and presentations from municipal representatives.



Source: <https://patriciastec.files.wordpress.com/2013/07/crazy-dude-cartoon.jpg>

2.2.3 Organizational commitment

Internal harmony and accord, at least in terms of the officials within a municipality agreeing to the need for citizen engagement, are critical to the success of your engagement project. Citizen engagement projects cannot be undertaken without a team effort and that means everyone not only knowing how they fit into the work but wanting to do their part and more.

When it comes to organizations, there is an age-old adage that says:

If people only did what was required of them in their job descriptions then the work of the organization would grind to a full stop.

The same can be said for municipalities in their work to deliver citizen engagement opportunities. The more committed that people throughout the municipality are to the work, the more likely it is that they will work together to fill in the gaps and strive for success.

There are a number of considerations that can help a municipality take steps to achieve internal commitment from everyone with a role in influencing, supporting or leading citizen engagement work:

- Are there different decision-makers at different points in the engagement project?
- What are decision-makers' expectations for the project?
- What have been the decision-makers' previous experiences with citizen engagement projects?
- How effective is the decision-maker with citizens?
- Are there different viewpoints regarding citizen engagement in general and engagement on this issue or decision?

- What are the root causes of these differences?
- How does the municipality define the decision to be made?
- Who needs to be involved in the engagement?
- What is the municipality's previous experience with this group of target participants?

Adapted from International Association for Public Participation, ©2006

2.2.4 Citizen engagement framework

One of the most substantial barriers to effective citizen engagement is building support for it at all levels. In considering the Spectrum of Public Participation (See 1.1.3 *The engagement spectrum today*), it is often suggested that risk to the municipality increases as citizens are granted greater influence in the decision-making process. Taking this viewpoint, it is low risk to inform the public of a municipality's decisions but high-risk to empower citizens to make decisions, particularly when implementation of a decision falls to the municipality.

With this mindset, it can often feel safe to inform citizens or even consult with citizens and less safe to engage in more deliberative activities. The reality is that while it might feel safe, avoiding deliberative spaces out of fear can hinder the potential of a municipality and its project. **The appropriate level of citizen engagement is dependent on the potential impact of the decisions on the public.**

With a citizen engagement framework, both elected officials and administration can feel confident that they are clear on the role of citizen engagement within the municipality and how to approach it so that it aligns with the values, practices and procedures, and strategic outlook of the municipality.

Some of the reasons to invest in a municipal citizen engagement framework include:

- It guides and strengthens understanding of the role of citizen engagement within your municipality;
- It encourages consistent good practice in the design, implementation, planning, monitoring, evaluation, and reporting of citizen engagement efforts undertaken by your municipality;
- It accounts for the key elements of your engagement planning, implementation and evaluation;
- It can mitigate risk related to citizen engagement efforts;
- It provides your Council, Boards, employees, interns, volunteers, independent consultants, members, partners, and funders with a framework for action that supports them with the job they need to do;
- It fosters efficiency by providing an outline that can be applied to many engagement projects;
- It enforces good citizen engagement practices; and
- It can be a tool for citizen engagement quality improvements.

Adapted from Bullen, 2004

The establishment of a citizen engagement framework for the municipality's citizen engagement work provides clarity of when, how and why the municipality will engage with its citizens. The framework should acknowledge citizen engagement activities mandated by the Government of Alberta in the *Municipal Government Act* while also describing activities beyond the legislative requirements. The framework should demonstrate the ways in which municipal engagement principles and values will be demonstrated. Clarifying the delivery of citizen engagement in a framework ensures that any plan developed and implemented by administration and, where relevant, external consultants are consistent and meet the municipality's needs.

Key components of a citizen framework include:

- Vision statement that describes the municipality's desired outcome for their citizen engagement work;
- Guiding principles for engaging citizens;
- Spectrum of engagement (can be customized to reflect your municipality's needs);
- Description of engagement planning and implementation components (i.e. issue or decision identification, legislative requirements, target participants, level of engagement selection, communication strategies, techniques and tools, required resources); and
- Evaluation process requirements (i.e. how you will monitor, evaluate and report back to citizens).



2.2.5 Policy development

Policies are essentially the bottom line for effective, meaningful and ethical citizen engagement. They set the boundaries to help a municipality move forward its engagement practices – particularly when new citizen expectations and technology are stretching conventional approaches to engagement.

It is important for municipalities to approach citizen engagement intentionally and constructively. By adopting a citizen engagement policy, both elected officials and administration can feel confident that they understand their municipality's view on the value of citizen engagement and how it can ignite, enhance or supplement the core work of the municipality.

By investing in a citizen engagement policy, municipalities can:

- Ensure organizational values and beliefs are reflected in citizen engagement projects;
- Establish the guidelines or ground rules of your municipality's engagement work;
- Articulate the principles that guide your actions to promote transformational citizen engagement; and
- Clarify the roles and responsibilities for citizen engagement work being done in your municipality.

Adapted from Rural Communities Impacting Policy, 2005

There are eight building blocks that, given due consideration as part of an administrative citizen engagement policy, can go a long way to encouraging and empowering administration to engage in ways that are helpful, build relationships and, in turn, advance and help to achieve municipal goals.

Adapted from Bullen, 2004 and Schalk, 2014

1. MUNICIPAL COMMITMENT STATEMENT TO CITIZEN ENGAGEMENT

A commitment statement to citizen engagement provides a transparent means of sharing the municipality's philosophy on citizen engagement.

The statement should include:

- The need(s) the municipality is working to satisfy;
- The intended benefactor(s) of the municipality's engagement projects; and
- How the municipality's engagement work will support its long-term goals.

2. REASON FOR A CITIZEN ENGAGEMENT POLICY

A description of what a citizen engagement policy seeks to address and the intent of the policy.

The reasons for a policy might include decisions informed by citizen input and improving the quality of decisions. It might emphasize building relationships with citizens that the municipality services. It could focus on generating public knowledge to support a long-term vision or increasing the role of citizen input in municipal government. The specific reasons will be a matter of choice by your municipality.

3. CITIZEN ENGAGEMENT PRINCIPLES OR VALUES

Having clear principles or values can help guide a municipality's decision-making and prevent it from doing things that work against its long-term goals. It is an important exercise to think about how your municipality's principles or values might impact the practice of citizen engagement.

What does the organization believe and what are they committed to?

In creating your policy, take time to consider how your municipality's citizen engagement projects can or do reflect accepted principles or values of the municipality or of local government in general (*See 1.1.5. Contributing to community development*).

4. LEGISLATIVE AND POLICY IMPLICATIONS

The citizen engagement requirements legislated by the Government of Alberta (e.g. *Municipal Government Act*) and/or implications on existing municipal policies (i.e. employee conduct, security, safe workplace, technology use, communication protocols, etc.) should be addressed.

5. CITIZEN ENGAGEMENT STANDARDS

Municipalities are already held accountable to specific standards of engagement through the *Municipal Government Act*. In addition to this legislative guidance there should be standards that address how the municipality will work with citizens beyond the requirements outlined in the Act.

The Harwood Institute for Public Innovation (2005), a nonpartisan, independent not-for-profit that contributes thinking to solving public organizations' pressing problems around the world, has contributed four standards that describe public organizations which achieve excellence in citizen engagement.

These public agencies:

Are in the business of collecting public knowledge

In other words, these are municipalities that invest in citizen engagement to learn. They want to do more than collect information about people's preferred policy choices. They want to understand the common values that citizens hold as well as the trade-offs that they are willing to make when faced with tension or conflict between those values.

Use public knowledge to influence the work they do on behalf of citizens

This means that municipalities are doing more than building a repository of public knowledge but are finding ways to use public knowledge, including reaction to any information that they use to inform the public, to make internal decisions about their work. They are also developing performance measures to track when and how public knowledge has affected decisions or outcomes in the community.

Communicate to the public how public knowledge has influenced decisions

No matter where a municipality's engagement falls on the Spectrum of Public Participation (See 1.1.3 *The engagement spectrum today*) it is important that citizens know why decisions have been made. The question of why a decision is made helps citizens understand their role in impacting outcomes in their communities. There are times that decisions have high impacts on populations and times that decisions are highly impacted by populations. In both instances, providing the context that surrounds decisions is important to building trust between a municipality and the public.

Cultivate the culture, norms, reflexes and habits that ensure citizens understand how citizen engagement influences how a municipality conducts its business

Culture, norms, reflexes and habits relate directly back to being in the business of collecting public knowledge. The standards that a municipality sets around citizen engagement send a clear message to elected officials, administrative staff, and the public about how a municipality thinks about and acts toward the people it serves. To build a culture of learning, municipal officials need to be clear about what they expect of citizens, the type of questions that lead to public knowledge, the reflex responses that generate trust, and the types of habits that ensure citizen knowledge is used, instinctively, in the municipality's work.



6. CITIZEN ENGAGEMENT MANAGEMENT

Conducting citizen engagement often requires cross-departmental coordination, the implementation of multiple techniques and tools, and may include collaboration with external partners. A lack of clarity on the management of citizen engagement projects may result in a situation where municipal leadership does not have a handle on what type of engagement is being designed, planned, or implemented by employees. Therefore, an important element to a citizen engagement policy is establishing who is responsible for managing the municipality's engagement activities to support consistent, accurate and timely engagement.

7. CITIZEN CONDUCT

Now more than ever citizens have the ability to engage with their municipality. Technology and, more specifically, digital communication facilitates two-way and many-to-many communication between municipalities and their citizenry. Municipalities must decide how to support and handle their engagement with citizens. For municipalities that decide to elicit citizen consultation, involvement, collaboration or empowerment in decision-making via engagement techniques and tools, terms for acceptable conduct of citizens is often developed.

Both with in-person and digital engagement projects conduct guidelines and terms-of-use statements provide a transparent means of sharing the municipality's expectations of citizen conduct while interacting with the organization through engagement activities.

The guidelines or statements should indicate that the municipality reserves the right to not address participation that:

- includes foul language, vulgarities or sexually explicit content;
- is offensive to an individual or an organization, rude in tone, discriminatory or abusive;
- solicits, advertises, and/or promotes particular services, products, or political parties, advocacy groups or organizations;
- infringes on human rights or privacy;
- is considered inflammatory; and/or
- is off topic.

8. EVALUATION AND REPORTING

The inclusion of an evaluation process (*Section Four provides information on evaluation process elements*) in the citizen engagement policy ensures that relevant decision-making takes account of outcomes acquired from engagement projects. It also ensures, where appropriate, that the public is kept informed of the progress of the engagement and resulting decisions to support transparency, knowledge sharing, trust and credibility.



ROLE OF ELECTED OFFICIALS IN CITIZEN ENGAGEMENT:

- Develop the vision and principles upon which the municipality will engage its citizens;
- Clearly define the scope of decision-making authority associated with the engagement project;
- Ensure impact measures are included in the engagement project;
- Support efforts to educate and enable citizens to participate;
- Encourage and expand diversity of participation;
- Communicate the progress of the engagement project to the public;
- Use citizen input, feedback, recommendations and solutions in decision-making; and
- Communicate the rationale and results of engagement to the public.

2.2.6 Elected officials and citizen engagement policy

Elected officials have an opportunity to play a very important role in the engagement of citizens with the municipality, including its services, initiatives, and policies.

Having a policy in place for elected officials demonstrates leadership, integrity and accountability to members of the public. It ensures that elected officials model the way for municipal employees and are transparent around what citizens can expect from them.

A citizen engagement policy for elected officials should differ from the policy for administration, relative to roles, responsibilities and relationship to the community; however, it should also align with the administrative policy by demonstrating a united commitment to respectful, effective and ethical engagement practices.

A policy specifically for elected officials helps to address concerns related to complex issues such as:

- when to engage citizens in decision-making;
- who engages and when;
- the relationship between municipal-led engagement and community-driven processes; and
- the connection back to other relevant elected official policies.



Best Practices for Developing a Citizen Engagement Framework and Policy

The following reflect best practices when developing a citizen engagement framework and policy:

1. EMPLOY CITIZEN ENGAGEMENT IN THE CREATION OF A CITIZEN ENGAGEMENT FRAMEWORK AND POLICY

An investment in an administrative citizen engagement framework and policy and/or elected officials citizen engagement policy signals a commitment to meaningful and outcomes-oriented citizen engagement. To ensure this commitment represents the needs of citizens, it is important to employ engagement to generate public knowledge toward the development of the framework and policy.

2. ASSIGN RESPONSIBILITY FOR FRAMEWORK AND POLICY

Undertaking the development of a citizen engagement framework or policy is a significant project. As such, identifying a position responsible for the framework and policy ensures the project receives greater awareness and enhances accountability across the organization. Depending on how the municipality approaches the development of the policy and framework, the position is generally from senior administration.

3. INVOLVE STAFF FROM ACROSS THE MUNICIPALITY

To ensure maximum support for the final framework and policy, it is highly beneficial to actively involve and collaborate with employee across the municipality. Involving a cross-section of employees is an effective means to address issues with current practices and articulate a vision and renewed commitment to citizen engagement that incorporates the values of employees.

5. BE REALISTIC ABOUT THE UNDERTAKING

When municipalities adhere to best practices, developing a citizen engagement framework and policy is a significant undertaking. The process can take a lot of time and require additional resources or expertise from within the municipality. Strategically, formalizing citizen engagement is a significant undertaking in the sense of delivering a renewed promise and increasing opportunities to allow for meaningful engagement and a greater role for citizens in decision-making processes.

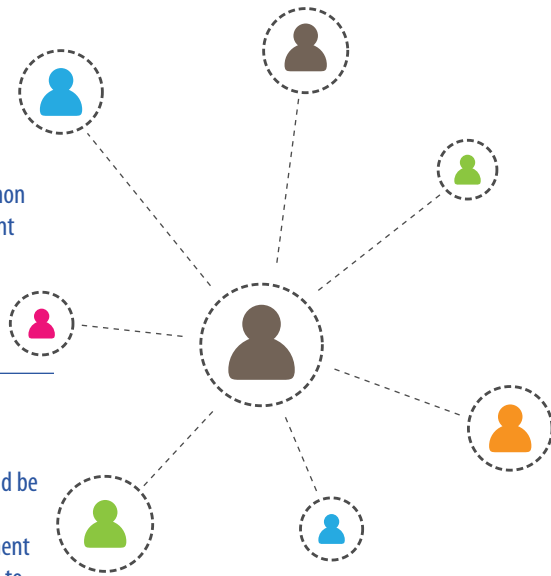
Adapted from Schalk, 2014

Use the *Evidence You Require a Citizen Engagement Policy Worksheet* in the Resource Section to guide your policy development.

INFORMING, one-way delivery of information to citizens, is the most common level of citizen engagement associated with directive decisions.

WHEN TO ENGAGE:

Citizen engagement should be considered whenever it is determined that involvement may be desirable in trying to resolve an issue and, if so, to what extent. The sharing of decision-making authority will usually be desirable where citizen acceptance of a decision appears necessary in order to achieve its implementation and that acceptance cannot be assumed without citizens being involved in the decision-making. These are the decisions where a successful outcome is unlikely without deliberative or participatory citizen engagement.



2.3 Municipal decision-making and citizen engagement

Municipalities make the decision to invest in citizen engagement relative to the decisions they face. In the context of citizen engagement, the types of decisions facing municipalities can be classified according to the perceived value of citizen influence in the decision-making process. The greater the citizen influence in the decision-making process, the less the municipality's ownership of the process and end decision.

Directive decisions are made by authorized decision-makers within the municipality.

Directive decisions are most common when a municipality has a high-level of confidence that its choice of action aligns with citizen values, meets an existing, pressing or urgent need, or is a requirement under municipal legislation (e.g. *Municipal Government Act*).

Scenarios that call for directive decisions:

- An urgent response is required to ensure a safe and viable community;
- Action is mandated as part of municipal legislation, including job responsibilities of public-facing municipal employees;
- Decisions are routine (e.g. part of regular operations) and there is no indication of unrest or discontent among citizens; and/or
- Expectations are clearly outlined in an agreement between the affected parties (i.e. a contract; terms of reference; memorandum of understanding; a guiding document).

Directive decisions can demonstrate authority, expedience and efficiency.

DIAGRAM A.



Consultive decisions are made by authorized decision-makers within the municipality, with input from citizens.

Consultive decisions are most common when a municipality has accountability for the effect of a decision on citizens and it recognizes that the decision has the potential to have a significant impact on one or more sub-segments of its citizenry.

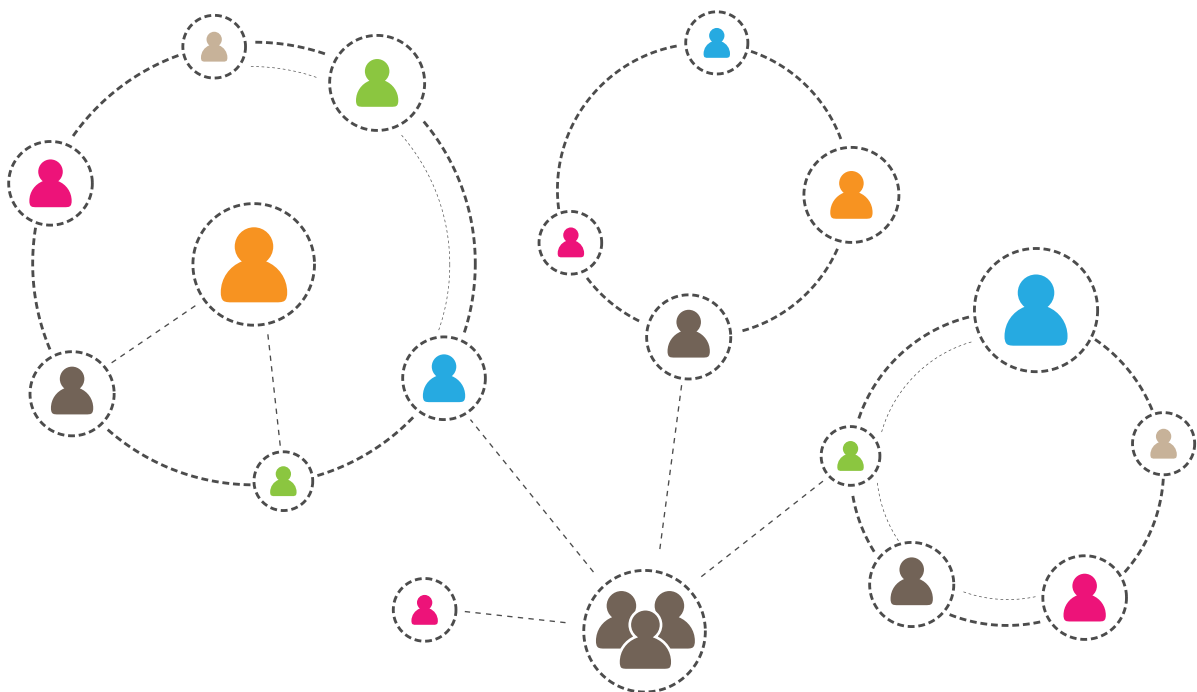
Scenarios that call for consultive decisions:

- A decision has been identified as having high potential to impact one or more sub-segments of citizenry and, as a result, a legal requirement to notify citizens and garner their input is required;
- There is an existing level of unrest, discontent or contention around a decision (i.e. limiting parking to add an additional wing of a public building; choosing the location of a new recreation centre; allowing new types of housing development in a mature neighbourhood);

- The decision requires trade-offs around core community values (i.e. the addition of a business park in an otherwise pristine green field; adjustments to utility fees to provide new service level for curbside recycling);
- The decision challenges citizens level of comfort or sense of safety (i.e. introducing a rehabilitation centre into a residential community; changing public transportation routes that affect people's daily commute; road closures that affect people's access); and/or
- Issues where elected officials request additional input or information in order to make an informed decision.

Consultive decisions can demonstrate curiosity, empathy and concern for citizens' while communicating leadership, authority and accountability for the outcome of the decision.

CONSULTING, which delivers input, experiences, evidence and suggestions from citizens to a municipality, is the most common level of engagement associated with consultive decisions.



Deliberative decisions are made by authorized decision-makers within the municipality after involving citizens to imagine and explore possible alternatives to an issue or opportunity at hand.

Deliberative decisions are most common when there is a challenging or complex question on the table and the answer involves value trade-offs for citizens in the municipality. In these scenarios, a municipality has accountability for the effects of a decision on citizens and it wants to ensure that it thoroughly explores alternatives that will result in the best outcome for the community as a whole, while respecting that citizens with differing views may be affected in the process.

One of the primary differences between consultative decisions and deliberative decisions is that the latter assumes that working alongside citizens to not only converse around possible solutions but thoroughly explore, analyze and imagine new alternatives will result in a decision that has benefit to everyone.

Scenarios that call for deliberative decisions:

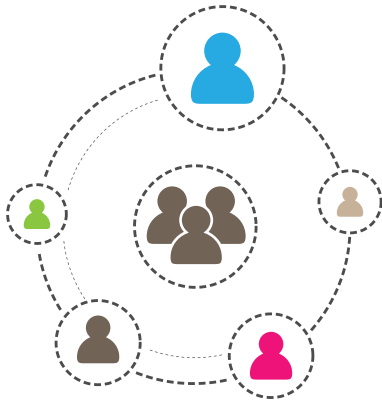
- Complex decisions with no clear answers (i.e. ending homeless in a community; revitalizing a downtown; allocating transportation coordinators for multi-use activities; investing in a new recreation centre);

- Decisions with the potential to involve significant value trade-offs and, accordingly, a high level of emotion (i.e. infill development guidelines; selecting business revitalization zones); and/or
- Exploratory decisions with the potential to shape community development (i.e. development of a local food and agriculture strategy; sub-division planning).

Deliberative decisions can demonstrate a shared commitment to community outcomes, confidence that there are alternatives with the potential to support common values, and faith in citizen's abilities to affect positive outcomes in their communities.

INVOLVING, coming together to consider relevant facts and values from multiple points of view and to think critically about the underlying tensions and tough choices to arrive at a rationale public judgment, is the most common level of engagement associated with deliberative decisions.





Participatory decisions are made by authorized decision-makers after the municipality and citizens have worked together to imagine and explore possible alternatives to an issue or decision and prioritize the preferred solution(s).

Participatory decisions are most common when citizens have a high stake and vested interest in the outcome of a challenging or complex question where the answer involves value trade-offs. With participatory decisions, a municipality retains the authority to prescribe the decision but citizens are vested in the decision-making process and decision itself. There are no surprises regarding the outcome of the decision as citizens work with the municipality on the final verdict.

One of the primary differences between deliberative decisions and participatory decisions is that the latter assumes citizens and the municipality are, if not equally, bilaterally vested in finding an amenable outcome and owning the decision presented to the community.

Scenarios that call for participatory decisions:

- Complex decisions with no clear answers and where both citizens and municipalities share a vested interest in the outcome (e.g. sustainability policy);
- Community development decisions that are directly or indirectly influenced or supported by municipalities (e.g. creation of new initiatives by community organizations

that depend on government resources and influence); and/or

- New funding, project and service delivery models that create community opportunities for multiple parties (e.g. public-private partnership initiatives).

COLLABORATION is the most common level of engagement associated with participatory decisions.

Participatory decisions can demonstrate the importance of citizens working together and on behalf of their communities. Participatory decisions can signal mutual respect among municipal officials and citizens, as well as a shared commitment to the future. Participatory decisions are most often progressive initiatives that work to align with a community's vision for the future.



Citizen-led decisions are decision-making processes and decisions led and owned by citizens; many involve technical and resource support from municipalities.

Citizen-led decisions are most common when citizens see themselves as having a high stake and vested interest in a community outcome and the ability to take action to make a difference. With citizen-led decisions, a municipality empowers citizens to bring forward a decision that it will implement.

EMPOWER is the most common level of engagement associated with citizen-led decisions.

One of the primary differences between participatory decisions and citizen-led decisions is that the municipality refrains from participating in the decision-making process for the latter.

A scenario that calls for a citizen-led decision:

- Community members want to see change on a matter and have the evidence to demonstrate they are in a position to effectively deliberate, engage their fellow public and bring forward a well-supported decision to the municipality (e.g. a plebiscite on a matter of public concern).

Citizen-led decisions can demonstrate a commitment to democratic values, a progressive stance on citizens shaping the future of the community, and

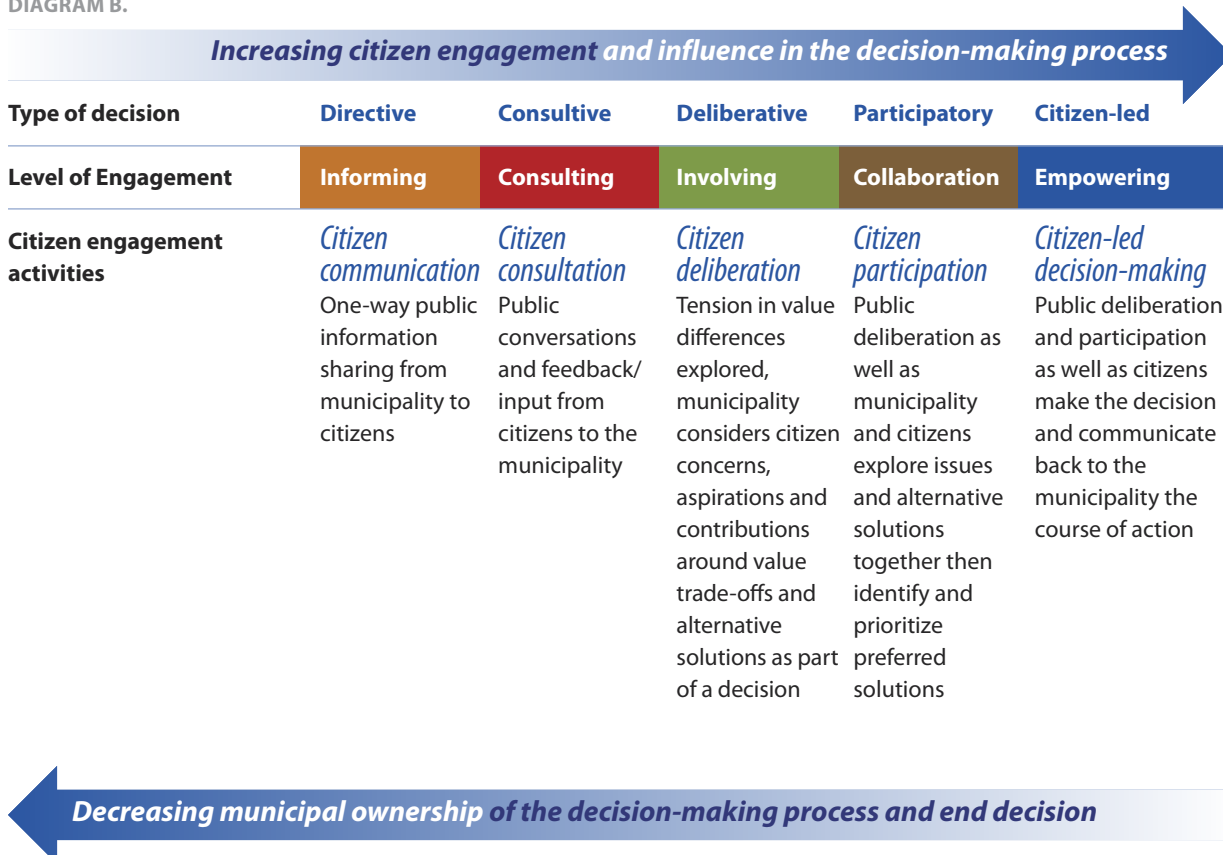
confidence in the working relationship between citizens and their elected government.

2.3.1 Decision-making and the spectrum of engagement

The types of decisions made by municipalities align toward the International Association of Public Participation's Spectrum of Public Participation (©2006) and the most common citizen engagement activities.

The following diagram illustrates how the type of decision facing a municipality lends itself toward a particular level of citizen engagement. The diagram goes further to explain the most common engagement activities associated with each level of decision and citizen engagement.

DIAGRAM B.



Adapted from Alberta Municipal Affairs, 2011; International Association of Public Participation ©2006; and The Praxis Group, 2012.



3

Planning for citizen engagement

Citizen engagement opportunities are abundant for municipalities. Given the role and responsibilities of a municipality, there are ample possibilities around everything from communicating information to empowering citizens around issues that matter to them.

In planning a citizen engagement project it is important to be intentional about what you set out to achieve. A citizen engagement plan will describe how and when a municipality capitalizes on engagement opportunities. The plan will be built upon a clearly defined issue or decision to be made, engagement outcomes, target participants and level of engagement.

Municipalities will find that there will be some content that is foundational to their citizen engagement plans. These elements can include the municipality's set of principles and core values (*See 1.1.5 Contributing to community development*) around citizen engagement that describe how you want citizens to experience your engagement projects. This foundational content can be included at the front end of every citizen engagement plan to support clear and consistent expectations.

SECTION 3

Planning for citizen engagement

CITIZENS PARTICIPATING IN YOUR ENGAGEMENT PROJECTS SHOULD BE ABLE TO EXPECT:

- **A clear and consistent approach** for all engagement projects – relative to the International Association of Public Participation's Spectrum of Engagement (*See 1.1.3 The engagement spectrum today*);
- **Communication and information sharing on the front end of the process** to provide an effective frame of reference for citizens to feel empowered to provide meaningful and informed input;
- **A co-ordinated approach to reaching out to and involving citizens** to avoid fatigue or excessive citizen engagement; particularly given that it is common for mid-size and large municipalities to be delivering a number of engagement projects simultaneously;
- **Assurance** that the decision to engage is an effective use of resources and that citizen involvement adds tangible value to the decision-making process;
- **A respectful and welcoming environment** that values citizen participation while adhering to decision-making processes, protocols and legislative requirements;
- **An inclusive environment** that allows all citizens to participate in a non-discriminatory environment and where the municipality makes an effort to attract a diverse range of participants to adequately reflect the community;
- **Transparent and responsive engagement** that demonstrates how citizen input was used and influenced the final decision as well as facilitating citizen accessibility to hear and address concerns; and
- The use of **evaluation for continuous improvement** of citizen engagement.

Adapted from Schalk, 2014



Behind a good citizen engagement plan is a clear set of principles and values that describe how you want citizens to experience engagement activities led by your municipality.

Your complete citizen engagement plan will include:

- the issue at hand and the decision to make
- desired outcomes from citizen engagement
- engagement principles and values guiding the project
- target participants
- level of engagement
- techniques and tools to engage participants
- methods of citizen recruitment
- approach to communication
- timeline
- financial and human resource requirements





CITIZEN ENGAGEMENT VIGNETTE CITY OF BROOKS

INSIGHTS INTO CITIZEN VALUES

"We actively work to engage our citizens on the front end of community planning work," explains Councillor Barry Morishita.

Despite this commitment and all of the City of Brooks' efforts to invest in inclusive community planning processes, it has had a few insightful surprises.

"We make every effort to offer broad public consultation on large-scale and high-investment projects, including the development of our new recreation facility," shares Tony Diep, Manager of Shared Services. "Yet attendance at these opportunities often fails to compare to the responses that we receive once the projects break ground."

Tony's insight is simple yet powerful.

"It's important for us to recognize that we have pockets of residents that are highly vested in specific aspects of community development, and our recreation facility is a great example of this," he says. "As a City, we expected a lot of interest in the plans for our recreation facility but instead we had a relatively small group of people with very strong connections to the project."

The City of Brooks' experience points to the nature of planning work. It can be challenging for the broader community to get engaged in and excited about future or seemingly intangible possibilities. It's this reality that makes it important for communities to have realistic expectations around engagement. It should be expected that, unless an issue is directly tied to the core values of the broader population, there will only be key segments of citizenry invested in the conversation.

The City of Brooks was also recently faced with an issue related to the development of its new recreation facility that did speak to its citizens' values.

"When it came to the new facility, our residents spoke up loud and clear once construction was underway," explains Councillor Morishita. "It wasn't the purpose of the facility but its physical footprint and impact on a section of trees that caught the attention of our community."

In this scenario, Brooks discovered its residents' attachment to its treed areas and the power of key voices in the community.

"It was an interesting experience," explains Tony. "When the City of Brooks attempted to reach out to talk about the physical impact of the facility in the early stages of planning, we didn't get a lot of response. It was only when ground was broken and the project became very real that our citizens took a closer look and realized it had the potential to affect something that they cared a lot about."

Councillor Morishita jumps in on the relationships and voices that surround community-based values. "When our community members took interest in the trees affected by the project we learned something else very important. We learned that a small number of highly engaged residents can go a long way in generating further interest in an issue. When it came to the trees, we had a couple of highly engaged residents take to Facebook to share their concern about removing trees. They made a real impact with their peers and the concern compounded very quickly. The role of our residents as influencers and potential allies for the City of Brooks in enhancing our citizen engagement activities has got our attention."

3.1

Define the issue at hand and the decision to make

It cannot be said too frequently:

The decision to be made drives your citizen engagement project.

The starting point for an effective citizen engagement plan is a clear and concise articulation of the issue that a municipality is facing and the decision that needs to be made.

Don't be shy to test your description of the issue and the decision to be made back with decision-makers. Having a clear picture of both the issue and decision is critical to the choices you make through the entirety of your citizen engagement plan.

Best Practices for Defining the Issue

There are five best practices that can make a difference to how everyone from your municipal officials to citizens participate under the issue and decision at hand:

1. Be as specific as possible about the issue and decision at hand.
2. Frame the issue and decision as an opportunity for the community to discuss alternatives, solutions and consequences.
3. Frame the issue and decision in neutral terms, as much as possible.
4. Ensure the scope of the issue and decision is appropriate and feasible (i.e. not too broad or vague; not too narrow or leading).
5. Keep the effort (e.g. numbers of citizens involved) proportional to the size of the issue.

3.2

Assessing expectations

You'll have many reasons as to why you want to engage with citizens. The reality is that some citizen engagement is mandated by legislation. There are certain issues and decisions that the Government of Alberta has determined, as part of the *Municipal Government Act*, must integrate minimum levels of citizen engagement. (See 2.0 *Foundations of Municipal Engagement for details*). There are other issues where you are working to align with internal and external expectations associated with decision-making.

With respect to internal expectations, it is important to consider two distinct groups: 1) the citizen engagement project team, and 2) the decision-makers.

Internal expectations refers to the level of engagement that your engagement project team and decision-makers are willing to get behind and support.

External expectations refers to the level of engagement that citizens expect and that you should recommend to the decision-maker.

The reality is, of course, that internal expectations may not align with external expectations. If this is the scenario then it is important to share your assessment of external expectations with your decision-makers and determine if they see the scenario in the same way. It may be that the decision-maker and, as a result, the citizen engagement project team may need to re-align their expectations with those of the public.

On the other hand, your decision-maker may suggest they want a better understanding of external expectations (further research) or will proceed with their own expectations regardless of the results of the external assessment. In this scenario, you need to be prepared to explain to citizens why a particular level of engagement is being suggested.

Use the *Internal and External Expectations Worksheet* in the Resource Section to guide your assessment.



3.3

Citizen engagement outcomes

As you work to get clear about the issue or decision at hand, why you need to engage citizens, and the most appropriate level of engagement, it is also important to use your imagination and describe the results that you want to see. By using your imagination, you can set "desired outcomes" that describe your view of the final results. It can be helpful to frame the purpose of your citizen engagement in outcome statements.

Outcome statements differ from goals or objectives. Goals and objectives tend to describe what you want to see happen; outcome statements strive to describe the final state achieved as a result of your engagement activity.

Your outcomes should be **SMART - Specific, Measureable, Achievable, Realistic and Timely.**

UNDERSTANDING SMART OUTCOMES:

SPECIFIC – Outcomes that are exact and focus on the five Ws.

Outcomes that are specific help to define expectations clearly and, typically, are written around verbs. Focus on answering WHO, WHAT, WHEN, WHERE and WHY questions.

MEASURABLE – Concrete criteria for measuring progress.

When you measure your progress, you stay on track, reach your target dates, and experience the exhilaration of achievement that spurs you on to continued effort required to reach your desired outcomes.

To determine if your outcome is measurable, ask HOW questions:
How much? How many? How will I know when it is accomplished?

ATTAINABLE – Outcomes that can be achieved through good planning.

Outcomes that may seem out of reach move closer and closer when you set attainable outcomes that encourage you to reach further.

REALISTIC – Outcomes that you are willing and able to work on.

Be sure that every outcome represents substantial progress.

A high outcome is frequently easier to reach than a low one because a low outcome exerts low motivational force. Some of the hardest jobs you ever accomplished actually seem easy simply because they were a labour of love.

TIMELY – Outcomes should be grounded within a time frame.

Your time frame gives you a reason to stop and deliberately reflect on your progress and adapt your course, if necessary.

One type of outcome will refer to the citizen experience.

For example, an outcome for **informing** citizens might be:

Citizens who participate in July's engagement sessions feel excited about the future for the community, and they report that they understand the decision that was made, how it affects them and why it was the best choice.

Outcomes can also be focused on the decision at hand.

As another example, a decision-oriented outcome for **consulting** on waste policy might be:

Decision-makers have the input they need at the October 16 Council Meeting to set waste reduction targets for the community that are realistic and achievable for citizens while contributing to significant waste reduction efforts over the next three years.

As another example, an outcome for **collaborating** with citizens might be:

Citizens who participate in the fall activities associated with our Citizen Jury feel valued for their contributions to the decision-making process, empowered to give their best advice and confident that they are partners in choosing the best path forward.

For example, an outcome for **empowering** citizens to choose between several options on how to develop a community space might be:

Citizens have the information they need to deliberate and prioritize the decisions during the month of October and recommend a final outcome for implementation by end of the fiscal year.

3.4

Target participants

There are occasions when citizen engagement is intended for and open to the mass public. These occasions can include elections, referendums, and plebiscites on key social issues. However, it is more common that citizen engagement is intended for key segments of a municipal population. As an example, there are target audiences (i.e. sports teams, coaches, instructors, athletes) inclined to show an interest in the revitalization of a local recreation centre. Whereas there might be a different set of citizens, while possibly showing some overlap, concerned about road closures near an elementary school.

In citizen engagement, the term audience is a bit of a misnomer. While you will inform by broadcasting some information out to the public, the majority of your engagement work will involve pursuing feedback, input or deliberating. In this case, your audience becomes a group of participants.

Before considering engagement activities, including appropriate techniques, tools and logistics, it is important to have a good understanding of the citizens and special interest groups who are most likely to be impacted by and take an interest in an issue or decision. Part of this profiling is also about considering what level of engagement is going to satisfy the needs of the municipality as well as the needs of citizens.

WHO WILL YOU ENGAGE?

Target participants are defined as those with an interest in or who may potentially be impacted by an issue or decision. There are many ways to identify citizens and special interest group participants. Here is one approach:

1. Ask key members in the community who they think will be interested in the issue or opportunity.
2. Identify organized groups and individuals who might be interested in the potential impacts or concerns related to the issue or decision.

For example:

- people living near any proposed actions;
 - local activists;
 - local community groups;
 - non-profit groups with associated interests;
 - potentially responsible parties; and
 - local industries or business.
3. Identify any groups that may be especially hard to reach.
 4. Identify groups and individuals that may not typically be thought of as being a part of the citizenry (i.e. elected official, government agencies, media, internal stakeholders).

Source: International Association for Public Participation, ©2006



In many communities, it is common for elected officials to engage in coffee chats or informal conversations with citizens. If well-prepared, these can be excellent forums to gauge citizen perceptions on an issue. However, it is important to note that these activities are informal and will not directly influence a decision but rather citizen engagement processes.



CITIZEN ENGAGEMENT VIGNETTE TOWN OF SYLVAN LAKE

SYLVAN LAKE EAT AND GREET TARGETS YOUNG, FAMILY-FOCUSED CITIZENS

In 2014, the Town of Sylvan Lake adopted its forward-looking Municipal Development Plan (MDP).

Sylvan Lake is a young community. Its census confirms that the average age is 31 and more than half the population is under the age of 35. The town's demographics also show that it's a family community - with many families with young children embracing the area for its high quality of life. This also means families seeking exceptional amenities, and looking to the town to make these investments.

When the Town of Sylvan Lake was creating its MDP, it wanted input from these families. The challenge of course is that young parents are busy. They are out and about putting community amenities to use, with little time to spare to attend community consultation events.

Enter targeted recruitment.

The Town of Sylvan Lake knew its demographics and took the time to understand this segment's values. They knew their MDP would benefit greatly from input from the heads of young families and they knew this demographic was eager to share their opinions but short on time. This is how the Town of Sylvan Lake came to implement Eat and Greets. These are citizen engagement activities that meet young families where they are at - out in the community participating in informal and formal activities.

The Town offers a meal to residents who take the time to connect with the municipality and share their input on a hot topic. In the case of the MDP, the Eat and Greet featured information-sharing, opinion collection, and a priority setting exercise known as a dot-mocracy. The Eat and Greets often attract over 200 participants, and add a valuable and highly sought after perspective to the more traditional and less targeted open houses and online survey open to all residents.

3.4.1 Target participant perception audit

Once a list of target participants is identified, it is important to gain an initial understanding of how they are likely to view the issue or decision to be made. This is an opportunity to begin developing constructive citizen relationships.

A typical activity at this point is to conduct interviews with citizens who represent a range of anticipated perspectives. To make the most of this you can:

- Meet informally with citizens in an environment familiar to them;
- Initiate or revitalize relationships with individual citizens or special interest groups and establish communication; and
- Let citizens know that you understand their issues by providing direct feedback through meetings and personal correspondence.

You may want to conduct a perceptions audit, which can be aided by developing an interview guide. Here are some questions you may want to ask target participants:

- How do you perceive the potential impacts?
- What geographic area will be concerned?
- How much variation is there in how citizens in different geographical areas view the issues?
- Who are the leading groups in the community?
- Who are the opinion leaders in the community?
- What groups or individuals are already involved in similar issues?
- What potentially affected citizens are not likely to be represented by an existing group?

- What is the history of citizen engagement in this community?
- What would make citizen engagement on this issue or opportunity credible?
- Who else should we be talking to?
- Is there anything else you would like to share?

Source: International Association for Public Participation, ©2006

Once you have compiled the input check-in with the interviewed citizens to test the findings and confirm if the perceptions were accurately captured then use what you have learned to develop a comprehensive list of issues or concerns related to the decision.

Examples may include:

- livelihood, employment or lost productivity;
- financial security;
- property values or rights;
- quality of life;
- aesthetics;
- personal health and safety;
- endangered environmental resources;
- growth management;
- nuisance issues such as noise, odours, traffic;
- cultural, racial or gender identity;
- restricted freedom of choice; and
- access to education.

Also consider what concerns may affect how people view the engagement process, such as:

- political controversy;
- history of neglect or mistrust;
- equity concerns; and
- apathy.

Source: International Association for Public Participation, ©2006

3.4.2 *Aligning the engagement topic with target participants*

A comprehensive understanding of issues or opportunities and the citizens will help you in your next step of selecting the level of engagement for your project and developing your citizen engagement plan.

Use the *Aligning the Engagement Topic with Target Participants Worksheet* to help you identify areas where shared understanding exists and where diversity exists between the target participants and their perceptions on the engagement issue or decision to be made. The worksheet may assist you in targeting resources and activities to areas of importance in your citizen engagement plan.



CITIZEN ENGAGEMENT VIGNETTE COUNTY OF STETTLER

IF WE BUILD IT, WILL THEY COME? THE COUNTY OF STETTLER ADJUSTS ITS COURSE AS IT GOES.

There are times when citizen engagement is a head-scratcher and, rather than providing an opportunity to connect with invested residents, it becomes an opportunity to learn a few things about citizen engagement itself.

The County of Stettler found itself in this position in January 2015.

“As a County, we often receive concerns from our local population about spending and the allocation of taxpayer dollars,” explains Niki Thorsteinsson. “It’s more than reasonable for our citizens to want more information about and the opportunity to influence our budget process and allocations.”

The County took the community interest in its budget to heart and hosted a 2015 Budget Consultation meeting on January 7 from 3 p.m. to 7 p.m. It provided an open invite to the community, advertising the session through the local newspaper, County website and social media. In the end, six Councilors attended the event and zero citizens.

“We were surprised that nobody showed up,” shares Niki. “More than this, it’s a catalyst to start to question the value of citizen engagement.”

The County of Stettler quickly dismissed this thinking.

“We don’t know exactly what happened with the 2015 Budget Consultation,” says Niki. “Maybe people are happier than we think with our approach to spending? Maybe the timing was off? Maybe we didn’t offer the right type of invitations or the right accommodations to invoke attendance? Regardless, it was one offering, and we’ve been more deliberate about creating opportunities to understand our citizen’s engagement needs.”

Rather than broadly inviting its public into focused decisions, the County of Stettler has focused on creating citizen-led opportunities for people to share the things on their mind. As a County, they never hesitate to put some of their key initiatives on these agendas. However, the primary emphasis has been on understanding what’s top of mind for citizens and, as a result, taking a future-oriented view to creating engagement opportunities that attract and matter to their public.

3.5

Selecting your level of engagement

Once you've assessed the alignment between the internal and external expectations and have clarity surrounding target participation perceptions, and the issue or decision to be made then it is time to review the types of decisions that municipalities make and how the desired engagement outcomes align with these decisions (See 2.3 *Municipal decision-making and citizen engagement*). From here, you're in a position to choose a level of engagement (See 1.1.3 *The engagement spectrum today*).

To support finalizing your level of engagement use the information above and complete the *Selecting Your Level of Engagement Worksheet*.

3.6

Refining your engagement outcomes

Using the results of the internal and external expectations assessment, target participant perception audit, and selected level of engagement, it is beneficial to revisit the decision to be made to ensure your citizen engagement project will address and meet your desired outcomes.

Step 1: Use the information collected to determine if the municipality's statement of the issue or decision to be made is mirrored by the citizens.

Step 2: Review with the decision-maker any discrepancy between the internal and external views of the issue or decision to be made and expectations of the engagement project.

Step 3: Consider if and how the discrepancy between the internal and external views and engagement expectations can be addressed.



It is difficult to maintain sustainable decisions if the municipality and its citizenry do not agree on the issue or decision to be made.

Step 4: Seek out other processes and information sources for issues that cannot be addressed within the scope of your engagement project. Providing information to citizens and decision-makers will help them to place attention on the issue and decision your engagement project will address.

Step 5: Refine the engagement project outcomes to reflect the results of the expectations assessment, perceptions audit, and selected level of engagement.

Source: International Association of Public Participation, ©2006

3.7

Techniques and tools to engage citizens

Choosing the most appropriate techniques and tools to engage citizens, involves a little bit of analysis. You need to consider the nature of the decision at hand, the corresponding level of engagement, and the profile of your target audience.

By choosing techniques and tools, you are deciding how to approach engagement in a way that will align the needs and capabilities of your municipality with those of your citizens.

The type and number of engagement techniques and tools that you choose will depend on the decision to be made, its complexity and your target audiences.

When you choose your engagement techniques and tools, you need to have your participants' experience in mind. You need to consider the advantages and disadvantages of each engagement technique and tool and how they may work together to ensure your participants have everything they need to adequately play their role in the decision-making process.



CITIZEN ENGAGEMENT VIGNETTE TOWN OF SUNDRÉ

SELECTING YOUR ENGAGEMENT TOOLS: WAYFINDING THROUGH SUNDRÉ

It's rare to notice community signs until you need them to find your way. The Town of Sundre wanted to update its wayfinding infrastructure but more than that, it wanted to ensure it was functional and captivating for the people who used it - residents and visitors.

Economic Development Officer Jonathan Allan turned to the wisdom of the crowd. "In local government, it is generally accepted that Town Council has the final decision," explains Jonathan. "But it is also accepted that the best and most-supported decisions are well-informed by citizens and based on legitimate information."

Jonathan partnered with two of his colleagues, Sundre's Community Development Manager and Community Planner, to design a simple yet elegant approach to consult with locals with expertise in community planning and then the community before taking a recommendation to Town Council.

"We took the time to get really clear on our challenge and it boiled down to three things," shares Jonathan. "We needed people highly familiar with our community to help us segment or zone it, identify appropriate monikers for each area, and then help us determine where to install the most helpful and impactful signage."

Jonathan and his colleagues used targeted participation to generate the first round of input. They created physical maps and took them out to specific populations - locals with immense knowledge of the community.

"We conducted 15-minute, one-on-one interviews with town staff who know this community like the back of their hand," says Jonathan. "From here, we did the same activity as a focus group with Town Council, our Downtown Area Revitalization Committee and our Sundre Regional Recreation Area Committee."

With the input from these highly engaged and experienced citizens, Jonathan and his team created a segmented map of Sundre. The team found that the targeted input legitimized the initial thinking around Sundre's wayfinding enough to take the map and some branding alternatives out to the general population.

"We had really good input and it pointed us in a couple of key directions," explains Jonathan. "We were able to identify zones within Sundre with confidence and develop some well thought out options to brand these areas as well as place signage to them."

Sundre has recently entered into the second phase of its project - public consultation. "We're now at the stage where we want to gain input from our community on branding possibilities - which includes names for each area of the community as well as visual branding," says Jonathan. "We are using online and hard copy surveys to garner this input. We believe surveys are the best tool for residents to help us prioritize the options that our staff and targeted citizens helped to develop. We found interviews and focus groups exceptional for the creative thinking. Now our surveys will help us narrow down people's preferences and this will give us the options that we take forward to Council for final decision."

Some of the most common elements of a effectively implemented citizen engagement technique or tool, whether in-person or in a digital environment, include:

- A warm welcome;
- A means, if relevant, for participants to get to know the engagement project team and one another;
- Context setting and information delivery;
- Clear direction on the decision at hand and participants' level of engagement;
- Accountabilities of the municipality and citizens;
- Citizen recruitment;
- Clear information about next steps;
- Closing; and
- Follow up.



These elements hold true across the engagement spectrum. For example, informing focuses on a municipality sharing information about a decision it has made with citizens. Depending on the novelty of the information and its impact on citizens, it can be very important for communication to include a welcome, information about the decision-maker, context about the decision, a description of how and why a decision was reached, information about next steps, a closing, and a commitment to provide more information as it comes available.

3.7.1 In-person v.s. digital citizen engagement techniques and tools

When considering your techniques and tools for engagement it is important to explore which delivery mode aligns with your desired outcomes, target audience and level of engagement.

In-person	Digital	Mobile
<ul style="list-style-type: none"> • Intensive and focused participation • Builds direct and strong relationships • Taps into group creativity • Manages the engagement atmosphere • Acts as project milestones • Creates visibility with target participants 	<ul style="list-style-type: none"> • Possible to increase number of participants for reduced costs, compared to in-person • Easy to have multiple and ongoing interactions • Can foster deep issue exploration • Today's online environment is participatory by nature and many tools are easily accessible and low cost 	<ul style="list-style-type: none"> • The phone is always with you, always on • Geo-location engagement and tracking allows for personalization and new data opportunities • Camera allows for new data opportunities • Scales well • Downloadable applications are available to support citizens reporting to municipalities (e.g. <i>FixMyStreet</i> to report potholes or damaged sidewalks) • Great for connecting with some hard-to-reach demographics

Source: Alberta Municipal Affairs Public Input toolkit, 2014 p.2-22

IN-PERSON CITIZEN ENGAGEMENT SCENARIO

Your municipality has offered to lead a citizen panel to explore the potential for online voting. You have an extensive citizen engagement plan in place and your municipality will be hosting 12 members of the public. Your participants will be meeting in a community hall on four separate occasions and they will be supported by a skilled facilitator. This is your first time hosting a citizen panel as a municipality and you've invited the local media to learn about the process. You really want both the citizens and media to have a positive experience with your engagement project team. As the host, your role is to create and maintain an inviting space where your participants, feel valued and appreciated. To do so, you'll want to pay attention to the physical conditions (i.e. cleanliness; access to seating and tables; the configuration of seating and tables to align with the social dynamics required for effective participation; the amount of natural light; access to food and drink throughout the day) and the social conditions (i.e. warm welcomes; introductions; adequate breaks; check-ins to ensure participants have enough information and time to participate without being overwhelmed or bored by information; opportunities for questions; conditions that create a safe space; a facilitator that adheres to the timelines communicated to participants). As the host organization, you may engage experts (i.e. facilitator; subject matter experts; technical support) but you're ultimately accountable for citizens' experiences.



Supporting citizens to participate in engagement activities is not about controlling the environment or their experience. It's about finding the balance between order and chaos - also described as the chaotic balance. If your activities are too orderly then citizens may feel stifled in their opportunities to explore concepts and relationships. If your activities are too chaotic then citizens may not understand how to participate effectively. Using a sports analogy, chaotic activities have a clear playing field and set of rules and these well-known boundaries create the conditions that allow citizens to play the game in whatever way makes the most sense to them.



As host, you are working to connect people to the topic at hand. Your goal is not to develop an engagement plan that engages people. Engagement is not the ultimate goal. The ultimate goal relates to what is needed around a decision, and engagement is a path to get there. You want people engaged around the issue and decision, and not only engaged in the process itself.

CITIZEN ENGAGEMENT IN A DIGITAL ENVIRONMENT SCENARIO

First and foremost, digital engagement goes beyond one-way communication and sharing information about upcoming in-person activities. Digital tools can be used to support all types of engagement activities; however, there are different risks and hosting requirements. Let's say that you want to host the same citizen panel on online voting in a digital environment. Your options are quite different. You can choose to allow citizens to engage in either a synchronous environment (e.g. people are online at a scheduled time to communicate using tools such as web video technology and instant chat) or asynchronous environment (e.g. people can choose to be online and contribute at different times, although usually within a set timeframe, using tools such as web forums and wikis). You can also choose to use visual technology (i.e. video and pictures) or written technology (e.g. the written word). When you are hosting in an online environment it is very important to consider how you can build trust and effective relationships between people (i.e. facilitator-participants; participants-participants). It is estimated that 98 per cent of communication is non-verbal and you are losing a lot of this in the digital environment. Even video-conferencing technologies tend to focus on one or a few participants at a time, making it hard to make sense of any social dynamics playing out between people. For this reason, one of your primary responsibilities as host is to find ways to make certain aspects of participation (e.g. level of comfort with one another) more visible than you would otherwise need to achieve in an in-person environment.



Digital citizen engagement is not about the technology. The more invisible the technology feels, the better it is for citizens to focus on the issue at hand. The idea of digital engagement is that it supports greater accessibility, both in terms of eliminating the impact of the physical environment and, possibly, the requirement for everyone to be available at the same time.



3.7.2 Selecting your techniques and tools

While some techniques and tools may help you achieve more than one outcome at a time, most issues and decisions will require multiple techniques and tools to meet all the identified outcomes. The following chart provides an overview of techniques and tools available to municipalities, over and above what is described and prescribed through the Municipal Government Act.

Delivery Mode	Technique/Tool	Advantages	Disadvantages
In-person	Over the counter allows citizens to drop in to the municipal office to discuss the issue or decision.	<ul style="list-style-type: none"> • Citizen can choose time to drop-in • Citizen gets one-on-one time with municipal officials • Great if a small number of citizens have a high interest 	<ul style="list-style-type: none"> • Input is often verbal and must be recorded • Relatively time-consuming • Cannot accommodate large numbers
In-person	Informal “doorway” meetings are informed neighbourhood discussions which may be initiated by the municipality or citizens	<ul style="list-style-type: none"> • Builds trust and familiarity • Gathers in-depth information relatively quickly 	<ul style="list-style-type: none"> • May require several meetings to cover all interested parties • Requires skill on the part of the municipal officials to keep discussion on track and record input
In-person	Advisory committee meetings with invited citizens meeting several times to refine and discuss options	<ul style="list-style-type: none"> • Allows time for members to get to know one another, reflect and refine their input • Builds consensus about detailed recommendations 	<ul style="list-style-type: none"> • Committee may not be accepted by all citizens • Requires major time commitment
In-person	Round-table meetings with usually less than 20 people and includes a formal agenda	<ul style="list-style-type: none"> • Promotes exchange of ideas • Good format for consensus building 	<ul style="list-style-type: none"> • Limited number of participants at each session • Must be well facilitated and recorded • Can be perceived as a technique to “divide and conquer”
In-person	Workshops where participants can “roll up their sleeves” and work together to assess information and create recommendations	<ul style="list-style-type: none"> • Promotes group problem solving and exchange of ideas • Can lead to innovative recommendations 	<ul style="list-style-type: none"> • Requires extensive preparation • Must be well facilitated • Requires time commitment from participant
In-person	Town hall meetings are larger meetings with a formal agenda and formal presentations	<ul style="list-style-type: none"> • Involves many people at once • Everyone gets to hear what everyone else has to say • Involves subject matter experts 	<ul style="list-style-type: none"> • Media often attend because meetings can become confrontational • Must be expertly planned and facilitated • “Showboating” at the microphone can be a problem
In-person	Open house sessions offer an opportunity for people to drop in, review information, talk to a municipal official, and submit their preferences	<ul style="list-style-type: none"> • Allows many people to review information and talk to municipal officials • People can spend as much, or as little, time as they wish • Non-confrontational format 	<ul style="list-style-type: none"> • Will not result in any definitive input unless designed to do so • Does not promote interaction or consensus building among citizens

Delivery Mode	Technique/Tool	Advantages	Disadvantages
In-person	<p>Citizen juries are composed of 12-20 randomly selected citizens representative of their community who meet over several days to deliberate on an issue</p>	<ul style="list-style-type: none"> • Provides opportunities to introduce new perspectives and challenge existing ones • More careful examination of the issue • Promotes consensus building • Brings legitimacy and democratic control to nonelected public bodies • Small size of individual groups and their non-intimidating nature allows for innovative ideas and active participation 	<ul style="list-style-type: none"> • Exclusive - only a few individuals participate • Potential problems lie in initial stages of preparation (e.g. jury selection, agenda setting, witness selection) • Process requires significant resources and intensive time commitment for participants and organizers • Influence on final decision isn't guaranteed if the government is not formally committed to take the results into consideration • Can be difficult to generate neutral and complete briefing material
In-person	<p>Citizen panels are a randomly selected group of 12 citizens that meet routinely (e.g. four or more times) to consider, discuss and deliberate issues and make decisions or recommendations</p>	<ul style="list-style-type: none"> • Proportion of panel members can be replaced at each meeting (i.e. 4 members) to increase the overall number of participants • Multiple panels can be held and run to increase participant numbers and reduce exclusivity • People benefit from discussion within groups, but also from discussing issues with family and friends outside of the panel • Small size of individual groups and their non-intimidating nature allows for innovative ideas and active participation 	<ul style="list-style-type: none"> • Less exclusive than citizen juries, but still only a few individuals participate • Potential problems lie in initial stages of preparation (e.g. selection of panel members, agenda setting) • Process requires significant resources and intensive time commitment for participants and the municipality • Can be difficult to generate neutral and complete briefing material
In-person	<p>Consensus conferences are a dialogue between subject matter experts and citizens open to the public and the media. A panel of citizens plays the leading role (10-16 people who are introduced to the topic by a professional facilitator). The citizen panel formulates the questions to be taken up at the conference, and participates in the selection of subject matter experts to answer them. During the first day, subject matter experts present their answers to the questions from the citizen panel. During the second and third days, questions are clarified and discussions are held between the subject matter experts, the citizen panel and the audience. The citizen panel produces a final document, presenting their conclusions and recommendations.</p>	<ul style="list-style-type: none"> • Process of communicating information about the conference topic provides a strong educational component • Useful method for obtaining informed opinions from lay persons on complex issues • Small size of individual groups and their non-intimidating nature allows for innovative ideas and active participation 	<ul style="list-style-type: none"> • Recruitment method may not ensure representative participation • Exclusive process • Elaborative process requiring significant resources • Multiple conferences may be required to ensure that broad, representative opinions are sought

Delivery Mode	Technique/Tool	Advantages	Disadvantages
In-person	<p>Deliberative polls are built on the opinion poll concept with the addition of deliberation. The polls measure what citizen's think once they are informed and engaged around an issue or decision. It is composed of a randomly selected sample of citizens (e.g. large or small groups of 50 to 500+ persons). It involves polling the participants, followed by discussion, and finally, polling them again</p>	<ul style="list-style-type: none"> • Provides insights into public opinion and how people come to decisions • Seeks informed opinions, does not force people to reach consensus • Large, random sample • Changes in responses can be observed after the deliberative intervention takes place • Helps to measure citizen's values and preferences • Small size of individual groups and their non-intimidating nature allows for innovative ideas and active participation 	<ul style="list-style-type: none"> • Incentives (e.g. honorarium) are important • Requires a lot of preparation time • Although sample size is large and random, ensuring representativeness is difficult • Process requires significant resources and intensive time commitment for participants and the municipality • Can be difficult to generate neutral and complete briefing material
In-person and/or digital	<p>Discussion guide or "Kitchen Table" booklets let citizens organize among themselves, discuss an issue, and fill out an in-depth workbook either online or on paper</p>	<ul style="list-style-type: none"> • Uses people's existing social networks • Little staff time required to compile and analyze • Paper-submitted booklets can be manually entered into the software to make analysis easier 	<ul style="list-style-type: none"> • Discussion Guides and booklets are time consuming to design well • Requires resources to input paper-submitted booklets into software for analysis
Digital	<p>Online "help desk" or scheduled online chat allows anyone to ask about the plans and talk to an expert (e.g. via Skype, Google Chat, Facebook Chat, Twitter or email)</p>	<ul style="list-style-type: none"> • Citizens can choose a time to drop in • Citizens who cannot drop in during business hours or reach the location can still participate • Municipal officials can converse with multiple citizens at once • Depending on how the "help desk" is set up, everyone's questions can be public, or they can just be recorded and not visible to everyone 	<ul style="list-style-type: none"> • Harder to guarantee that participants are citizens of the area in question • Needs terms of use if everyone's comments are public in case abusive comments need to be removed
Digital	<p>Webinar for presentation-style meetings (e.g. via LiveMeeting, Skype, GoToMeeting, Google Hangout)</p>	<ul style="list-style-type: none"> • Citizens can attend from anywhere • Easy to record and post online for people who missed the event 	<ul style="list-style-type: none"> • Technical difficulties may arise, especially with video and sound
Digital	<p>Digital Charrettes, Scenario Planning, and Collaborative Writing allow citizens to work together in the digital environment (e.g. IdeaScale, Wikispaces, MetroQuest)</p>	<ul style="list-style-type: none"> • Citizens can participate at their convenience, allowing those who cannot attend an in-person technique to still provide input 	<ul style="list-style-type: none"> • Somewhat challenging (but possible with registration that includes postal code) to identify which input came from local citizens compared to citizens of other municipalities • Can be expensive and/or time consuming to maintain

Delivery Mode	Technique/Tool	Advantages	Disadvantages
Digital	<p>Discussion forums provide the ability for citizens to engage in asynchronous discussion over a period of time to build consensus, brainstorm and/or questions as well as interact with and react to ideas generated</p>	<ul style="list-style-type: none"> • Builds community by promoting discussion on issue or decision to be made • Allows time for citizens to reflect, research and compose their thoughts before participating in the discussion • Allows participants to share information, ideas and perspectives • Facilitates knowledge sharing and learning by allowing citizens to view and to respond to the contributions of others • Allows subject matter experts to participate in the discussion by posting information and responding to questions • Potential to save time summarizing and analyzing engagement results 	<ul style="list-style-type: none"> • Need to be prepared for technical difficulties. • Requires extensive preparation for engagement design and/or equipment set-up • Requires moderation or facilitation
Digital	<p>Online survey or polling is a survey tool in which citizens submit responses related to an issue or decision online by completing a questionnaire.</p>	<ul style="list-style-type: none"> • Targets citizens with the most interest in the issue of decision • Is accessible 24/7 • Allows participants to share opinions and perspectives 	<ul style="list-style-type: none"> • The survey or poll software may not provide the ability to limit responses therefore citizens may be able to submit multiple responses skewing the data

Adapted from Alberta Municipal Affairs Public Input Toolkit (2014) and Sheedy (2008)

BUT WHAT ABOUT COFFEE CHATS?

There's great benefit, especially as an elected official or a member of administration, to connect with members of the public at your local coffee shop. It's a great means to keep the pulse of the community. Sitting down with citizens over a 'cup of joe' taps into existing social connections, it allows municipal officials to communicate with citizens in an environment in which they are comfortable and, it helps to build relationships between elected officials and their constituents.

Still, these outcomes are more akin to the practice of communication (sharing information, exchanging ideas) versus the practice of engagement (integrating information and ideas into decision-making).

Replacing citizen engagement with informal coffee conversations reveals the following potential pitfalls:

- The size of the group is usually small, random and can be viewed as exclusive (only a few citizens participating at one time), therefore representativeness of the community can be difficult to achieve;

- The conversations can often leave the impression with citizens that they have influence on the final decision to be made by a municipal council when in reality the dialogue is only taking place with one or two elected representative equating to one or two votes in a council decision-making process;
- It can be difficult to generate a neutral discussion; and
- Input is often verbal, difficult to record and open to individual interpretation.

Engage in coffee chats for what they can offer but be realistic about their benefits. For example, communicating with citizens in this way can provide effective community issue, opinion and perception indicators that support the design, planning, implementation and evaluation of citizen engagement projects.





SURVEYS THAT WORK FOR YOU

When municipalities are seeking input, surveys are a convenient and often used tool. They are a flexible tool that can accommodate qualitative and quantitative measures as well as be presented through a variety of mediums.

The Regional Municipality Of Wood Buffalo has turned to surveys to collect information from residents as part of public consultation on a number of occasions.

"We're a large municipality with some unique demographics," explains Lynley Kotyk, Advisor, Public Affairs. "Our population tends to be quite young and invested in careers that require shift-work. We have found that online surveys are a meaningful way to connect with our residents and garner input in a way that works for them."

The regional municipality has relied on surveys to consult with residents on programming for year-round community programming at its Jubilee Plaza, Community Standards Bylaw, and to come up with a solution to snow and ice control during the winter months.

"We treat surveys like the dynamic tools that they are," shares Lynley. "We work with subject matter experts to create the

appropriate questions. We work with Council to get really clear on the information that they need to make an informed decision. We focus on the target audience to decide how to collect survey information."

When it came to programming for Jubilee Plaza, the Regional Municipality of Wood Buffalo made its survey available in hard copy, online, and, during events in the plaza, through members of the Mayor's Advisory Council on Youth who carried tablets and could encourage residents to participate in the survey.

"At the end of the day, tools are created to help us get a job done as easily as possible," says Lynley. "The tool has to match the need. In citizen engagement, surveys are helpful for consultation. But they also have to be designed the right way to collect the required information, be accessible for our target participants, be understandable and easy to complete, and provide information that is easy enough to analyze and present back to our Council members."

While surveys have been a key tool for the regional municipality, they certainly aren't the only tool in its arsenal. More specifically, surveys are customized to work within larger citizen engagement plans and are often one of the first phases of information gathering and a means to inform further engagement activities.

GOING “SOCIAL” WITH CITIZEN ENGAGEMENT

There are thousands of social media platforms available to connect with citizens. It's critical to be very clear about how you make the most of social media tools.

One common pitfall is mixing up citizen engagement opportunities offered through social media with the promotion of these activities via social media.

For example, a municipality can use Twitter as a conversational platform for set time periods to invite feedback (consultation) on an issue or decision. It can be one of several tools used as part of a consultation initiative.

It is worth noting that Twitter can also be used to disseminate information about citizen engagement opportunities.

Well used social media platforms can be efficiently and timely for communication, increase citizen engagement, and it can offer ways to connect with hard-to-reach citizens and special interest groups. Social media provides a low-cost, timely and highly accessible solution for these challenges.

Social media can complement other citizen engagement methods by:

- Providing more legitimate and easily accessible ways to participate in conversations with citizens and special interest groups;
- Diversifying public input by including the voices of hard-to-reach citizens and special interest groups;
- Allowing access to existing community interests and networks;
- Providing cost-effective means to share information about offline engagement opportunities;
- Driving traffic to hosted spaces, including websites with important information or discussion forums; and
- Offering creative ways to make data and information more useful and understandable to citizens and special interest groups.

The [*AUMA and AAMDC Social Media Resource Guide*](#) provides more information on how to integrate social media into your citizen engagement work.

3.7.3 Important considerations for the use of digital engagement tools

There is no doubt that citizens are making use of web-based and social media platforms to rally around community issues and opportunities. It's also becoming more common place for municipalities to have a web and social media presence – whether for branding, marketing or engagement purposes.

However, while the popularity of digital tools abounds, this doesn't automatically mean that digital engagement will be an effective avenue for your municipality.

Regardless of your familiarity with digital engagement, digital still refers to tools and engagement to the connection between your municipality and its citizens. Therefore, the question at hand before you dive into digital engagement tools is:

How can a digital presence enhance or benefit your citizen engagement project?

RESOURCE:
The AUMA and AAMDC Social Media Resources Guide offers more information on how social media can be effectively applied to your citizen engagement plan.

In some cases, digital engagement can be used to mirror more traditional engagement techniques (i.e. a Facebook post that accompanies a notice in the newspaper; an online plebiscite to complement voter turnout), to supplement a realm of activities (i.e. an online poll to capture citizen sentiment and perceptions in advance of consultations; an online voting exercise to prioritize the alternatives identified by a citizen panel), or as stand-alone initiatives (i.e. a digital message from the mayor about summer construction; a Twitter conversation to explore alternatives to a summer fair). In other cases, particularly depending on the scale of the initiative and the resources available and familiar to your target participants, digital engagement could detract from the effectiveness of your engagement investments.

While digital engagement tools provide new and powerful ways to bring municipalities in contact and into conversation with citizens, they also create unique challenges. While not necessarily a barrier to using digital engagement tools, it is important for municipal officials to consider that:

1. Despite the growing popularity of digital communication and engagement tools, they do not fulfill any of the legislated engagement requirements mandated in Alberta's *Municipal Government Act* (Alberta Municipal Affairs, 2015).
2. Legal issues and definitions regarding privacy and protection of information remain unclear in digital environments and, without due care, may impact the ability of the municipality to fully leverage online publically accessible information (Treleaven, 2014).

3. Evaluation methods to understand the effectiveness of digital engagement is an area requiring further development. As it stands, the most common practices are simply a count of digital participants and monitoring sentiment.
4. Municipal staff, those responsible for facilitating digital engagement activities, must have the skills and knowledge to leverage and verify digital content, such as the ability to geo-locate comments.
5. There is potential for municipalities to be exposed to organizational reputation risks as a result of failing to develop and enforce rules to regulate digital comments as well as resources to monitor online presence and discussion (Treleaven, 2014).
6. While digital citizen engagement may attract a diverse and larger audience, certain citizens have barriers to participation, such as access and internet connection speed (Bryer, 2011).





The Institute for Local Government (2012) suggests digital techniques and tools in citizen engagement are able to support informing, consulting and deliberative levels of engagement.

Informing citizens:

Encouraging and helping to create more informed citizens contributes to a stronger community and helps prepare citizens who participate in engagement projects. Increasingly, especially with fewer traditional media covering local issues, information sharing by municipalities is imperative.

Websites, email and social media are fast becoming prevailing tools for disseminating information to citizens online. A growing number of municipalities recognize that a strong online presence will help them to keep citizens more informed about and engaged with local issues. Therefore, municipalities are increasingly making efforts to develop communications and engagement strategies with a strong online component.

Online communication with municipalities can also provide greater access to municipal officials and can help citizens be more understanding when difficult decisions have to be made.

Key strategies to inform citizens:

- identify and prioritize topics of interest;
- make sure posted information is easy to understand and accessible;
- communicate in a timely way and regularly;
- make it easy for people to follow specific topics of interest (i.e. tagging; categorizing; RSS);
- offer online information through multiple platforms and formats;
- tailor messages to the appropriate online platform;
- promote transparency and engagement by making agendas, minutes and background information available to residents; and
- use Geographic Information System (GIS) map applications to make land use and other information easily accessible and understandable to the public.

When preparing your survey or poll consider the following questions:

- What is the goal of this survey?
- Why are you creating this survey?
- What do you hope to accomplish with this survey?
- How will you use the data you are collecting?
- What decisions do you hope to impact with the results of this survey?

Effective surveys and polls are short and focused with simple questions. They follow a logical order with a brief introduction and begin with broader questions followed by those with a more narrow scope. It is best to conclude with questions on demographic data at the end.

Note: There are a variety of online survey tools available to gather input from citizens. To support reliable responses be sure to select a tool that allows one response per IP address (e.g. one response per computer).

Consulting citizens:

Online consultation approaches typically allow individual citizens to respond to municipal solicitation for perceptions and information, perhaps with some sort of municipal response in return. This can allow decision-makers to benefit from citizens' ideas on topics ranging from municipal services to planning, policy and budget decisions.

Such online consultation may be “built-in” (perhaps as a function of a municipal website), be offered as a stand-alone online survey or poll, occur through an online suggestion box or mobile application.

Online consultation can offer municipalities important information to help shape services and decisions while providing citizens with participatory roles and experience in their communities.

Key considerations for consulting with citizens online:

- *Address important design questions.*

Be sure to consider participation and representativeness available through the digital environment. This includes when the intent is “outside the box” thinking about municipal actions or decisions. It also includes when you require more basic information and need to aggregate or rank the input provided.

- *Be clear about how input will be heard and used.*

For any online consultation, outline the decision-maker’s needs and expectations, explain how the offer or request for input fits into any broader engagement process, and let participants know what to expect in terms of responses and actions in the period following their contributions.

It can also be helpful for the municipality to provide identifying information for the administrative personnel charged with receiving input from citizens.

- *Build consultation into the municipality's website.*

A municipal website can be a source and a repository for consultation. This allows participants to both view and use the information provided on the website and to offer their ideas or suggestions.

- *Use surveys and polls.*

Municipalities can use online surveys and polls for a range of purposes. Citizens can be asked to submit ideas, rank service needs, rate performance, or make recommendations on municipal decisions. This can be particularly useful way for municipal officials to understand community concerns and receive guidance on forthcoming actions. As appropriate, providing background information online about the survey topic can help create more informed respondents and make the results more useful.

- *Host special forums or surveys.*

Municipalities may wish to host a special online forum to solicit citizen ideas on an important and timely topic as well as to ask participants to vote on or rank the ideas submitted.

**What's the magic number?
Achieving reliable survey data.**

Reliable surveys reflect a *representative* sample of participants.

But how do you calculate a representative sample? It starts with one fairly straight forward and one less obvious question.

- *How many people are in your population?*
- *How representative of your population do your survey results need to be?*

The reality is that your survey results become more valid as more members of your population are accounted for.

If you take a look at the table below, you'll see that the recommended sample size in the table below gets smaller as your tolerance for inaccuracy – or error – gets larger.

RESPONDENTS NEEDED AT ERROR OF ±3%, ±5%, AND ±10%			
Population	±3%	±5%	±10%
500	345	220	80
1,000	525	285	90
3,000	810	350	100
5,000	910	370	100
10,000	1,000	385	100
100,000	1,100	400	100
1,000,000	1,100	400	100
10,000,000	1,110	400	100

An example to make it clearer

Imagine that you're a municipality of 10,000 citizens and you want to determine how many people are in favour of adopting curbside recycling even if it means an increase in their monthly waste management fees. As a municipality, you decide that you're okay with a five per cent likelihood that you have the wrong impression from citizens. According to the above table, you need to sample 385 people. You discover that 70 per cent of the people surveyed favour curbside recycling and will accept a fee increase. Given that you will accept a five per cent margin of error, you can assume that if every person in your municipality took the survey then the actual proportion that favour curbside recycling would be between 65 per cent to 75 per cent.

If you don't feel confident in these results then you'll need a larger sample of people to participate in your survey. Using the table to the left, you will see that surveying 1,000 people would lower your margin of error to 3 per cent.

Participation v.s. Invitation

It is important to note that the table describes the number of people that you need to actually participate in your survey. The reality is that it can be challenging to achieve high levels of survey participation. It is realistic to assume that a 25 per cent survey response rate is very good. This means that, if everything goes well, you'd need to invite approximately 4,000 people in order to secure 1,000 survey participants.

If you don't know how many people are likely to respond to your survey invitation, it's best to assume a fairly high response rate, like 25 per cent, because it's usually better to invite too few people than too many at first. You can usually invite more.

Source: Kalpana (2011)

Deliberation with and amongst citizens:

Online deliberation approaches allow citizens to communicate with each other electronically through an interactive platform (either synchronously or asynchronously) in order to share views and information as well as develop ideas or recommendations for municipal consideration.

Online deliberation can generate informed and useful input to municipal officials that can result in higher levels of citizen support for the decisions reached. In contrast to opportunities for more limited online comments, feedback or survey responses, the deliberative exchange of information and consideration of trade-offs allow participants to construct more informed and broadly supported recommendations.

Online deliberation may be a stand-alone activity although it is often paired with an in-person technique as a means to secure broader participation.



Key strategies for deliberating with citizens online:

- *Address important design questions.*

Somewhat similarly to the design questions in the consulting section above, municipalities implementing online deliberation processes must grapple with their goals for participation and representativeness, including the desired total number of participants. Other questions impacting design will include the complexity of the issue, the expected level of disagreement and contentiousness among participants, the degree to which the goal is a common or prioritized set of recommendations, and the desired specificity of the recommendations.

- *Plan for participation.*

It is very important that any effort to develop an online deliberative forum has a thoughtful and detailed plan to recruit participants.

Matt Leighninger (2011) of the Deliberative Democracy Consortium suggests three strategies to achieve representative and, as needed, statistically viable participant recruitment:

- Map the networks of possible participants within the community, including those most affected and those who have a personal or special interest in the topic;
- Reach out to leaders within those interested or affected networks, groups, organizations or congregations, and ask the leaders to help recruit participants; and
- Use conversations to develop a recruitment message that will appeal to people's core interests.

- *Develop appropriate online deliberation opportunities.*

As these are typically time and staff intensive efforts, consider the issue or issues facing your municipality and determine which will benefit from online deliberation (or by an online component of an in-person deliberation). This will typically be an issue that is a matter of some controversy, for which an easy or ready solution is not available, and which requires (explicitly or implicitly) an answer to the question, "What kind of community do we want to be?"

- *Ensure facilitation or moderation of discussion.*

In some cases, communication through online forums and discussions will have the potential for rude comments or inappropriate language, anger and personal attacks, or random comments unconnected to the topic. In some way, shape or form, participants must be welcomed, ground rules explained, questions addressed, the process guided, discussions kept on topic, and input synthesized.

- *Combine online deliberation with other engagement opportunities.*

Online deliberation can effectively supplement efforts to inform and involve citizens through other means, from surveys to in-person meetings and community conversations. Online approaches are especially useful to help inform and educate citizens, expand participation opportunities and add to the effectiveness of an overall engagement effort.



TARGETED RECRUITMENT AT A GLANCE

Targeted recruitment refers to the process of defining special interest groups and developing strategies or tailoring specific methods in order to attract participation for a particular citizen engagement activity.

Attracting participants through targeted recruitment provides a number of benefits to municipalities, including:

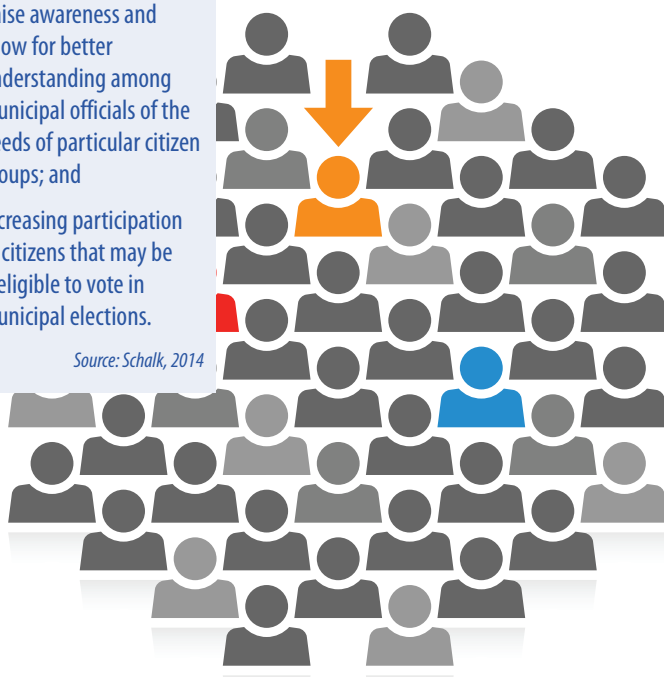
- Encouraging citizens with a direct interest or most likely to be impacted by an issue or decision to have their views and concerns considered in the decision-making process;
- Raise awareness and allow for better understanding among municipal officials of the needs of particular citizen groups; and
- Increasing participation of citizens that may be ineligible to vote in municipal elections.

Source: Schalk, 2014

Recruiting and retaining participants

Citizens have demonstrated increasing expectations to be engaged and municipalities have responded with citizen engagement becoming an increasing facet of governance. With increased expectations and municipalities investing in engagement, citizens also hold a responsibility to become involved. Despite this, attracting participants is one of the most common challenges and issues of municipal citizen engagement.

Traditional methods of engagement, such as town hall meetings, were designed to attract as many participants as possible. More recently, however, municipalities have approached citizen engagement through the use of multiple methods and employing targeted recruitment of participants.



BEST PRACTICES FOR RECRUITMENT

The following four practices can go a long way in effectively and efficiently recruiting the right participants for your citizen engagement activities:

1. Acknowledge the importance of visible core values to people when they come together in community to share their ideas, experiences and expertise.
2. Get clear on who you need to attend and why, and then tailor your recruitment strategies to reach out to those segments of the population.
3. Get to know your target participants. There can be very important reasons that underrepresented groups remain that way. Take the time to understand what would incent or act as a barrier to participation.
4. Be authentic about the reason that you want to engage citizens and purposeful about following up to explain how the citizen knowledge that you have gained as a municipality is being used.

Adapted from Schalk, 2014



Researcher Peter Schalk (2014) found that Alberta municipalities spend 80 per cent of their time planning for citizen engagement, 10 per cent delivering citizen engagement and 10 per cent on post-engagement activities. The limited investment in connecting back to audience post-engagement, particularly to explain how their contributions shaped a decision, can be a significant barrier to future participation.

BEST PRACTICES TO SUSTAIN AND BUILD RECRUITMENT SUCCESS

Citizens who participate in citizen engagement activities will either become ambassadors for your municipality or critics. As a part of both recruitment and engagement activities, the following six best practices can help to generate ambassadors as well as future success for your recruitment initiatives:

1. Make information accessible

Citizens need relevant, timely and plain language information related to the issue or decision at hand. It is critical that they have the appropriate context surrounding the issue or decision, including any bounds to what can be decided, as well as all relevant technical and/or legislative information.

2. Remove barriers

All citizens face potential barriers to participating in citizen engagement projects. Barriers can include everything from balancing commitments, arranging child care, mobility, costs associated with travel and attendance, and limitations around the senses (i.e. hearing, vision, speech).

3. Accommodate citizens

Consider how to most effectively overcome citizen barriers to participation and accommodate your target participants' needs as fully as possible. Accommodations can include choosing easy to access and a central location for in-person meetings, readily available and intuitive technology for digital activities, specific equipment, child care, and much more. When you present citizens with engagement opportunities, be sure to identify how they can request accommodations.

When you fulfill accommodations be aware of costs and, as possible, maintain an in-house list of assistive technologies and services (i.e. screen readers; interpreters) available to support citizen engagement.

4. Provide incentives

Some participants are attracted to citizen engagement due to being directly affected by the issue. Other citizens, particularly those not directly impacted by a decision, can be more difficult to get involved. Incentives, which can vary from snacks to door prizes to honorariums, can make participation more likely.

5. Maintain a contact list

You can sustain citizen engagement by keeping a contact list for people who will readily consent to being contacted about future engagement opportunities. If you are focused on targeted recruitment be certain to keep detailed and relevant information about potential contacts (i.e. gender, age, issues that are of particular interest).

6. Invest in a volunteer program

Create opportunities for members of your municipality to volunteer as part of citizen engagement projects. Not only will your volunteers have networks within the community that can serve as potential participants, it is also a great way to ensure that your municipality has the man power to undertake effective citizen engagement.

Adapted from Schalk, 2014



If you choose to invest in a volunteer program then be sure to arrange the appropriate training (e.g. facilitation) for participants.



Some municipalities are concerned about having the same participants or the community's most vocal participants time and time again. Targeted participant recruitment can be an effective way to determine who needs to be included in citizen engagement and what role citizen participants can and should play in affecting a decision.

3.8.1 Overcoming barriers to citizen recruitment

One of the greatest challenges of citizen engagement is ensuring a representative sample of participants; this is particularly true for populations that tend to be under-represented in citizen engagement projects.

The first step in ensuring adequate representation across populations is proactive planning that focuses on understanding barriers to participants and realistic means of overcoming them.

The following chart describes some of the most common barriers to achieving representation across populations and options to help address them.

Barrier	Brief description of the barrier	Options to overcome the barrier
State of mind/Sense of worth	People from all backgrounds may experience stigma, marginalization and other experiences that affect their self-value and ability to value their contributions to public forums.	<ul style="list-style-type: none"> • Hire or train facilitators skilled with reaching out and drawing people in • Host pre-sessions for specific participants that emphasize a safe space • Select engagement techniques or tools that don't depend entirely on public speaking or other mechanisms that make participants highly visible
Economic	Poverty can affect people's time availability and focus on compensation; it can also reflect socio-cultural limitations or inexperience in public forums.	<ul style="list-style-type: none"> • Consult on the best time for engagement activities • Provide food, child or elder care and other relevant compensation • Hold events near people or, at the very least, public transportation • Work with a network of local community leaders who have built trust • Remunerate for costs incurred or provide an honorarium
Ethno-cultural	Potential participants citizenship status, language abilities and cultural views can be limitations to seeing their place in citizen engagement projects.	<ul style="list-style-type: none"> • Use plain language and ensure that multi-lingual information is accessible to target participants • Consider translating services (written/spoken) • Be cognizant of appropriate venues • Research cultural barriers and respond in-kind
Ability	Everything from access to knowledge to communication can impact the ability for a citizen to participate.	<ul style="list-style-type: none"> • Choose and advertise accessible spaces and services • Set up the space to accommodate mobility • Ask in advance what citizens require (e.g. registration question) • Give sufficient notice • Provide translation services
Legitimacy	Stigmas surrounding age, gender and culture can inhibit participation.	<ul style="list-style-type: none"> • Present information that can be easily understood • Implement facilitation techniques that accommodate participation

Adapted from Schalk, 2014



3.9

Communicating your engagement project

Communication is key before, during and after your citizen engagement project. Identifying how you will present the right information to the right people using the right tools throughout your project is an important element of your citizen engagement plan.

Your communication approach should be generated to supplement the citizen engagement project outcomes. The clearer you are about what you want from your engagement, the easier it will be to communicate.

3.9.1 Communicating the decision-making process

Citizens will choose to get involved in your engagement project if they can relate to the issue or decision at hand. This means that they believe the issue or decision to be made has the potential to impact them, their loved ones, or their community. For this reason, it is important that the citizens inside your municipality understand both the decision being made and the decision-making process that will unfold.

A key component of communicating your engagement project is identifying the decision-making process including the steps to be taken and timelines, who the decision-makers will be and, the responsibilities of both the participants and decision-makers. The reason to share this process is so that both your engagement project team and citizens clearly understand that the engagement project (and corresponding decision points) align with the expected outcomes.

Sample Decision-making Process	Citizen Information Needs
1. Define the issue or opportunity and decision to be made.	1. Clear understanding of the scope of the decision.
2. Gather information.	2. Full range of objective information about the issue or opportunity to be addressed.
3. Establish decision-making criteria.	3. Clear understanding of the criteria by which the alternatives or recommendations will be evaluated.
4. Develop alternatives.	4. Balanced alternatives that include citizen issues and concerns.
5. Evaluate alternatives	5. Clear comparison of alternatives.
6. Make a decision	6. Clear understanding of who made the decision and how citizen issues were considered.

Source: *International Association of Public Participation Manual*, ©2006



There will be times when citizens are involved all the way through a decision-making process and other times when they participate in certain segments. Your decision-making process can act as a valuable communication tool to help inform citizen participants where you currently are in the rollout of the decision-making process. In addition to this, you can update this document to reflect any key realizations, actions and conclusions that emerge during each phase of the decision-making process. A summary of these key realizations, actions and conclusions can help participants effectively enter the decision-making process on cue – with a clear understanding of what has previously taken place and what will happen next.



Each step in the decision process is an opportunity to gain or lose trust. Municipalities can lose trust by not involving citizens until options are already established or worse, a preferred option is already determined, just not “officially” selected.

3.9.2 Key communication considerations

Communication plays an important role throughout citizen engagement. There are a number of formal activities that need to be accounted for as part of citizen engagement.



Social media can be valuable tools to support citizen recruitment and reporting back to the community. Be sure to check the AUMA and AAMDC websites for the [Social Media Resource Guide](#) for additional information and resources.



Communication throughout the citizen engagement project

<p>PRE-WORK</p> <ul style="list-style-type: none"> • Information about the issue • Context • Decision-making process • Citizen recruitment • Invitations to and about engagement activities 	<ul style="list-style-type: none"> • Good information about the issue and decision at hand • Clear information about citizen roles and opportunities to participate • Effective recruitment information and invitations
<p>THE WORK</p> <ul style="list-style-type: none"> • Information about the process • Clear direction on how citizens can affect the decision • Technical and process information 	<ul style="list-style-type: none"> • Clear direction on when and how citizens will receive information and, if relevant, how they will be engaged as part of decision-making process • Relevant information so that citizens are confident that they have the right technical and process knowledge to affect a decision
<p>FOLLOW UP</p> <ul style="list-style-type: none"> • Analysis • The decision • The impact of citizen participation 	<ul style="list-style-type: none"> • Reporting back to citizens with any new information, including any decisions made, how a decision was made, why a decision was made, citizen impact on the final decision and any next steps

BEST PRACTICES AROUND COMMUNICATION

There are several investments that you can make to help with effective communication as it relates to your citizen engagement project.

1. If you plan to use social media, create official social media accounts.

Corporate social media accounts create a consistent and credible place for participants to get information about upcoming engagement opportunities or about municipal issues.

2. Include a citizen engagement page on your website.

You can use a website as a home base for electronic copies of any official citizen engagement documents, including policy, principles, upcoming opportunities to engage and reporting. Your website can also be a great place to house digital engagement tools, such as online polls and discussion forums.

3. Be 100 per cent clear about the boundaries that frame the decision at hand.

Regardless of the stage of the project, be 100 per cent clear on the boundaries that surround each stage of the project and decision-making progress.

One common concern with engagement is that citizens have lofty ideas that are outside of the scope of the project. A second concern is that citizens want to set their own topics for discussion or parameters (i.e. timeline; decision-maker) for the engagement.

By always being clear about the boundaries for the project (i.e. budget; what's up for discussion; what information is needed; what role citizens play in the decision; how and when the decision will be made and implemented) it becomes possible to re-direct people within the transparent and openly described boundaries. Without boundaries then citizens have reason to expect leeway in the process and municipalities have little to back up their efforts to maintain focus.

4. Be clear about how citizens can take initiative to share information with your municipality.

Not every example of citizen engagement has to centre around a formal and current process. There should be ongoing opportunities for citizens to engage with your elected officials and administration. You can provide information about letter writing, emailing, posting comments on websites or participating in social media to citizens.

5. Develop a mailing list to stay in contact with citizens interested in engagement opportunities.

It's important to identify your ambassadors, network, supporters and potential participants. A mailing list is a great way to connect with citizens as well as, in accordance with privacy legislation, keep track of their names, contact info, where they reside within the municipality, and issues or areas of interest.

RESOURCE:
See AUMA and AAMDC's Social Media Resource Guide for additional information



TEN PRINCIPLES OF EFFECTIVE COMMUNICATION THAT CONTRIBUTE TO THE SUCCESS OF CITIZEN ENGAGEMENT PROJECTS:

1. **Be truthful** – Ensure that your content and delivery is honest and accurate
2. **Focus on the fundamentals** – Your content needs to get to the real issues and be clear and easy to digest
3. **Be comprehensive** – Make sure all the relevant information is included; tell the full story
4. **Be consistent** – Strive for alignment in tone, style and truth across all of your municipal communication
5. **Be clear** – Use plain language and logic; organize your content and argument; exemplify and account for various learning styles
6. **Be relevant** – Be clear about why your communication matters to citizens; ensure it address citizen interests, issues, concerns and perceptions
7. **Be accessible** – Information should be easy to find, easy to understand and easy to locate and use.
8. **Be timely** – Provide information early enough so that citizens can take action, ask questions, provide feedback or offer ideas and input
9. **Demonstrate compassion** – Recognize how the issue at hand contributes to citizens' interests, concerns and emotions
10. **Encourage two-way communication** – Feedback loops create opportunities for people to learn, shift perceptions, change their minds, offer new ideas and feel heard

RESOURCE:
Plan your citizen engagement communications



3.9.3 Communication skills that contribute to effective citizen engagement

Communicating information is fundamental to conducting effective citizen engagement projects. While it is possible to communicate without doing citizen engagement, the inverse is impossible. Communication skills are important no matter the level of engagement.

Regardless of who has responsibility for communicating information relevant to the project, the citizen engagement project cannot be effective in the absence of effective communication.

RESOURCE:
Use the Logistical Planning Checklist for In-Person Engagement to identify your “to do” items



3.10

Timelines and resources

Good project management and paying attention to your logistics can go a long way toward the success of your project.

By paying attention to roles and responsibilities, you can ensure that you have just the right number of people with the right skills leading your citizen engagement project. This is particularly true if you are venturing into new territory, such as digital engagement where familiarity with technology and digital facilitation can be imperative.

By getting clear on your timelines, you can ensure that the engagement project team from within your municipality, your potential participants and your location or digital tools are available and able to support your work. You can also determine the relevant lead times for communicating the engagement project (e.g. booking advertisements in the local paper; getting approval for and sending out a news release; coordinating around other announcements in your municipality); coordinating around or in parallel with competing activities; booking facilities and caterers; and ensuring that transportation is running and accessible. You can also set an appropriate budget for your resource requirements.

3.10.1 Developing a project schedule

Your citizen engagement plan needs to contain a detailed timeline of the decision-making process as well as the citizen engagement activities within that decision process.

Information provided to the public and input from citizens needs to be timed so that participants and the general public are provided opportunity to affect the decision-making process.

The *International Association for Public Participation* (©2006) offers four questions that can guide your decisions related to an effective project schedule:

1. Will the municipality be able to respond in real-time to citizens during the process? If not, a system to bridge the gap must be implemented.
2. Are there any fixed or planned milestones in the decision-making process?
3. Are there any legal, legislative or budgetary deadlines being imposed?
4. Are there any lead times involved that are necessary for gathering resources, hiring external support or augmenting the citizen engagement project team's skills?

3.10.2 Roles and responsibilities

The team that you create for your citizen engagement project will have roles that fall into four categories:

1. **Content** – Team members who provide, receive and analyze data (i.e. communications coordinator; subject matter experts; project manager).
2. **Process** – Team members who design and implement the citizen engagement plan and engagement techniques and tools (i.e. project manager; process design specialist; facilitators; digital moderators; logistical coordinator; administrative personnel).
3. **Relationship** – Team members who interact with the participants (i.e. facilitators; digital moderators; elected officials delivering a greeting or information; subject matter experts providing context; interpreters; child care providers).
4. **Support** – People outside of the team who are invited to play specific and specialized roles (i.e. technology providers and specialists; caterers; community hall attendants; graphic designers).

Adapted from Schalk, 2014

It is important to identify who has a role and/or responsibility related to the decision-making process and therefore the citizen engagement plan.

It is recommended that for each citizen engagement project a manager is appointed. This individual will oversee the engagement process and plan and be responsible for tracking progress, completing each engagement activity, and re-evaluating and modifying the plan as changes occur and additional information becomes available.

ROLE OF ELECTED OFFICIALS IN CITIZEN ENGAGEMENT:

- Develop the vision and principles upon which the municipality will engage its citizens;
- Clearly define the scope of decision-making authority associated with the engagement project;
- Ensure impact measures are included in the engagement project;
- Support efforts to educate and enable citizens to participate;
- Encourage and expand diversity of participation;
- Communicate the progress of the engagement project to the public;
- Use citizen input, feedback, recommendations and solutions in decision-making; and
- Communicate the rationale and results of engagement to the public.

It is also recommended that roles for technical staff, other departments, senior management, decision-makers and external resources be identified.

The following represents possible roles and responsibilities within a citizen engagement project.

Role	Activity Description	Responsibilities
Project Manager	Engagement process, content and plan implementation	The project manager ensures there is a plan, that timely preparations are made, and all citizen communications and engagement opportunities are delivered according to the plan. In a perfect world, the project manager does not get involved in the specific tasks of writing public information or facilitating meetings. The project manager is an important liaison between the engagement project team and the decision-makers. The buck stops here: the project manager is responsible for quality control, on-time delivery, and engagement project team effectiveness.
Digital Engagement Coordinator	Engagement content and support	Sets up and manages the project website and social media accounts. Chooses digital engagement tools that work well with internal and external capacity and project goals. Coordinates and oversees website and social media updates submitted by engagement team members, as well as team members responses to citizen input. Works with communications and legal functions to develop principles for how staff, elected officials, and the public should use digital tools, addressing privacy, security, and employee productivity concerns. Facilitates use of digital engagement during meetings. Monitors and evaluates effectiveness of digital engagement campaign.
Subject Matter Expert or External Project Representative	Content and relationship	The expert is the person everyone asks about technical matters or items related to the issue or decision. There can be more than one subject matter expert or project representative. <i>Note: This role should never be shared with the facilitator role to avoid conflict of interest or perceived bias.</i>
Communications	Content	The person(s) who produces the public information necessary to support citizen engagement. Their role includes advertising, media relations, production of written material and display/graphic materials. Often this person manages the website, social media accounts, and digital engagement campaigns if applicable.
Facilitator	Relationship	The facilitator organizes and facilitates meetings and must support a productive discussion or deliberation process in an organized, but neutral manner. The facilitator may be required to identify and mediate points of conflict and is often required to bring together the information from citizen engagement activities and consolidate the ideas in an unbiased manner. This person may use digital engagement tools during meetings.
Recorder / Data Curator(s)	Support and relationship	Often, citizen engagement projects produce a lot of advice and questions. Someone has to record all the information generated and produce a database that allows everyone to see the ideas, questions and concerns generated, and how they have been addressed. This role may also involve attending meetings and keeping a record of those meetings. Ideally, the data keeper(s) provides a single reference source for all citizen input received. An important part of this role is recording all digital engagement, especially interactions with the citizen on social media sites and digital engagement platforms (e.g. IdeaScale, MetroQuest, SurveyMonkey).

Adapted from Alberta Municipal Affairs Public Input Toolkit, 2011

It is important to note that some administrative roles may overlap. For example, the facilitator can also be a data keeper or a communication person. The project manager can also provide communication support to the project. If engaging online, your digital engagement tasks may be given to many members of the engagement project team (*Alberta Municipal Affairs Public Input Toolkit, 2011*).



If you are applying new engagement techniques to your project, consider whether members of the engagement project team need additional training or could benefit from outside expertise. If an intern or temporary employee is leading the day-to-day maintenance of your online presence, ensure that this person will be able to work on the online activity for the duration of the project, or make certain that another member of administration takes over the task so that the online presence continues to be maintained and updated (*Alberta Municipal Affairs Public Input Toolkit, 2011*).

3.10.3 Financial and human resource requirements

Budgeting for citizen engagement is an iterative process. Sometimes there is a starting budget and sometimes there is no budget at all. More often than not, the budget was developed without an understanding of the types of engagement communication and/or techniques and tools that would be implemented.

You will need to work iteratively as you identify target participants, techniques and tools to develop a program that the municipality can afford.



Do not begin a citizen engagement project that requires resources that are not available. If you do, you will not be able to meet the outcomes and will fall short on your promise to citizens, resulting in extreme public dissatisfaction.

Make sure the citizen engagement plan contains detailed budget estimates and align these with funding sources.

Early identification of engagement plan operational needs is also required. It is important to identify and prepare for:

- Potential venues that meet the needs of participants and the selected engagement techniques;
- Facility size and acoustics;
- Audio-visual equipment needs;
- Exhibits/graphics;
- Catering; and
- Staffing requirements for all components of the plan.

Early planning for media relations and media use is also required and includes, but is not limited to:

- Outlets (e.g. TV, Radio, Newspaper);
- Deadlines;
- Format requirements (i.e. advertising, editorials, video);
- Media outlet contacts; and
- Protocol for communicating with media outlets.

Source: International Association for Public Participation, ©2006

RESOURCE: **Use the Roles and Responsibilities Worksheet to clarify who needs to be involved, why and how.**



**The International Association for Public Participation (©2006)
offers 11 questions that can guide your decisions related to a realistic budget:**

1. What resources are available for the citizen engagement project?

2. What are the expected costs for each planned component in the engagement process?

3. How do these costs compare with similar engagement projects we have completed?

4. What are the potential costs of delay due to public protest later in the project?

5. Is the necessary funding currently available? If not, what steps need to be taken to get the necessary funding?



If you choose to engage outside organizations that can

contribute resources then be certain that there is no potential conflict of interest between the organization and the municipality or nature of the issue/decision.

6. What internal staff will be needed at each step in the process and are they available?

7. What outside consulting help is needed and are the resources available to hire them?

8. What resources will citizens need to participate (e.g. parking passes, transportation, translation services)?

9. What resources could citizens or partners provide?

10. Are outside organizations available that might be able to contribute resources?

11. What opportunities exist to integrate citizen engagement with other project activities?

RESOURCE:
**Use the Financial and
Human Resource
Worksheet to guide your
resource requirements and
budget development.**



3.11

Engagement readiness checklist

The following checklist is a snap shot of considerations to determine that you are ready to put your citizen engagement plan into action.

Engagement Readiness Checklist	No	Somewhat	Yes
The issue or decision triggering the engagement has been clearly defined.			
The decision has not been made already.			
There is an organizational commitment to meaningful citizen engagement.			
There is a willingness to respond to citizen input.			
The risks of conducting a citizen engagement process have been assessed and analyzed.			
There are sufficient internal resources (e.g. human, financial) to conduct a meaningful engagement process.			
The questions to be asked or the decision sought from citizens has been identified.			
The potential benefits of conducting a citizen engagement process have been identified.			
There is sufficient time to conduct a meaningful engagement process.			
Citizens are identifiable, accessible and willing to participate.			
An engagement plan has been developed.			
The engagement plan and project schedule has been aligned with the decision-making process and other municipal processes and policies.			
The engagement plan aligns with the municipality's guiding principles for citizen engagement.			

Adapted from The Praxis Group, 2012 and Schalk, 2014

If you answered 'somewhat,' or 'no' to any of the questions above, reflect back on the components of an effective citizen engagement plan and proceed with the necessary adjustments.

RESOURCE:
See the Citizen Engagement Plan template for guidance in developing your plan.





4

Evaluating your citizen engagement efforts

As you implement your citizen engagement plan, you will want to evaluate your progress. Evaluation isn't just about assessing your level of success at the end of a project, it's equally about assessing and improving your engagement work as it unfolds. Your evaluation should focus on two areas:

1. **Tracking the progress of your project.** Even the best laid plans can go awry and you will want your citizen engagement process to feel spacious and flexible so that you can respond to new information (i.e. changes in the environment; changes in direction from decision-makers; input from participants).
2. **Outcome of the project.** Evaluating the overall engagement results will allow you to assess the effectiveness of the project in achieving its stated outcomes.

Evaluation can be extremely meaningful or entirely frivolous. Before you undertake any evaluation, you need to be clear about what you want to evaluate and how it can help you.

More than this, you will want to ensure that your evaluation components are important to your participants, as well as your engagement project team and decision-makers.

SECTION 4

Evaluating your citizen engagement efforts

Some areas to consider for evaluation during and after citizen engagement projects include:

- Effectiveness and efficiency of information and participant recruitment and retention;
- Public satisfaction with the engagement project;
- The appropriateness of the citizen engagement techniques and tools related to the project outcomes;
- The impact of citizen engagement on the decision-making process;
- The impact of citizen engagement on the project outcomes; and
- The actual costs of citizen engagement.

*Adapted from the International Association
for Public Participation, ©2006*

Why do we evaluate?

1. Support continuous improvement in the project.
2. Assess the performance of the project against its desired outcomes.
3. Apply input and learnings to future projects.

Source: International Association of Public Participation, ©2006

There are four components to evaluating your citizen engagement project:

- Set quantitative and qualitative performance measures;
- Select data collection techniques;
- Analyze the data; and
- Report and share results.



If you are considering an evaluation topic, ask yourself: *"Why does this topic matter?"*

Then ask yourself, *"And why does that matter?"* By asking yourself *"why does this matter"* a few times in a row, you can reach a deeper understanding of whether your evaluation focus has meaning for your participants and municipality. Often, people will ask themselves "why" between three and five times to achieve a deeper understanding of the relevance of their evaluation topic.

4.1

Setting performance measures

Performance measures are both an art and a science. For your citizen engagement projects, it makes sense to create performance measures for both your engagement plan (i.e. measures to assess recruitment, logistics, communication etc.) and your engagement impact (i.e. measures to assess the issue or decision at hand, the match between the type of decision to be made and engagement activities, the ability for citizens to effectively support the decision, etc.).

Performance measures can be quantitative or qualitative. For example, if one of your desired outcomes is that target participants have the information they need to deliberate and prioritize possible solutions to the issue, your

measures will include participation level of citizens quantitative input on a scale or qualitative comments that illustrate participant sentiment and feedback. This will help you identify whether the citizens you targeted for participation took part and what their satisfaction was regarding the information you provided to support their engagement.

If your engagement project involves a large number of participants then it is common to engage data collection and evaluation software or to focus on quantitative measures. For smaller engagement projects, or those that focus on questions which require descriptive or narrative contributions, then both qualitative and quantitative performance measures will have merit.

The *Alberta Municipal Affairs Public Input Toolkit* offers sample performance measures and tools for evaluation.



	Content	Quantitative	Qualitative	Impact On
Example Measures	<ul style="list-style-type: none"> • Topics, ideas raised • Themes of the opinions in general • Themes of the opinions by target participants, by geography, etc. • Unique ideas 	<ul style="list-style-type: none"> • Number of participants (total by engagement technique and tool) • New participants in the process • Website visits, social media interactions • Costs of engagement including non-monetary 	<ul style="list-style-type: none"> • Participant satisfaction • Quality of participant interactions • Participant desire to stay involved • Participant sentiment • Participant learning • Staff satisfaction and learning 	<ul style="list-style-type: none"> • Elected officials, senior administration, key project partners • Policies and programs • Participants • Municipality and other organizations • Project team members
Example Tools	<ul style="list-style-type: none"> • Weekly manual summary (and highlights) of content patterns and trends • End of project workshop to analyze data collected from all techniques and tools 	<ul style="list-style-type: none"> • Participant survey or questionnaire • Participant attendance or digital participation levels • Reports from digital engagement tools • Social media reports • Website analytics • E-newsletter open and click through rates • Budget analysis 	<ul style="list-style-type: none"> • Participant surveys and interviews • Key staff debrief survey and discussions 	<ul style="list-style-type: none"> • Participant interviews • Surveys/questionnaires before, during immediately after and some months after the process • Policy analysis • Project team debrief

WHY DO WE EVALUATE?

1. Support continuous improvement in the project.
2. Assess the performance of the project against its desired outcomes.
3. Apply input and learnings to future projects.

Source: International Association of Public Participation, ©2006

Too often, evaluation opportunities are overlooked or started too late to make any improvements along the way.

There are four components to evaluating your citizen engagement project:

- Set quantitative and qualitative performance measures;
- Select data collection techniques;
- Analyze the data; and
- Report and share results.

4.2

Data collection techniques

Evaluation does not have to be fancy or formal to be effective. To choose the most effective evaluation techniques, consider:

- Are people more comfortable sharing their suggestions for improvement in a group, one-on-one or privately?
- How much time do we have available?
- At what junctures might we require formal v.s. informal assessments?

With this information, consider and choose amongst the following techniques:

Data collection techniques and considerations

Delivery Mode	Technique	Description	Considerations
In-person	Round-table	Opportunity for everyone to formally or informally provide input	<ul style="list-style-type: none"> • Everyone has an opportunity • Can take time • People may not feel comfortable • Participants can build on other's contributions • Works digitally and in-person
In-person	Popcorn style	Participants choose whether to share a verbal contribution	<ul style="list-style-type: none"> • Goes quickly • No limitations around time • Participants determine if they have anything to share • People may not feel comfortable • Participants can build on other's contributions
In-person	Interviews	One-on-one opportunity to garner input	<ul style="list-style-type: none"> • Can be formal or informal • Can take time • Not transparent to others; requires analysis and reporting by interviewer • No opportunity to build on other's contributions • Great for narratives and deep-dives
In-person or Digital	Surveys	The measure of opinions or experiences of a group of people through the asking of questions	<ul style="list-style-type: none"> • Can provide statistical validity • Can be quantitative, qualitative or both • May require an expert statistician or survey designer • Can be delivered on paper or digitally • Explore the survey software features to ensure you are able to limit responses to one computer
In-person or Digital	Observation	The engagement project team or an external representative observes comments and interactions of participants	<ul style="list-style-type: none"> • Focuses on qualitative evaluation • Relies on observer interpretation of sentiment
In-person or Digital	Questionnaires	On-paper or digital questions to garner written assessment Note: Questionnaires can be used as part of surveys	<ul style="list-style-type: none"> • Can be quantitative, qualitative or both • Best when short and to-the-point • Can be used periodically or at the end of an event • Available to everyone • Level of input varies substantially according to the care given by the participant • Not transparent unless laid out for others to view • No opportunity to build on other's ideas • Explore the survey software features to ensure you are able to limit responses to one computer
In-person or Digital	Peer evaluations	Other citizens sit in on an engagement technique to provide feedback	<ul style="list-style-type: none"> • Limits the impact on your participants • Considers an external perspective • Limits the experiential input • Limits participants from feeling valued and that their voices make a difference in the engagement • Requires time into careful planning
In-person or Digital	Third-party program	A third-party evaluator conducts a formal evaluation of one or more elements	<ul style="list-style-type: none"> • High level of expertise • Can tailor toward the design, plan and implementation • Can incorporate participant experiences • Best used to evaluate and learn from the project rather than make adjustments during the process



Involving citizens in designing and conducting evaluation is a valuable means to create a transparent engagement project.

When it comes to citizen engagement evaluation, the best assessments will always come from citizens themselves. They are your target participants and will have the greatest insight into how your municipality can meet their needs.

When it comes to enhancing projects underway:

1. Let participants know that you want their input to enhance their experience.
2. Build in explicit check points to ask participants how they are experiencing the process.



Given the variety of ways you can gather feedback, it is important that you match the data collection technique with your selected performance measure to ensure you get the data you want.

Example:

Engagement Objective	Target participants have the information they need to deliberate and prioritize possible solutions to the issue.	
Performance Measures	<ul style="list-style-type: none"> • Participation level of citizens (quantitative) • Participant satisfaction with the information provided (qualitative) 	
Data Collection Tools	Quantitative	Qualitative
<ul style="list-style-type: none"> • Interviews (In-person) • Roundtable (In-person) • Popcorn style (In-person) • Survey or questionnaire (In-person or digital) • Observation (In-person or digital) 	<ul style="list-style-type: none"> • Attendance/Sign-in sheet at in-person engagement activity • Number of participants through digital engagement activity • Website, social media and/or digital engagement tool analytics 	<ul style="list-style-type: none"> • Participant questionnaire or feedback form • Informal chats with participants • Observations of participant activities in-person or online • Sentiment of digital comments/feedback

4.3

Analyzing the data

Conduct analysis of data and interpret results based on the desired outcomes in the citizen engagement plan. The analysis of the data may vary based on the amount collected, the data collection techniques, the needs and interest of targeted participants and the amount of time to complete the evaluation. The analysis may also range in complexity - from assessing comments and feedback provided by participants to statistical calculations.

When analysing qualitative data, it may be beneficial for municipalities to categorize similar responses or feedback provided by participants. Taking this approach provides an opportunity to analyze the common responses or feedback as well as the number of participants for each categorized response or feedback.

For surveys with quantitative information, municipalities should calculate the confidence interval. The confidence interval provides an indication of how accurate the results are of those who responded, or the sample, compared to the larger population (Schalk, 2014).

The analysis of information received from an engagement project can be a challenge for municipalities. Qualitative evaluation techniques are a useful approach to categorize and analyse information received. Municipalities may find it beneficial to develop a plan or process to categorize and analyse information received and involving participants may be beneficial to increase transparency. The *Considerations and tips to analyze your data* chart provides questions and tips on how to approach the analysis of information received.



A confidence interval is not necessary if a census survey was used; meaning everybody of a particular population of interest (e.g. youth) is provided the survey.



A beneficial way to conduct the analysis would be to form an evaluation team to provide feedback on or conduct the analysis. This group ensures the analysis is not biased or limited to the viewpoint of the individual(s) conducting the analysis.



Considerations and tips to analyze your data

Questions to consider	Tips
How will data from the engagement project be sorted and analyzed?	<ul style="list-style-type: none"> Review your roles and responsibilities during the planning stage Consider having participants sort and theme information they are providing as part of the engagement activity
What is the process to identify themes, key priorities, etc.?	<ul style="list-style-type: none"> Depending on the technique chosen, extracting the necessary data will not be the same for each Consider involving participants
How will you handle issues outside the scope of the issue or decision at hand but which may have relevance or importance for participants?	<ul style="list-style-type: none"> Be sensitive to the opinions and thoughts of all participants but reinforce the desired outcomes in the engagement project
How will you report the summary of the data back to participants?	<ul style="list-style-type: none"> An important component of this communication is establishing a time frame for the decision and how the data will be used in the decision-making process
How does the data inform the decision?	<ul style="list-style-type: none"> Have a plan, stick to it!
How will decision-makers receive the data?	<ul style="list-style-type: none"> Have this planned out before the session begins

Source: Capital Health Nova Scotia, n.d.

BEST PRACTICES FOR EVALUATION

The following reflect best practices for evaluating citizen engagement:

1. Evaluation for citizen engagement should be integrated into the planning process.

Defining the evaluation process should occur alongside the process to plan for citizen engagement. Many of the elements defined in the planning process (e.g., defining the desired outcomes as well as the context surrounding the citizen engagement technique and tool) will drive and influence the types of questions and data collection to be used for the evaluation. Like planning for citizen engagement, evaluation is a structured and systematically planned process to ensure clarity on outcomes, purpose, process and define deliverables.

2. Evaluation should serve as an extension of citizen engagement and be a participatory activity.

Evaluating citizen engagement should be a participatory and collaborative activity that identifies roles and responsibilities for those participating, municipal officials and, interested others (e.g. special interest groups or project partners). Participants, municipal officials and project partners all play a key role and act as sources for collecting data to evaluate whether citizen engagement achieved its desired outcomes.

3. The evaluation process should adapt to the scale, scope and complexity of the citizen engagement activity.

Citizen engagement projects will vary in scale, scope and complexity. They may occur on a single date or over months – perhaps years – using multiple techniques and tools. With this in mind, municipalities should conduct an evaluation that is tailored and meets the needs of the municipality, as defined by the desired outcomes in the citizen engagement project.

Source: Schalk, 2014

4.4

Reporting and sharing results

Researcher Peter Schalk (2014) estimated that 80 per cent of the time that Alberta municipalities dedicate to citizen engagement goes into planning activities. This means that only 20 per cent is allocated to implementing engagement, evaluation and reporting back to decision-makers, participants and the public. The reality is that post-implementation evaluation and reporting is often overlooked, downplayed or given very little time. Often, given an urgency to wrap up a project, there is a huge push to provide decision-makers with the information that they require to make the decision. However, taking this approach can be detrimental to future engagement activities. The reason is that while decision-makers are one audience imperative to successful citizen engagement, future engagement activities depend on satisfaction of participants and interested members of the public as well. This is where the role of reporting to decision-makers as well as participants and the public becomes imperative.

Effective reporting to the public and specifically target participants, should include:

- What decision(s) was made
- Why that decision(s) was made
- How participant input was applied to the decision

It is worth preparing an internal report on the citizen engagement project to support knowledge sharing and best practices for the municipality.

Key elements of an internal report should include:

- Overview of issue or decision to be made
- Desired outcomes of the project
- Process description
- Successes and challenges
 - Techniques and tools applied
 - Venue, time and location
 - Satisfaction levels with both the process and outcomes
 - Unexpected outcomes
 - Summary of costs and required resources

Adapted from the Strathcona County Engagement Framework

The information that you choose to share with decision-makers, participants and the public should be part of your Citizen Engagement Plan. As a municipality, you have a number of options available to release your project results and any decisions made a result of citizen engagement. These can include:

- Media-related reporting mechanisms (i.e. news and press releases);
- Research reports and publications;
- Academic or professional publications and/or events (e.g. conferences);
- Internal capacity building activities (e.g. case studies), and
- Presentations, workshops or seminars.

Source: Schalk, 2014



The more transparent the citizen engagement analysis and decision-making, the easier the reporting work. The reason is that 'black box' analysis, where informed is collected out of the eye of decision-makers and the public and analyzed by experts, and backroom decision-making begs all sorts of questions. It is easy for affected parties to be sceptical of the data, the analysis and how it is reported. However, techniques like live-analysis, where skilled facilitators are able to theme out and analyze any data as it comes in, and public deliberation make it possible for everyone to understand how decisions are made and verify all the inputs as well as the output. In this case, the role of reporting is to broadly share rather than justify this information.

RESOURCE:
Use the Evaluation Report Template to guide the development of your report.



For a report to be released to the public, it should be written in clear and plain language, and should avoid any technical terminology. A general rule of practice is for the report to be written at a Grade 8 reading level to ensure the public can easily understand the findings. To ensure this, if available, a communications professional should review a draft report prior to public release.

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RESOURCE GUIDE

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Worksheet 2	Evidence you require for a citizen engagement policy Citizen Engagement Administrative Policy Template
Worksheet 3	Internal and external expectation assessment
Worksheet 4	Aligning the engagement topic with target participants
Worksheet 5	Selecting your level of engagement
Worksheet 6	Roles and responsibilities
Worksheet 7	Financial and human resource considerations Communications Plan Template Citizen Engagement Plan Template Citizen Engagement Toolkit Glossary

WORKSHEET 1

Understanding risk

The value of a SWOT analysis is that it maps the internal strengths and weaknesses of a municipality as well as the opportunities and threats facing the organization. In this context, the SWOT analysis is considered through the lens of citizen engagement.

Technique for Conducting a SWOT

Divide a whiteboard or piece of paper into three sections. Each section denotes a one-year time period for your municipality. Looking back over the three years, consider any activities that constitute citizen engagement – regardless of their outcome – and map them on the timeline.

Year One	Year Two	Year Three

Using writing instruments of two different colours, review your contributions to the timeline and denote each event as a high/positive or a low/negative. If you prefer, rank each event on a scale of one to 10, with one indicating a highly negative outcome and 10 indicating a highly positive outcome.

Now, in reviewing the events, identify common themes that contributed to the highs, lows or both.

This is your data.

Now divide a whiteboard or piece of paper into a matrix with six quadrants to create a SWOT tool to analyze your data. The top two lines are labels to denote an internal context and an external context. The bottom four lines require ample space for brainstorming. On the left side, under the internal context, are the headers *Strengths* and *Weaknesses*. On the right side, under the external context, are the headers *Opportunities* and *Threats*.

Understanding risk

INTERNAL	EXTERNAL
<p>Strengths:</p>	<p>Opportunities:</p>
<p>Weaknesses:</p>	<p>Threats:</p>

Look at your data, and allocate five minutes to each of the following for conversation:

Internal context, STRENGTHS: What strengths do we rely on to conduct citizen engagement? Which strengths do we possess but overlook or ignore?

Internal context, WEAKNESSES: What have been our pitfalls? How do we deal with them? What have we done or can we do about them?

External context, OPPORTUNITIES: What opportunities have been available to us? Which did we capitalize on and why? Which did we overlook and why?

External context, THREATS: What has challenged us to deliver our best citizen engagement opportunities? What are we afraid of? What barriers need to be removed?

Review your answers to the SWOT analysis and consider: How can we behave in the future to capitalize on our strengths, overcome our weaknesses, benefit from our opportunities, and challenge our threats?

WORKSHEET 2

Evidence you require a citizen engagement policy

Consider the following set of questions, and answer yes, no, or unsure. Be truthful about your responses. Tally the number of responses in each column.

QUESTION	YES	NO	UNSURE
Are Council and senior administrative leaders satisfied with current citizen engagement practices?			
Does Council feel it has the right and necessary information on the views, experiences and expertise of citizens as part of its decision-making processes?			
Can you describe the common set of values guiding the municipality's citizen engagement activities?			
Is there a process to plan for and implement the municipality's engagement activities?			
Is there a clear understanding of the role that citizen engagement plays for Council and administration?			
Is there a clear understanding of the type of decisions that citizen engagement can support?			
Are a variety of methods and approaches being used to engage citizens?			
Do citizens have information to engage with the municipality in a meaningful, effective and efficient way?			
Is the municipality successful in identifying and recruiting participants potentially affected by decisions?			
Is it clear to citizens how their participation in engagement activities is influencing public policy and decision-making?			
TOTALS			

Your responses in the **YES** column indicate that things are working well. Your responses in the **NO** column point to issues that can potentially impact the value and outcomes of citizen engagement. Your responses in the **UNSURE** column indicate that more information (likely through conversation) is necessary to determine if there is an issue that can potentially impact the value and outcomes of citizen engagement.

If you answered **NO to between three and six questions**, it is time to consider the value of creating a public engagement policy. If you answered **NO to more than six questions**, it is very likely that your citizen engagement activities are suffering due to the lack of or limitations of a citizen engagement policy.

If you answered **UNSURE to more than three questions**, it is important to gain a better understanding of the value of your citizen engagement activities. You may be investing in activities that are not generating a solid return for your time and resources. More than this, ineffective citizen engagement can actually be detrimental to citizens' trust in and respect for local government.

If you answered **YES to six or more questions** then you are on the right path. If you haven't created a civic engagement policy then it may be time to invest in documentation to ensure that everyone shares the same understanding of your citizen engagement activities. Documenting policy is also an excellent practice to support corporate memory and culture when there is turnover amongst elected officials and administrative staff.

Citizen Engagement Administrative Policy **TEMPLATE**

Relevant Legislation: List relevant legislation, for example: *Municipal Government Act (MGA)*, *Alberta Freedom of Information and Privacy Protection Act (FOIP)*, *Alberta Personal Information Protection Act* and/or implications on existing municipal policies (i.e. employee conduct, security, safe workplace, technology use, communication protocols, etc.).

Policy Objective: A description of what a citizen engagement policy seeks to address.

1.0 Purpose Explain the intent of the policy.

2.0 Definitions Define citizen engagement and key terminology.

3.0 Responsibilities Identify relevant staff positions with accountability, administrative and implementation responsibilities.

4.0 Municipal Commitment Statement to Citizen Engagement A commitment statement that shares the municipality's philosophy on citizen engagement.

APPENDIX RESOURCES

Citizen Engagement Administrative Policy TEMPLATE

5.0 Citizen Engagement Standards Identify standards that address how the municipality will work with citizens beyond the requirements outlined in the *Municipal Government Act*.

6.0 Citizen Engagement Management Describe expectations around managing the design, planning, implementation and evaluation of citizen engagement activities.

7.0 Citizen Conduct Describe acceptable conduct of citizens participating in citizen engagement activities (e.g. Conduct guidelines and Terms of Use for digital engagement).

8.0 Citizen Engagement Framework Describe the municipalities framework for engaging citizens to clarify when, how and why the municipality will engage with its citizens. The framework should acknowledge citizen engagement activities mandated by the *Municipal Government Act* while also describing activities beyond the legislative requirements.

9.0 Evaluation and Reporting Describe processes and practices that will be used to keep citizens informed of the progress of engagement activities and resulting decisions.

Internal and external expectation assessment

ASSESSING INTERNAL EXPECTATIONS

NOTE: You may wish to apply additional questions that are important to your municipality to increase the usefulness of these worksheets.

Directions:

Place a check mark in the appropriate boxes for questions one through eight. Then follow the instructions in the left column.

Score indicates:

1-2: Very Low to Low

2-3: Low to Moderate – recommendation: at least to **CONSULT**

3-4: Moderate to High – recommendation: probably **INVOLVE**

4-5: High to Very High – recommendation: minimum **INVOLVE**, consider opportunities to **COLLABORATE** or **EMPOWER**.

Assessment Questions	Very Low	Low	Moderate	High	Very High
1. What is the legally required level of citizen engagement?					
2. To what extent do internal staff believe that the citizenry could help improve the outcome of the issue or opportunity?					
3. At what level do internal staff perceive citizen interest in this issue or opportunity?					
4. What is the potential for the citizens to influence the decision-making process?					
5. What level of media interest do you anticipate?					
6. What is the likelihood that decision-makers will give full consideration to citizen input?					
7. What levels of resources are likely to be available to support citizen engagement?					
8. What is the anticipated level for political controversy?					
Count the number of checks in each column.					
Multiply number of checks by the weight	x 1	x 2	x 3	x 4	x 5
Enter column score					
Add total of all five column scores					
Divide total score by the number of questions	/ 8				
Average score					

Very Low to Low (1-2): Work with key citizens and special interest groups to identify a comprehensive information program to satisfy citizen concerns.

Low to Moderate (2-3): Citizen engagement is probably a good idea. Consider how the **CONSULT** level will work with the issues and interests of the citizens and special interest groups.

Moderate to High (3-4): Consider participation at least at the **CONSULT** level and probably at the **INVOLVE** level.

High to Very High (4-5): Evaluate how citizen issues and interests and internal considerations can best be accommodated at the **INVOLVE** or even move to the **COLLABORATE** or **EMPOWER** levels.

NOTE: If any questions were registered at the **Very High** level, careful evaluation should be given to the level of citizen engagement, even if the average score was otherwise **Low**.

Source: International Association of Public Participation, ©2006

WORKSHEET 3

Internal and external expectation assessment

ASSESSING EXTERNAL EXPECTATIONS

NOTE: You may wish to apply additional questions that are important to your municipality to increase the usefulness of these worksheets.

Directions:

Place a check mark in the appropriate boxes for questions one through five. Then follow the instructions in the left column.

Score indicates:

1-2: Very Low to Low

2-3: Low to Moderate – recommendation: at least to **CONSULT**

3-4: Moderate to High – recommendation: probably **INVOLVE**

4-5: High to Very High – recommendation: minimum **INVOLVE**, consider opportunities to **COLLABORATE** or **EMPOWER**.

Assessment Questions	Very Low	Low	Moderate	High	Very High
1. What is the probable level of difficulty in addressing the issue/opportunity?					
2. What is the potential for citizen outrage related to the project?					
3. How important are the potential impacts of the issue/opportunity to the public?					
4. How much do major stakeholder groups care about the issue/opportunity to be addressed and decision to be made?					
5. What degree of engagement do citizens appear to want?					
Count the number of checks in each column.					
Multiply number of checks by the weight	x 1	x 2	x 3	x 4	x 5
Enter column score					
Add total of all five column scores					
Divide total score by the number of questions	/ 5				
Average score					

Very Low to Low (1-2): Work with key citizens and special interest groups to identify a comprehensive information program to satisfy citizen concerns.

Low to Moderate (2-3): Citizen engagement is probably a good idea. Consider how the **CONSULT** level will work with the issues and interests of the citizens and special interest groups.

Moderate to High (3-4): Consider participation at least at the **CONSULT** level and probably at the **INVOLVE** level.

High to Very High (4-5): Evaluate how citizen issues and interests and internal considerations can best be accommodated at the **INVOLVE** or even move to the **COLLABORATE** or **EMPOWER** levels.

NOTE: If any questions were registered at the **Very High** level, careful evaluation should be given to the level of citizen engagement, even if the average score was otherwise **Low**.

Source: International Association of Public Participation, ©2006

Internal and external expectation assessment

To summarize the internal and external expectations use the matrix below to help create a visual overview of the results. Plot the level as it was assessed for the internal and external audiences to help identify your level of engagement.

Expectations	Inform	Consult	Involve	Collaborate	Empower
1. What level of citizen engagement was forecast by the municipality prior to doing the internal assessment?					
2. What level of citizen engagement do citizens and special interest groups desire and/or expect?					
3. What level of citizen engagement do managers and technical staff support?					
4. What level of citizen engagement do decision-makers support?					

Based on your evaluation of the internal and external expectations, what level of citizen engagement from the Spectrum of Engagement (See 1.1.3 *The engagement spectrum today*) would be appropriate?

Are there some benefits and opportunities for some elements of the engagement process to be at a higher level on the spectrum? If so, what might they be?

Source: International Association of Public Participation, ©2006

Aligning the engagement topic with target participants

A comprehensive understanding of issues or opportunities and the citizens and special interest groups will help you in your next step of selecting the level of engagement for your process and developing your citizen engagement plan.

This worksheet is designed to help you identify areas where shared understanding exists and where diversity exists between the target participants and their perceptions on the engagement topic. The content and results may assist you in targeting resources and activities to areas of importance in your engagement plan.

To use the table:

- List each **ISSUE** as identified through your values and perception audit. If past commitments to citizens and special interest groups were made related to the issue or opportunity then note these as an issue.
- From the perspective of the municipality, identify the level of impact the decision is likely to have.
**Remember impacts can be positive as well as negative.*

Use the following scale:

N = None

L = Low

M = Moderate

H = High

U = Unknown

- List potential citizens and stakeholders for each issue. These may be repeated for different issues. The list may be in broad strokes, such as property owners, and/or be more specific such as property owners intending to sell as a source of retirement income. In some cases, the extra detail will clarify specific groups and individuals that may drive your engagement communications.
- Rate the **LEVEL OF CONCERN** for each issue held by each citizen or special interest group as best you can. Remember the level of concern relates to the level of perceived impact.

Use the same scale as for the ISSUES.

- In the column marked "Geographic Frame of Reference", note your understanding of the citizen's and special interest group's geographic area of interest. For example, one group may be associated with a particular neighbourhood while another is community-wide and a third covers the region.
- In the "Contacts" column, list any individuals and organizations who represent that citizen's interest.

Aligning the engagement topic with target participants

Issue	Municipal Evaluation – Level of Impact: N = None L = Low M = Moderate H = High U = Unknown	Citizens/Special Interest Groups			
		Citizens/ Special Interest Groups	Level of Concern: N = None L = Low M = Moderate H = High U = Unknown	Geographic frame of reference	Contacts
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					

Source: International Association of Public Participation, ©2006

WORKSHEET 5

Selecting your level of engagement

To assist with narrowing the particular level of engagement, as a project team indicate your level of agreement to each question below using a 5 point scale, where **1 is strongly disagree** and **5 is strongly agree**. One completed calculate the score at the bottom.

Question: *Insert proposed citizen engagement for the project or issue.*

Scope	1	2	3	4	5
Has a size or complexity that can be considered significant?					
Could potentially impact a large number of citizens?					
Could potentially impact people located in a number of different areas within the municipality?					
Will affect a wide range of citizens?					
Complexity					
Can be considered unique and challenging?					
Will require a number of stages and/or components?					
Will see citizens have a number of strong and differing opinions for the project or issue?					
Concern					
May be connected to any significant past issues or poor relationships with citizens?					
May create or increase any health or safety risk?					
Result in an unfair advantage (i.e. create "winners")?					
Could be an emotional or moral "hot button"?					
In past engagements has resulted in tension and controversy?					
May have an impact on taxes or fees collected by the municipality?					
Impact					
Will decrease property values or increase taxation levels or fees?					
Will create undesirable aesthetic changes (e.g. view, odour, noise)?					
Will interfere with daily lifestyle and habitual patterns of people (i.e. loss of access, congestion, restriction of activity)?					
Will interfere with rights or entitlements for certain community members?					
<i>Step 1 – Count the number of checkmarks in each column</i>					
<i>Step 2 – Multiply the number of checkmarks by weight for each column</i>					
	1X	2X	3X	4X	5X
<i>Step 3 – Include the result from step for each column</i>					
<i>Step 4 – Add the total of the weighted scores</i>					
<i>Step 5 – Divide by 17 to determine the average score</i>					
Average Score					

Selecting your level of engagement

INFORM Score: 1.0-1.9	CONSULT Score: 2.0-2.9	INVOLVE Score: 3.0-3.9	COLLABORATE Score: 4.0-5.0	EMPOWER Score: Generally above 4.0 and recommended to obtain approval from Council
Inform refers to the provision of balanced and objective information that provides the background, opportunities and risks related to an issue, project or policy	Consult with citizens to receive feedback and analysis	Involve citizens directly to ensure public concerns or support is adequately reflected	Collaborate with citizens throughout the decision-making process to co-design solutions that reflect public concern or support	Empower citizens to take the lead and hold final decision-making power

Source: Schalk, P. (2014).

Communications Plan **TEMPLATE**

Citizen Engagement Communications Plan		Responses
1. Desired engagement outcomes	Why are you engaging with citizens? What will your citizen engagement achieve?	
2. Desired communications outcomes	What do you want citizens to feel or do to help achieve your engagement outcomes?	
3. Barriers	What is currently standing in the way of your engagement and communication outcomes already being realized?	
4. Target audience	Who will benefit the most from communication? Who can help you to achieve your desired outcomes?	
5. Key messages	What do your target audiences need to know to help you achieve your desired outcomes?	
6. Tactics	What will have the biggest impact on your target audience? (i.e. stories, messages, visuals)	
7. Tools	What communication tools are the most efficient and effective to reaching out to your audience?	
8. Evaluation	How will you know that your communication efforts have contributed to your engagement and communication outcomes?	

Roles and responsibilities

Use this worksheet to identify key roles and responsibilities for the implementation of the citizen engagement project.

NOTE: This worksheet may need to be revisited as you progress through the decision-making process and engagement plan.

Roles	Specific individuals in these roles	Responsibilities of each individual for this step
1. Who has overall management responsibility for citizen engagement?		
2. Who are the citizen engagement staff for this project?		
3. Who are the technical staff for this decision? (e.g. planners, developers, information technology department).		
4. Who are the key managers for this decision?		
5. Who are the individuals who control the resources?		
6. What individuals outside the decision-making process may be important to the credibility of the citizen engagement project?		
7. What internal resources with special expertise will be important to the process, such as graphics support?		
8. What outside resources with special expertise will be important to the process, such as independent technical experts?		

Adapted from International Association of Public Participation, ©2006

WORKSHEET 7

Financial and human resource considerations

Category	Items to Consider	Estimated Cost
Human Resources	Staff time	
	Hiring a student	
	Citizen champions	
Advertising and Communications	Recruitment incentives (e.g. prizes, transportation vouchers)	
	Advertising (e.g. newspaper, television, radio)	
	Branding of the project (e.g. graphic design and copy-writing)	
	Translation services	
	Telephone hotline	
	Printing and print materials (e.g. posters, brochures)	
	Display materials (e.g. presentation booth)	
	Mail-outs	
In-person Techniques/Tools	Room/facility rental fee	
	Tables and chair rental	
	Tablecloth rentals	
	Outdoor tent rentals	
	Catering (i.e. food and beverage)	
	Materials (e.g. registration sheets, nametags, flip charts, easels, pens, markers, sticky notes, paper)	
	Material development and printing (e.g. brochures, display boards, signs, posters, discussion guides, workbooks)	
	Specialized tool development (e.g. design charrette materials)	
	Recruitment incentives (e.g. honorarium, child care)	
	Specialized facilitation services (e.g. external facilitator, graphic facilitator, youth engagement specialist)	
	Transportation vouchers for participants and/or staff	
	Transcription services	
	Audio-visual equipment rental (e.g. projector, screen, sound system)	
Digital Techniques/Tools	Hardware (e.g. laptops, projectors, iPads, mobile phones, kiosks)	
	Video camera, camera, digital recorder	
	Website (i.e. creation of stand alone or addition of project information to existing website)	
	One-time annual or monthly costs for other digital tools	
	Staff time to set up digital tools	
	Public education sessions on tools	

Other Items _____

Adapted from Alberta Municipal Affairs Public Input Toolkit, 2011

Financial and human resource considerations

Logistical Planning Checklist for In-Person Engagement

Location Criteria	Accessibility	AV	Laptop
	Transit accessibility/timing		Wireless mouse
	Adequate, safe and convenient parking		Remote presentation clicker
	Easy to find/provide directions		Laser pointer
	Recognized as a meeting place		Projector
	Proximity to subject of discussion		Audience response system equipment (e.g. voting)
	Sufficient chairs/tables		Recording devices
	Sufficient AV		Camera
	Insurance		Microphones
	Cost of site to use		Microphone runners (people to move around room with microphones)
	Space for child/elderly care		Screen
	Requirements for refreshments/catering		Speakers
	Room Criteria		Sound/noise level
Accessibility		Internet access	
Occupancy capacity		Extension cords	
Sufficient for meeting format			
Sufficient AV		Office Supplies	Pens, pencils, markers
Sufficient power supply			Post-It notes
Lighting			Sticker dots (voting)
Break-out rooms			Stapler
Materials	Space for officials/observers/media		Tape
	Invitation to participants		Scissors
	Directions to site		Rubber bands
	Signage		Paper clips or binders
	Agenda/Instructions	Tools - screwdriver, hammer	
	Presentations/speeches	Extra notepads	
	Room Layout	Butcher block paper	
	Muster point and emergency instructions	Flip charts	
	Sign-in Sheets	Easels	
	Name tags	Kleenex	
	Hand outs	Tablecloths	
	Table numbers		
	Boards/maps/illustrations		
	Evaluation forms		
	Directional signs		
	Comment forms and boxes		
	Games or other		
	Refreshments (inc. plates, utensils, napkins, cups, etc.)		

APPENDIX RESOURCES

Citizen Engagement Plan TEMPLATE

Municipality Name/Logo:

Project:	
Lead Department:	
Project Manager:	
Consultant <i>(if applicable):</i>	
Other Project Partners <i>(if applicable):</i>	
Background <i>(Description of the overall project or issue):</i>	
Core Values Guiding and Principles: <i>Identify the engagement values and principles that will guide the project</i>	
Guiding Principles:	
Issue or decision to be made:	
Decision-maker(s):	
Impact of issue or decision: <i>Description of the scope and complexity of the issue or decision</i>	

Citizen Engagement Plan TEMPLATE

Type of decision to be made:	Directive	Consultive	Deliberative	Participatory	Citizen Led
Project Timeline: <i>Description of phases and date for decision to be made</i>					
Lead Department: <i>Describe the rationale for engaging citizens and engagement including the principles or values guiding the engagement</i>					
Engagement Outcomes: <i>Identify S.M.A.R.T. outcomes</i>					
Target Participants	Internal Participants			External Participants	
Level of Engagement	Inform	Consult	Involve	Collaborate	Empower
Techniques and Tools: <i>Identify tools related to the level of engagement and target participants</i>	Internal Participants			External Participants	
Citizen Recruitment Methods					
Communication Plan	Target Audience	Key Messages	Timelines	Communication Tools	

APPENDIX RESOURCES

Citizen Engagement Plan TEMPLATE

<p>Data Management: <i>Describe how citizen input will be recorded/managed and integrated into the planning process</i></p>	
---	--

Financial and Human Resources	Budget	Item	Estimated Cost	Funding Source(s)

APPENDIX RESOURCES

Evaluation Report **TEMPLATE**

Executive Summary *Describe the project, engagement process, outcomes, target audience, and overview of results.*

Background *Provide an overview of the issue or decision to be made.*

Engagement Process *Describe the number and range of participants, the quality of participation, techniques and tools (in-person and digital) used in the project.*

Findings *Provide an overview of the results for each engagement technique and tool applied. This should be a summary of the quantitative and qualitative data collected in-person and digitally during the project.*

Results and Recommendation *Provide an analysis of the findings and results.*

Appendices *Share any available data from in-person or digital sources (i.e. questionnaires, surveys).*

APPENDIX RESOURCES

Citizen Engagement Toolkit Glossary

Advisory Committee

A group of citizen volunteers selected by municipal decision-makers that meets regularly on a long-term basis to provide advice or support to municipal decision-makers.

Boards and Committees

A group of citizen volunteers selected by municipal decision-makers that meets regularly on a long-term basis. The degree of decision-making authority for municipal boards and committees will vary depending on the focus of the group and preference of municipal decision-makers.

Bow Tie Risk Assessment

A visual tool which effectively depicts risk providing an opportunity to identify and assess the key safety barriers either in place or lacking between a safe event and an unsafe outcome.

Application

Is a program or software. Mobile applications, or apps, are programs that can be downloaded from the Internet onto a device (i.e. a tablet; a smart phone).

Collaborate

The process of partnering with citizens in all aspects of a decision-making process including the development of alternatives and identification of a preferred solution.

Community

May include the "public" but often is composed of subsets of that group. Communities are based on geographic boundaries, interests, or beliefs. For example, the community could refer to homeowners, cyclists, parents of school aged children, or residents of a particular neighbourhood.

Community development

A process designed to create conditions of economic and social progress for the whole community.

Consensus conference

A dialogue between subject matter experts and citizens regarding an issue or decision that is open to the public and the media.

Consultation

The process of informing and obtaining feedback from citizens on analysis, alternatives and/or decisions.

Citizens

The most general and inclusive term for participants of engagement projects in the municipal context. This term includes individuals, not-for-profit groups and organizations, community groups and business organizations.

Citizen Engagement

A broad term that encompasses action by elected officials and government organizations to account for the knowledge, experiences, views and values of the public in their decisions.

Citizen Engagement Framework

Guidelines for implementing a more systematic approach to consulting and engaging citizens.

Citizen Panel

Randomly selected group of 10 or more citizens that meet over a set period of time (e.g. two to four weeks) to consider, discuss and deliberate issues and make decisions or recommendations.

Citizen Jury

A group of 12-20 randomly selected citizens representative of their community who meet over several days to deliberate on an issue.

Closed meeting or session

A meeting, usually of Council, that is closed to the public. Closed meetings or sessions are often referred to as "in-camera" meetings or sessions.

Decision

A formal conclusion or resolution reached after consideration.

Decision-maker

A person or organization that provides a formal conclusion to an issue after consideration.

Deliberation

Thoughtful discussion and consideration of an issue or decision from all sides.

Deliberative Polls

Built on the opinion poll concept with the addition of deliberation. The polls measure what citizen's think once they are informed and engage in-person around an issue or decision.

Discussion Forum

A web-based discussion board. Forums contain topic-based sub-forums. A conversation in a forum about a particular issue is a "thread."

Forums tend to have a hierarchical membership system, with administrators who manage the site, moderators who keep discussion according for forum terms of use, registered members, and visitors (who are not logged in). Each type of user has a different level of access to the site.

Discussion Guide

A workbook or booklet citizens use to discuss an issue and complete an in-depth questionnaire either online or on paper.

Digital Engagement

The use of web-based tools to gather citizen input on issues or decisions and identify solutions or recommendations.

Digital Media

Content, software and hardware. Text, graphics, audio, and video transmitted over the Internet are the content that drives digital engagement. In simple terms, software manages the content. Hardware includes computers, phones and accessories that feature the software.

Empowered Citizens

The process of placing decision-making or aspects of the decision-making process in the hands of citizens.

Engagement

Any process that engages citizens to provide input into municipal issues and decisions. It can involve them to clarify issues, identify solutions or alternatives, and partner in decision-making.

Geo-locate

The process of identifying the geographical location of a person or mobile device by means of digital information processed via the Internet.

Government

The establishment of policies and continuous monitoring of their proper implementation by members of a municipal council.

Governance

Management and coordination of municipal matters that calls upon all citizens to play a part in moving their community forward.

Hashtags or Tags

A word or phrase preceded by a hash or pound sign (#) and used to identify messages on a specific topic usually through social media platforms (i.e. Twitter; Facebook).

Inform

The process of providing balanced and unbiased information to citizens to assist them in understanding an issue or decision.

Instant or chat messaging

An electronic message sent in real time via the Internet and therefore immediately available for display on the recipient's screen.

Involve

The process of working directly with citizens through an engagement project to ensure citizen concerns, ideas and perspectives are understood and considered by the municipality.

Mobile

Refers to content that is communicated from mobile hardware, such as a smart phone (cell phone that accesses the Internet). Three important mobile technologies for citizen engagement are text messaging, mobile-friendly websites, and downloadable mobile applications that interact with a smart phone's GPS, camera, or text/multimedia messaging capabilities.

Notice

Means a legislated method of informing the public of either a subdivision or development decision; an upcoming public hearing; any proposed bylaw to adopt a statutory plan or land use bylaw; or amendments to any such documents. Notified landowners include those located within the site for which the application has been made (not including the applicant) and other landowners within a defined area.

Online Poll

A type of web-based survey where people complete a questionnaire. Online polls may be open to anyone or they may be restricted to a sample.

Open House

A method of consultation that involves an informal session with displays or other information available for participants to review. A feedback form or survey is used to record citizen comment, and a sign-in sheet for names and addresses of attendees is recommended.

APPENDIX RESOURCES

Outcome

A statement describing the desired future state that will arise as a result of engaging citizens.

Performance measurement

A measurement for a target group which allows you to evaluate how successful you were in engaging the group.

Public

Citizens and special interest groups who have an interest in, or are affected by, a municipality's outcome or decision.

Public Communication

A passive, one-way flow of information to citizens.

Public Consultation

A means to seek information and input from citizens on issues and decisions.

Public Deliberation

Is a combination of careful issue analysis and a process in which participants have equal and adequate opportunities to engage using dialogue that bridges different perspectives.

Public Hearing

The portion of a regular or special meeting of Council during which any person, group or representative affected by a proposed bylaw as per Section 692 of the *Municipal Government Act* shall be heard.

Public Meeting

A method of engaging citizens through consultation that involves a formal presentation by the organizer on the issues and options. Citizens are able to ask questions and provide input in a public forum, and a record of the proceedings is kept.

Record

A verbatim transcript of a meeting or event prepared by a professional Court Reporter or detailed minutes prepared by one of the municipality's Legislative Officers.

Representative Democracy

A system of government in which all eligible citizens vote to elect representatives to make decisions for them; representative democracy is in place in Canada.

Round-Table Meeting

A meeting of citizens where each is given equal opportunity to discuss and deliberate on specific issues or decisions. The table is round to avoid arguments of precedence.

RSS (Rich Site Summary)

A format for delivering regularly changing web content. It allows people to easily stay informed by sending alerts to those that sign-up for the service notifying them when content has been added or updated.

Special Interest Group

A person or group affected by or having an interest in an issue or decision of the municipality.

Spectrum of Engagement

A continuum of engagement approaches defined by the International Association of Public Participation. The continuum identifies five different degrees of citizen involvement – *Inform, Consult, Involve, Collaborate, and Empower*. The requirement to inform is important throughout the citizen engagement process.

Techniques

Different methods that can be used to engage citizens and gain participation. The effectiveness of each technique depends on a number of factors including the number of participants, level of engagement, cost, and time requirements.

Texting

An electronic message sent over a cellular phone network by typing words, often in shortened form.

Tools

Different instruments that can be used to engage citizens and gain public participation. The effectiveness of each tool depends on a number of factors including the target audience, the level of engagement being sought, cost, and time requirements.

Town Hall Meeting

An informal public meeting open to anyone in the municipality where participants present ideas, voice concerns and opinions and ask questions of municipal officials and/or subject matter experts.

For a glossary for digital engagement terms related to social media take a look at the AUMA and AAMDC Social Media Resource Guide.



COUNCIL SUBMISSION
NEW BUSINESS
September 11, 2023

DEVELOPMENT PERMIT APPLICATION 082-23

RECOMMENDATION:

That Council choose a refusal or approval option 1 or 2 as detailed in the package

DETAILS:

See attached package.

APPLICABLE LEGISLATION:

Land Use Bylaw 1882 and Bylaw 1965

ATTACHMENTS:

Complete package attached.

PREPARED BY: Keli Sandford, Planning and Development Officer

REVIEWED BY: Adrian Pedro, Director of Operations

APPROVED BY: Anthony Burdett, CAO

DEVELOPMENT APPLICATION NO. 082-23

Name of Applicant: GMS Mechanical & Equipment

Zoning District: Direct Control- DC

Location: Lot 12-15, Block 440, Plan 92B (336 25th Street)

Type of Development: Placement of an 8 ft. x 4 ft. portable sign

Background information

- Current use Development Permit no. 024-23 Storage for Machinery and equipment .
- Lots were Re-Zoned by Bylaw 1965 to Direct Control on February 13, 2023

Legislative Considerations

- Land Use Bylaw No. 1882.
- Schedule 2- Direct Control.
- Schedule 5 overlays (Downtown)
- Discretionary use: Sign (Approved as temporary coinciding with the Machinery and equipment sales and service permit 024-23 which expires April 10, 2025

Notices were circulated to:

- Adjacents
- Alberta Transportation(see attached)

Comments from the Development Officer/ Planner:

- Typically temporary/ portable type signage are approved for a period not to exceed 60 days with re-application after a 30 day rest period from expiry of the permit.(Section 7 of Schedule 6)
- TEMPORARY SIGN means any sign permitted, designed or intended to be displayed for a short period of time (not to exceed 60 days), including portable signs, balloon signs, developer marketing signs, land use classification signs, construction signs, political poster signs, window signs, banner signs, A-board signs, inflatable signs, special events signs, or any other sign that is not permanently attached to a building, structure or the ground.
- There is an existing freestanding sign on site that could be utilized for a more permanent signage type. (copy content etc. would need to be approved by Council)
- The look of the proposed sign is not attractive considering the area, and looks out of place, especially for an extended time of more than 60 days.

Recommendation(s):

REFUSAL with reasons:

1. THE PROPOSED SIGNAGE DOES NOT MEET THE REQUIREMENTS OF THE DOWNTOWN OVERLAY, SECTION 19 OF SCHEDULE 6;
 - a) 19.2 (5)NEW SIGNS SHOULD BE COMPATIBLE WITH THE HISTORIC CONTEXT AND CUSTOM OF THE RESPECTIVE BUILDING AND OF THE SERVICE, FUNCTION, PRODUCTS OR IDENTITY THAT THEY ADVERTISE;
 - b) 19.2(6) THE COLOUR, DESIGN, FORMAT, LETTERING STYLE AND SIZE OF SIGNS IN ANY DEVELOPMENT SHOULD BE COMPATIBLE WITH THE HISTORIC MATERIAL, PROPORTIONS, DETAILING AND CHARACTER OF THE RESPECTIVE BUILDING.
2. THE PROPOSED SIGNAGE DOES NOT MEET THE REQUIREMENTS OF SECTION 7, OF SCHEDULE 6(3)

APPROVAL OPTION 1 with conditions as follows:

1. DEVELOPMENT MUST CONFORM TO THE APPLICATION SUBMITTED TO THE TOWN OF FORT MACLEOD AND TO SCHEDULE 2, DIRECT CONTROL; SCHEDULE 3, STANDARDS OF DEVELOPMENT AND SCHEDULE 6- SIGNAGE OF LUB NO. 1882 ;
2. PLACEMENT OF THE SIGN SHALL BE NEAT AND ORDERLY AND SHALL NOT IMPEDE VISION OR VEHICLE LINES OF SIGHT FOR THE MOTORING PUBLIC AND OR BLOCK ANY ROAD/ TRAFFIC SIGNAGE;
3. THE SIGN SHALL BE PLACED FAR ENOUGH BACK FORM THE HIGHWAY THAT WINTER MAINTENANCE WILL NOT BE AFFECTED;
4. THE SIGN SHALL BE PLACED ENTIRELY WITHIN THE PROPERTY BOUNDARY AND NOT ON/IN THE MUNICIPAL UTILITY RIGHT OF WAY/ ROADWAY.
5. SIGN SHALL NOT OBSTRUCT OTHER ON STREET PARKING, PEDESTRIANS OR VEHICLE LINES OF SIGHT;
6. THE SIGN SHALL BE WEIGHTED, BLOCKED OR TETHERED AND/ OR SECURED IN SUCH A WAY THAT IS DOES NOT BECOME A NUISANCE IN THE EVENT OF HIGH WINDS; SIGN SHALL BE PERMANENTLY REMOVED FROM THE SITE IF WIND AND SAFETY BECOMES AN ISSUE;
7. IF ADDITIONAL SIGNAGE IS REQUIRED, A SEPARATE APPLICATION SHALL BE SUBMITTED TO BE REVIEWED BY COUNCIL.
8. **THE SIGN IS APPROVED IN CONJUNCTION WITH DEVELOPMENT PERMIT 024-23 AND SHALL EXPIRE APRIL 10, 2025 UNLESS AN EXTENSION IS APPROVED. ******* OR ANY OTHER TIME LIMIT THAT THE COUNCIL SEES FIT ie: 90 DAYS, 1 YEAR??
9. DEVELOPMENT MUST COMPLY WITH ANY AND ALL FEDERAL AND PROVINCIAL STATUTES AND REGULATIONS, AND ANY AND ALL TOWN OF FORT MACLEOD MUNICIPAL BYLAWS AND POLICIES.

APPROVAL OPTION 2 with conditions as follows:

1. DEVELOPMENT MUST CONFORM TO THE APPLICATION SUBMITTED TO THE TOWN OF FORT MACLEOD AND TO SCHEDULE 2, DIRECT CONTROL; SCHEDULE 3, STANDARDS OF DEVELOPMENT AND SCHEDULE 6- SIGNAGE OF LUB NO. 1882 ;
2. PLACEMENT OF THE SIGN SHALL BE NEAT AND ORDERLY AND SHALL NOT IMPEDE VISION OR VEHICLE LINES OF SIGHT FOR THE MOTORING PUBLIC AND OR BLOCK ANY ROAD/ TRAFFIC SIGNAGE;
3. THE SIGN SHALL BE PLACED FAR ENOUGH BACK FORM THE HIGHWAY THAT WINTER MAINTENANCE WILL NOT BE AFFECTED;
4. THE SIGN SHALL BE PLACED ENTIRELY WITHIN THE PROPERTY BOUNDARY AND NOT ON/IN THE MUNICIPAL UTILITY RIGHT OF WAY/ ROADWAY.
5. SIGN SHALL NOT OBSTRUCT OTHER ON STREET PARKING, PEDESTRIANS OR VEHICLE LINES OF SIGHT;
6. THE SIGN SHALL BE WEIGHTED, BLOCKED OR TETHERED AND/ OR SECURED IN SUCH A WAY THAT IS DOES NOT BECOME A NUISANCE IN THE EVENT OF HIGH WINDS; SIGN SHALL BE PERMANENTLY REMOVED FROM THE SITE IF WIND AND SAFETY BECOMES AN ISSUE;
7. IF ADDITIONAL SIGNAGE IS REQUIRED, A SEPARATE APPLICATION SHALL BE SUBMITTED TO BE REVIEWED BY COUNCIL.
8. **THE SIGN IS APPROVED ONLY AS A TEMPORARY PORTABLE SIGN AND IS NOT TO EXCEED A PERIOD OF 60 DAYS (WITH RE-APPLICATION AFTER 30 DAYS REST PERIOD) AS PER SCHEDULE 6 SIGNAGE, SECTION 7- TEMPORARY SIGNS OF THE LAND USE BYLAW 1882.**
9. DEVELOPMENT MUST COMPLY WITH ANY AND ALL FEDERAL AND PROVINCIAL STATUTES AND REGULATIONS, AND ANY AND ALL TOWN OF FORT MACLEOD MUNICIPAL BYLAWS AND POLICIES.

TOWN OF FORT MACLEOD

BOX 1420, FORT MACLEOD, AB T0L 0Z0 PH: (403) 553-4425 FAX: (403) 553-2426

PUBLIC NOTICE OF COUNCIL MEETING

Dear Adjacent Landowners and Agencies:

Notice is hereby given that a Discretionary- Direct Control application will be considered by the Fort Macleod Municipal Council for a Development Permit with regard to the following:

Application No. 082-23

Name of Applicant: GMS Mechanical & Equipment

Zoning District: Direct Control- DC

Location: Lot 12-15, Block 440, Plan 92B (336 25th Street)

Type of Development: Placement of an 8 ft. x 4 ft. portable sign

Pursuant to Land Use Bylaw No. 1882 of the Town of Fort Macleod, notice is hereby given that the Town Council will consider this development application on:

Date: Monday September 11, 2023 at 7:00 p.m.

Place: G. R. Davis Administration Building, Chambers, located at 410 20th Street, Fort Macleod

This Development is considered a Discretionary use within the Land Use Bylaw's Direct Control District and must be heard by the Town's Municipal Council.

As per Land Use Bylaw 1882, Discretionary applications must be circulated to adjacent landowners and the appropriate government agencies for comments and/or concerns.

Any person who feels affected by this proposal has the right to submit concerns or be heard at the meeting. Comments and /or a letter requesting to be heard must be dropped off, mailed, or emailed to development@fortmacleod.com no later than noon on: September 1, 2023.

Any information submitted will become available to the public and may also be shared with the applicant and appropriate government agencies and is subject to the *Freedom of Information and Protection of Privacy Act* (FOIP).

This Application and all associated information may be viewed in full at the Town Administration Building, Monday to Friday between the hours of 8:30 a.m. and 4:30 p.m.

Date: August 23, 2023 Signed: 

Keli Sandford
Planning and Development Officer



TOWN OF FORT MACLEOD
SIGN APPLICATION
DEVELOPMENT PERMIT

FOR OFFICE USE ONLY	
Date Received:	Aug. 23
Accepted By:	Kole
Date Deemed Complete:	Aug. 23
Application No. (if applicable):	082-23

Date of Application: JUL 18 2023



IMPORTANT NOTICE: This application does not permit you to install the sign until such time as a notice of decision has been issued by the Development Authority. If a decision has not been received within 40 days of the date of application and no extension agreement has been entered into, you have the right to deem the application refused and file an appeal to the Subdivision and Development Appeal Board.

Discus. D.C. Council Aug 28

APPLICANT INFORMATION

Name of Applicant: GMS Mechanical & Equipment

Mailing Address: PO Box 1086 Phone: _____

City: Fort Macleod Phone (alternate): _____

Postal Code: TOL 0Z0 Fax: _____

Email: _____

Is the applicant the owner of the property? Yes No

IF "NO" please complete box below

Name of Owner: J & C Burrows Phone: _____

Mailing Address: _____

City: _____

Postal Code: TOL 0Z0

Applicant's interest in the property:

- Agent
- Contractor
- Tenant
- Other _____

SIGN INFORMATION

TYPE OF WORK: New Permanent Sign Changes to Existing Sign Temporary Sign

Sign Location (Civic Address): 336 25th St.

Are there any other signs at this location? Yes No

If yes, please state how many: 1

336 25th St.

<p>SIGN TYPE*:</p> <p><input type="checkbox"/> Temporary</p> <p><input type="checkbox"/> Canopy</p> <p><input type="checkbox"/> Window</p> <p><input checked="" type="checkbox"/> Freestanding</p> <p><input type="checkbox"/> Fascia</p> <p><input type="checkbox"/> Mural</p> <p><input type="checkbox"/> Projecting</p> <p><input checked="" type="checkbox"/> Other</p> <p><small>**Billboard signs and roof signs are not permitted in the Town</small></p>	<p>PROJECTION STYLE: <i>Mark any or all that apply</i></p> <p><input checked="" type="checkbox"/> Lettering / logo</p> <p><input type="checkbox"/> Manual changeable lettering content</p> <p><input type="checkbox"/> Electronic changeable lettering content</p> <p><input type="checkbox"/> Animation</p> <p><input type="checkbox"/> Movement / rotation</p>	<p>ILLUMINATION: <i>Mark any or all that apply</i></p> <p><input checked="" type="checkbox"/> No illumination</p> <p><input type="checkbox"/> Direct illumination</p> <p><input type="checkbox"/> Internal illumination</p> <p><input type="checkbox"/> Flashing</p>
---	---	---

portable

				Office Use
Length of Sign:	8	<input type="checkbox"/> m ²	<input checked="" type="checkbox"/> ft ²	
Height of Sign:	4	<input type="checkbox"/> m ²	<input checked="" type="checkbox"/> ft ²	
Sign Face Area (length x height):	32	<input type="checkbox"/> m	<input checked="" type="checkbox"/> ft ²	
Top of Sign Height:	6			
from Grade:	6	<input type="checkbox"/> m	<input checked="" type="checkbox"/> ft	
from Roof:	—	<input type="checkbox"/> m	<input type="checkbox"/> ft	

If the sign is only for temporary use: ~~No~~ *Yes* *As per Bylaw 1965 (7.)*

For how many days is the sign proposed to be displayed? _____ days *S.4*

S. DP 024-23 (April 10 2025.)
see permit

SITE PLAN

- **Please attach a plan drawn to a suitable scale and photographs, if available, illustrating:**
- Location of all existing and proposed sign(s) on the property
 - Size, height, and other dimensions of the proposed sign(s), including any supporting structures
 - Details of sign content (wording, lettering, graphics, colour and design scheme, materials, etc.)
 - Location of the property boundaries of the parcel upon which the proposed sign(s) are to be located
 - Setbacks from property lines of proposed sign(s) and existing building(s)

DECLARATION OF APPLICANT/AGENT

The information given on this form is full and complete and is, to the best of my knowledge, a true statement of the facts in relation to the application for a Sign.

IMPORTANT: This personal information is being collected under the authority of the Town of Fort Macleod for development. It is protected by the privacy provisions of the Freedom of Information and Protection of Privacy Act. For more information contact the Town of Fort Macleod FOIP Coordinator at 403-553-4425.

 APPLICANT Registered Owner (if not the same as applicant)



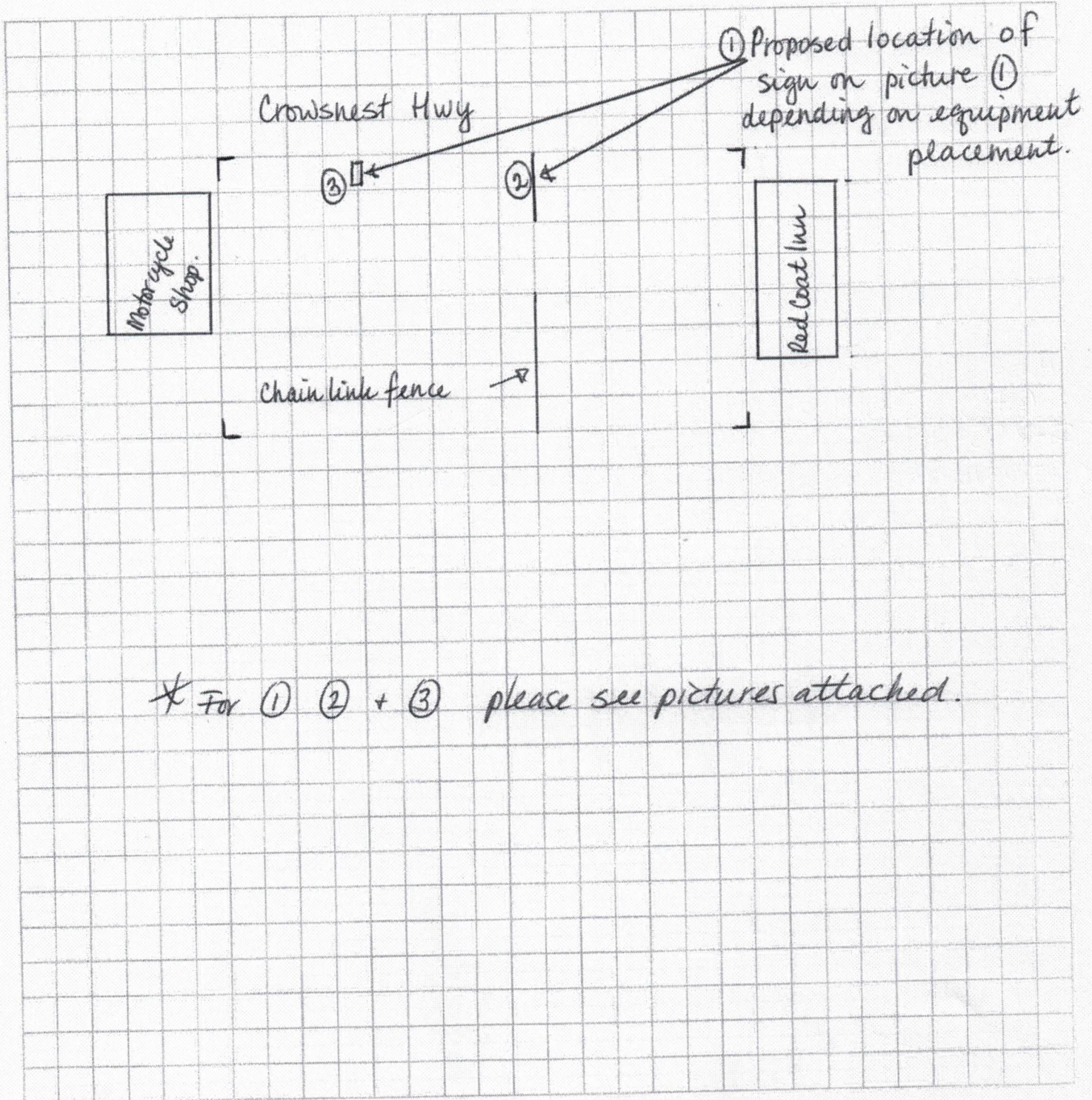
Development Application No. _____

Applicant: GMS Mechanical Date: AUG 22 2023

Roll No. 2241500/600/700/800 Zoning: Direct Control



SITE PLAN GRID





①



GMS
MECHANICAL

EQUIPMENT
553 0000
23 RD ST

②



③





TOWN OF FORT MACLEOD TEMPORARY DEVELOPMENT PERMIT No. 024-23

Name of Applicant (Landowner): GMS Mechanical & Equipment

Zoning District: Direct Control- DC Roll No. 2241500/2241600/2241700/2241800

In the matter of development on a property located at: 336 25th Street

Legal Land Description: Lots 12-15, Block 440, Plan 92B

The development as specified in Application No: 024-23 for the following use: Storage of farm machinery and equipment for sales and service.

has been **APPROVED AS TEMPORARY** subject to the following conditions:

1. DEVELOPMENT MUST CONFORM TO THE APPLICATION SUBMITTED TO THE TOWN OF FORT MACLEOD AND TO SCHEDULE 2, DIRECT CONTROL; SCHEDULE 3, STANDARDS OF DEVELOPMENT OF LUB NO. 1882;
2. ALL REFUSE AND GARBAGE STORAGE AREAS SHALL BE EFFECTIVELY SCREENED UNTIL SUCH TIME AS COLLECTION AND DISPOSAL ARE POSSIBLE;
3. APPLICANT SHALL ENSURE THAT ALL MATERIALS/EQUIPMENT IS CONTAINED ON THE SITE AND DOES NOT CREATE A NUISANCE TO ADJACENT PROPERTIES;
4. HEAVILY SOILED EQUIPMENT SHALL BE CLEANED BEFORE PLACEMENT ON THE LOT;
5. PLACEMENT OF EQUIPMENT SHALL BE NEAT AND ORDERLY AND SHALL NOT IMPEDE VISION OR VEHICLE LINES OF SIGHT FOR THE MOTORING PUBLIC AND OR BLOCK ANY ROAD/ TRAFFIC SIGNAGE;
6. EQUIPMENT SHALL BE PLACED FAR ENOUGH BACK FORM THE HIGHWAY THAT WINTER MAINTENANCE WILL NOT BE AFFECTED;
7. EQUIPMENT SHALL NOT OBSTRUCT OTHER ON STREET PARKING OR PEDESTRIANS;
8. EQUIPMENT SHALL BE WEIGHTED, BLOCKED, TETHERED AND /OR SECURED IN SUCH A WAY THAT THEY DO NOT BECOME A NUISANCE IN THE EVENT OF HIGH WINDS.
9. IF SIGNAGE IS REQUIRED, A SEPARATE APPLICATION SHALL BE SUBMITTED TO BE REVIEWED BY COUNCIL.
10. THE STOP ORDER ISSUED ON NOVEMBER 21, 2022 HAS BEEN COMPLIED WITH AND IS NOW NULL AND VOID.

DATE OF DECISION: April 10, 2023

Signed: _____

Keli Sandford

Planning and Development Officer

EXPIRES: April 10, 2025 (as per Bylaw 1965)

DEVELOPMENT SHALL NOT COMMENCE UNTIL 21 DAYS FROM THE DATE OF THE WRITTEN NOTICE OF DECISION IS GIVEN AS PER SECTION 686(1) OF THE MUNICIPAL GOVERNMENT ACT UNLESS A VOLUNTARY WAIVER OF CLAIMS FORM IS SUBMITTED BY THE APPLICANT.

INFORMATIVE:

1. UTILITY SAFETY PARTNERS MUST BE CONTACTED AT 1-800-242-3447 TO LOCATE UNDERGROUND UTILITIES PRIOR TO COMMENCEMENT OF DEVELOPMENT.
2. A WATER METER MUST BE ACQUIRED FROM THE TOWN OFFICE WITH A \$500 REFUNDABLE DEPOSIT AND INSTALLED BY A LICENSED PLUMBER PRIOR TO TOWN'S PUBLIC WORKS DEPARTMENT TURNING ON WATER. THE WATER CURB STOP MUST NOT BE TURNED ON BY THE PLUMBER.
3. ATCO GAS PROVIDER TO BE CONTACTED AT 403-310-5678 TO ESTABLISH GAS SERVICES.(If required)
4. FORTIS ELECTRICITY SERVICE PROVIDER TO BE CONTACTED AT 310-WIRE TO ESTABLISH ELECTRICAL SITE ID AND SERVICE.(If required)
5. IF AN APPEAL IS LODGED PURSUANT TO SECTION 686 OF THE MUNICIPAL GOVERNMENT ACT, AS AMENDED, THEN A PERMIT WILL NOT BECOME EFFECTIVE UNTIL THE SUBDIVISION AND DEVELOPMENT APPEAL BOARD HAS DETERMINED THE APPEAL.
6. NOTICE OF APPROVAL IN NO WAY REMOVES THE NEED TO OBTAIN ANY PERMIT OR APPROVAL REQUIRED BY ANY FEDERAL, PROVINCIAL OR MUNICIPAL LEGISLATION, ORDER AND/OR REGULATIONS PERTAINING TO THE DEVELOPMENT APPROVED.
7. THE PERMIT INDICATES ONLY THE DEVELOPMENT TO WHICH IT RELATES IS AUTHORIZED IN ACCORDANCE WITH THE PROVISIONS OF THE LAND USE BYLAW, AND IN NO WAY RELIEVES OR EXCUSES THE APPLICANT FROM COMPLYING WITH THE LAND USE BYLAW OR ANY OTHER BYLAW, LAWS, AND/OR REGULATIONS AFFECTING SUCH DEVELOPMENT.
8. THE PERMIT IS VALID FOR A PERIOD OF 12 MONTHS FROM DATE OF ISSUE. IF, AT THE EXPIRY OF THIS PERIOD, DEVELOPMENT HAS NOT COMMENCED THE PERMIT SHALL BE NULL AND VOID.
9. DEVELOPMENT OFFICER MAY REQUIRE CESSATION OF WORK WHERE THE DEVELOPMENT FOR WHICH THE PERMIT HAS BEEN ISSUED IS NOT BEING CARRIED OUT OR COMPLETED TO THE EXTENT OR IN THE MANNER ORIGINALLY APPROVED.
10. THE PERMIT RUNS WITH THE LAND AND IS TRANSFERABLE BETWEEN OWNERS OF SAID LAND.
11. **ALL CONTRACTORS ARE REQUIRED TO OBTAIN A BUSINESS LICENSE FROM THE TOWN OF FORT MACLEOD, OR ALTERNATELY PROOF OF A REGIONAL LICENSE MAY BE SUBMITTED.**

A **Development Permit IS NOT** a building permit, plumbing permit, electrical permit, a permit to install underground or above-ground fuel tanks, a permit issued by a Public Health Inspector, or a business license. These and other separate permits or licenses may be required by municipal, provincial or federal authorities.

**TOWN OF FORT MACLEOD
in the Province of Alberta
BYLAW NO. 1965**

BEING a bylaw of the Town of Fort Macleod in the Province of Alberta, to amend Bylaw No. 1882, being the municipal Land Use Bylaw.

WHEREAS the Town of Fort Macleod Council is in receipt of a request to redesignate certain lands within the municipality;

WHEREAS the intent of proposed Bylaw No. 1965 is to redesignate lands legally described as:

LOT 13-15 AND WEST 1/2 OF LOT 12, BLOCK 440, PLAN 92B
WITHIN NW 1/4 SEC 12, TWP 9, RGE 26, W 4 M

from "Commercial General: CG" to "Direct Control: DC"; and

WHEREAS the lands that are the subject of this proposed redesignation are shown on the map in Schedule 'A' attached hereto;

AND WHEREAS the purpose of the bylaw is the lands for Machinery and equipment sales and service development under a direct control district in the downtown and provide for its consideration at a public hearing.

NOW THEREFORE, under the authority and subject to the provisions of the *Municipal Government Act, Revised Statutes of Alberta 2000*, Chapter M-26, as amended, the Council of the Town of Fort Macleod in the Province of Alberta duly assembled does hereby enact the following:

1. Lands legally described Lots 13-15 and West ½ of Lot 12, Block 440, Plan 92B be redesignated such that lands designated as "Commercial General: CG" be designated "Direct Control: DC".
2. The Land Use Districts Map shall be amended to reflect this change.
3. That the following be added to Land Use Bylaw Schedule 2 Direct Control: DC Section 8:

8.4 LOTS 13-15 and West ½ Lot 12, BLOCK 440, PLAN 92B

- (1) Permitted or Discretionary Uses applicable to this lot:

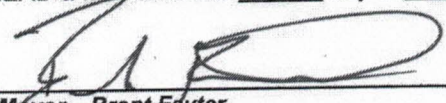
Permitted Uses	Discretionary Uses
Machinery and equipment sales and service	Accessory structure
	Accessory use
	Sign

- (2) This lot is subject to the minimum requirements, application procedures, additional requirements, and applicable schedules per Sections 3 to 7 of this land use district.
- (3) This lot is subject to all sections of **Schedule 5: Overlays**.
- (4) The decision making authority for the listed uses is **Council**.

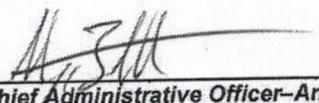
- (5) A development permit is required for the Machinery and equipment sales and service use. The permit will be limited as temporary permit for two (2) years. Council may include any condition deemed necessary when considering the development.
- (6) The Machinery and equipment sales and service use may also, prior to the expiration of the permit, be considered by Council for extension no longer than two (2) years in duration.
- (7) A development permit is required for listed discretionary uses under section 8.4(1). These uses will be approved as temporary coinciding with the Machinery and equipment sales and service permit and will expire with the expiration of that use.

- 4. Bylaw No. 1882 is hereby amended and consolidated.
- 5. This bylaw shall come into effect upon third and final reading hereof.

READ a **first** time this 28th day of November, 2022.

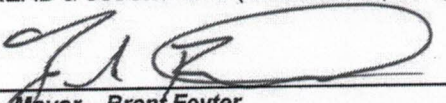


 Mayor - Brent Feyter

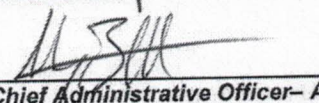


 Chief Administrative Officer- Anthony Burdett

READ a **second** time (as amended) this 13th day of February, 2023.

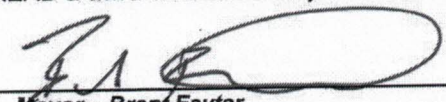


 Mayor - Brent Feyter



 Chief Administrative Officer- Anthony Burdett

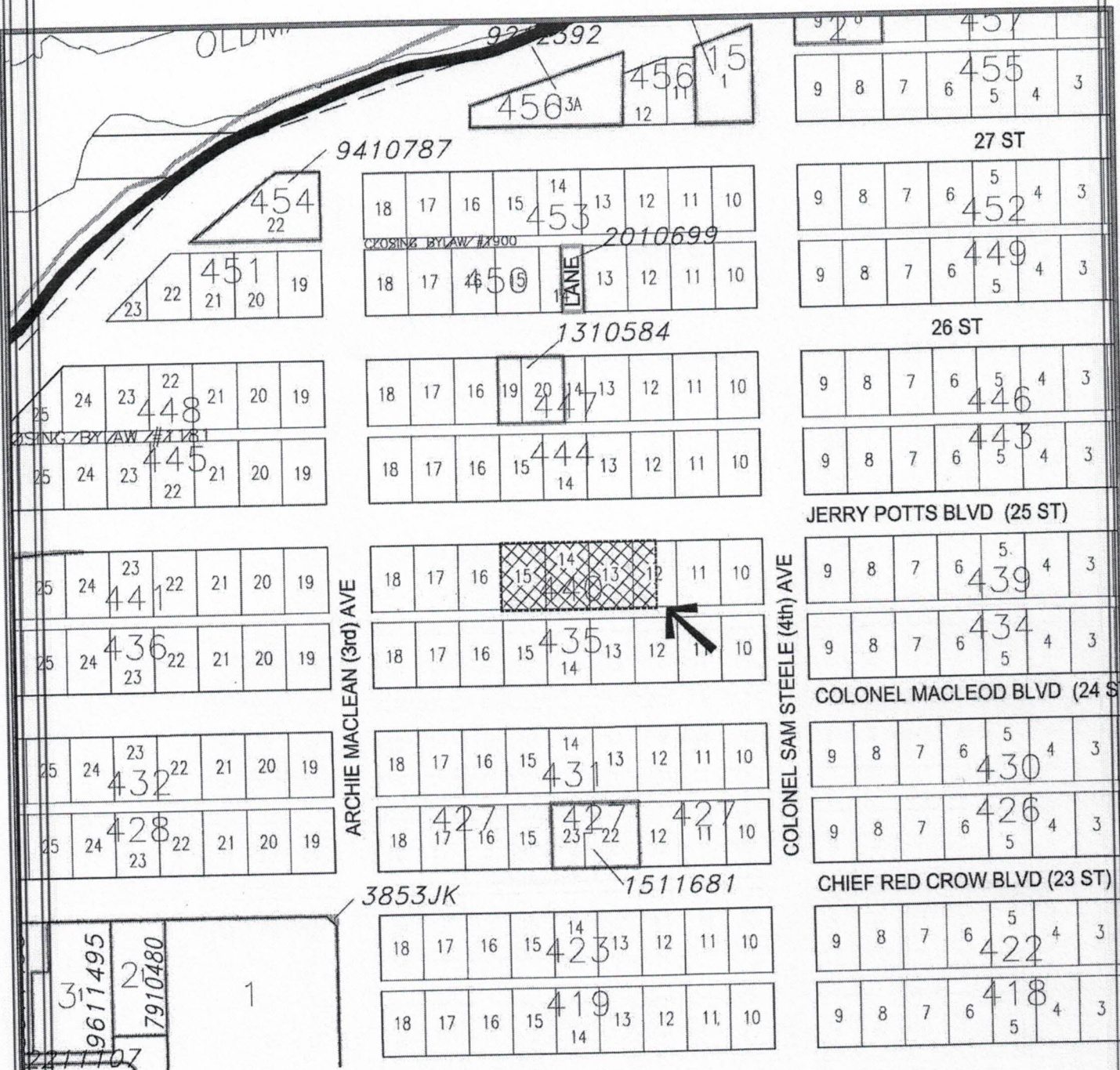
READ a **third** time and finally PASSED this 13th day of February, 2023.



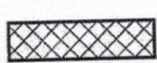
 Mayor - Brent Feyter



 Chief Administrative Officer- Anthony Burdett



LAND USE DISTRICT REDESIGNATION SCHEDULE 'A'



FROM: COMMERCIAL GENERAL: CG
TO: DIRECT CONTROL: DC

LOT 13-15 AND W. 1/2 OF LOT 12, BLOCK 440, PLAN 92B
WITHIN NW 1/4 SEC 12, TWP 9, RGE 26, W 4 M

MUNICIPALITY: TOWN OF FORT MACLEOD
DATE: NOVEMBER 22, 2022

Bylaw #: 1965
Date: February 13th, 2023



0 Metres 50 100 150 200
November 22, 2022 N:\Willow-Creek-MD\Fort-MacLeod\Fort MacLeod LUD & Land Use Redesignations\LUD Redesignations\Ft MacLeod - Bylaw 1965 - Lot 12-15, Blk 440, Plan 92B.dwg



MAP PREPARED BY:
OLDMAN RIVER REGIONAL SERVICES COMMISSION
3105 16th AVENUE NORTH, LETHBRIDGE, ALBERTA T1H 5E8
TEL. 403-329-1344
"NOT RESPONSIBLE FOR ERRORS OR OMISSIONS"

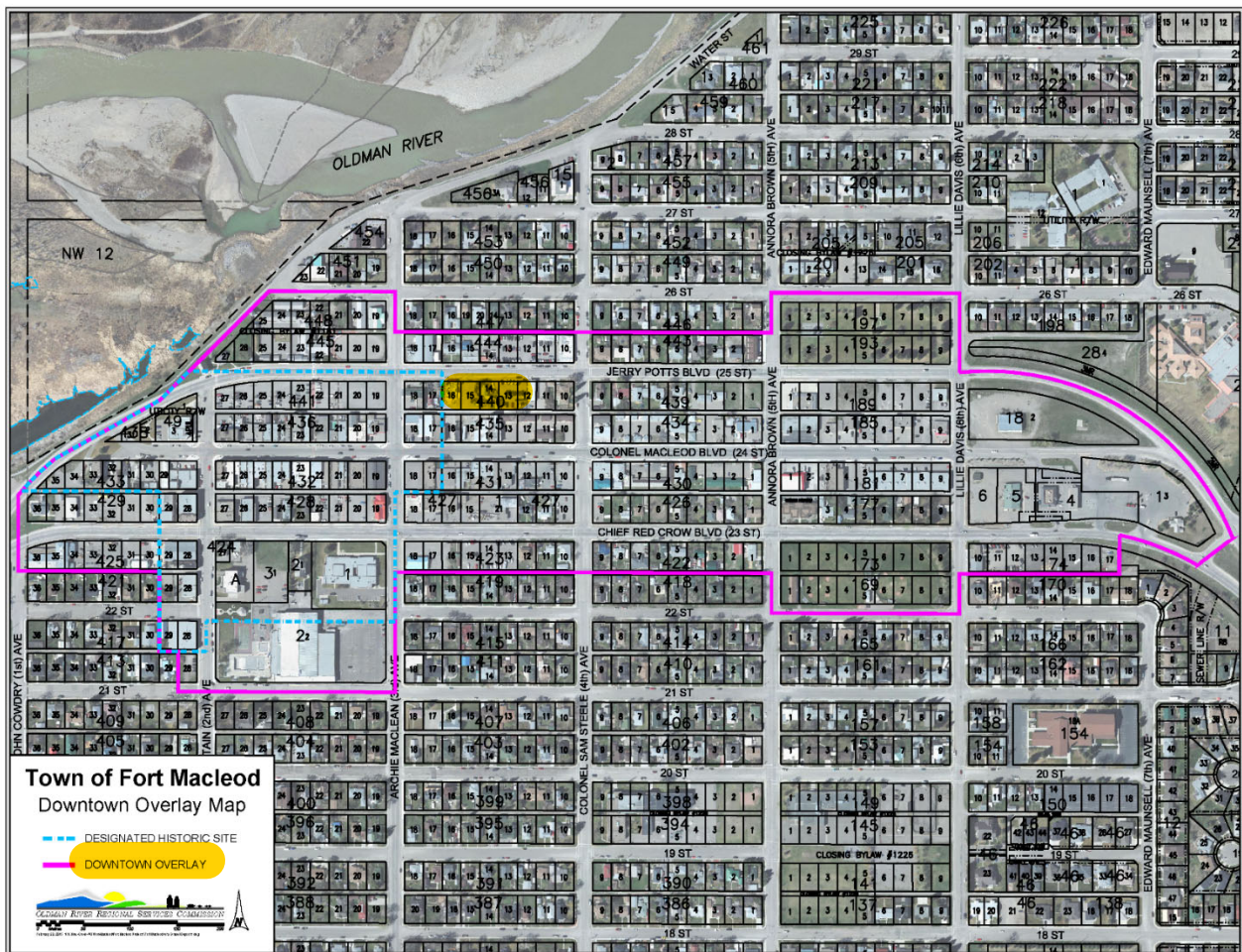
SCHEDULE 5: OVERLAYS

SECTION 1 DOWNTOWN OVERLAY

2.1 APPLICABILITY

The intent of the Downtown Overlay is to maintain and enhance the historic development patterns of the mixture of uses that exist and that may be developed in the downtown area of Fort Macleod, as identified by the Downtown overlay map in 2.2 of this section. The requirements of this section are above and beyond the requirements contained in each of the land uses that may be affected by this overlay, and if there is a conflict between the requirements of a land use district and this section, this section shall take precedence.

2.2 DOWNTOWN OVERLAY AREA



- (1) All accessory buildings and structures shall take access from the lane;
- (2) there shall not be front driveways or parking areas approved that access from either 23 Street or 25 Street.

2.4 BUILDING ALTERATIONS, MAINTENANCE, REPAIRS, REHABILITATION AND ADDITIONS

Where a development involves the alteration, repair or rehabilitation of or an addition to an existing building, the development should be designed:

- (1) to complement the character of the area and development on adjacent lots and the overall existing or desired character of the street and area, based on approved statutory or non-statutory plans and/or to the discretion of the Development Authority, through investigation of existing;
 - (a) building heights, scale, massing, form, orientation, and roof slopes;
 - (b) architectural features, exterior finishes and colour schemes;
 - (c) entrances, walkways and linkages;
 - (d) parking and vehicular access layout;
 - (e) landscaping and outdoor amenity spaces; and
 - (f) any other matters deemed appropriate by the Development Authority;
- (2) where a development involves the alteration of or an addition to an existing building, the development should be designed to ensure that architectural details having historic character are maintained.

2.5 NEW CONSTRUCTION

Where a development involves new construction, the development should be designed:

- (1) to complement the character of the area and development on adjacent lots and the overall existing or desired character of the street and area, based on approved statutory or non-statutory plans and/or to the discretion of the Development Authority, through investigation of existing;
 - (a) building heights, scale, massing, form, orientation, and roof slopes;
 - (b) architectural features, exterior finishes and colour schemes;
 - (c) entrances, walkways and linkages;
 - (d) parking and vehicular access layout;
 - (e) landscaping and outdoor amenity spaces; and
 - (f) any other matters deemed appropriate by the Development Authority;
- (2) where a development involves the alteration of or an addition to an existing building, the development should be designed to ensure that architectural details having historic character are maintained.

2.5 SIGNAGE

- (1) All signage within the Downtown Overlay Area shall meet the requirements of Section 19 of Schedule 6 (Signage).

- (a) 1600 - 6 Avenue, legally described as Block OT, Plan 92B and Lots 1 to 9, Blocks 109, 113 and 117, Plan 92B F. P. Walshe School, Livingstone Range School Division.

SECTION 7 **TEMPORARY SIGNS**

- (1) All temporary signs require a development permit except those signs exempted in Section 3 of this Schedule.
- (2) A development permit for a temporary sign shall be valid for the period specified in the development permit approval, to the discretion of the Development Authority, **but for a period of no longer than 60 days.**
- (3) Once the permit has expired for a temporary sign at a location address, re-application for another temporary sign on the same site shall not occur until 30 days has elapsed from the expiration of the previously approved permit or 30 days from the date at which the temporary sign is removed, whichever is the later of the two dates.
- (4) No temporary signs shall be suspended on or between support columns of any permanent sign such as a freestanding sign or billboard sign, notwithstanding any other sign that may be considered as permanent by the Development Authority.
- (5) No posters or signs shall be placed on any public utility such as a power pole.
- (6) No posters or signs shall be placed on municipal, provincial or federal signage.
- (7) Temporary signs shall not be projected using animation, digital or electronic changeable copy.
- (8) The Development Authority must only approve the location of the temporary sign on the premises after having given due consideration for the location of power supply, sight lines visibility, parking pattern on the site and/or any other site specific development constraints that the Development Authority considers relevant.
- (9) All temporary signs shall be located within the property lines of the location address shown on the development permit application.
- (10) At the discretion of the Municipal Subdivision and Development Authority temporary signs **may contain off-premises sign content** as defined in Section 1 of this Schedule.
- (11) The Development Authority may require the posting of a security with the Town to ensure compliance with any and all conditions of approval and the removal of the sign on or before the date of expiry of the permit.
- (12) Temporary signs shall not be allowed in any residential land use district unless placed on Town boulevards and permission has been obtained from the Development Authority.
- (13) No temporary sign (including electrical cords) shall be placed on or extend over or project into any municipal property or beyond the boundaries of the private lot or premises upon which it is sited without the written authorization of the Development Authority.
- (14) The copy area of a temporary sign shall not exceed 3.7 m² (40 ft²).

SECTION 16 PORTABLE SIGNS

- (1) Portable signs shall be considered temporary signs.
- (2) The sign area of a portable sign shall not exceed 3.7 m² (40 ft²).
- (3) No more than one portable sign per frontage or where there are two or more frontages, a total of two portable signs may be located on a single lot or parcel, except in a designated tourism signage area where more than two portable signs may be located at the discretion of the Development Officer or Municipal Planning Commission.
- (4) No portable sign shall extend or project into any public place or beyond the boundaries of the lot or premises upon which it is sited without the approval of the Development Officer or Municipal Planning Commission.
- (5) Each development permit application for a portable sign shall state the length of time that a portable sign may remain on the premises.

SECTION 17 TOURISM SIGNAGE AREAS

- (1) Council may designate by resolution specific tourism signage areas along routes likely to be traveled by tourists within and approaching the Town of Fort Macleod.
- (2) The following signage may be located in a designated tourism signage area:
 - (a) specific attraction signage and theme signage provided the theme, design, colour and type is consistent with signage advertising the same or specific attraction and meets the other requirements of this section;
 - (b) directional and information signage as required by Alberta Transportation or the Town of Fort Macleod;
 - (c) special events signage provided it meets the approval of the Development Officer or the Municipal Planning Commission and remains on the site for a period of no longer than a total accumulation of 30 days per calendar year; or

SECTION 18 THEME SIGNAGE

- (1) Town Council may approve distinctive designs or logos for utilization as theme signage. These designs and logos may be further used in connection with informational signage or specific attraction signage if such signage is erected by the Town of Fort Macleod or some other government agency.
- (2) Any additional use of council approved designs or logos for commercial or other purposes, requires prior approval of council.
- (3) All theme signage shall be 0.4 m² (4 ft²) or less in area when attached to any light standards, traffic control sign, signal light other device.

SECTION 19 OVERLAY AREAS SIGNAGE

19.1 APPLICABILITY

For the purposes of this section, parcels or lots located within the Downtown overlay and Provincial Historic Area overlay are subject to following requirements when erecting signage within the designated areas.

19.2 GENERAL REQUIREMENTS

- (1) No new signage shall be erected on parcels or lots located within the Downtown overlay and Provincial Historic Area overlay unless in the opinion of the Development Officer or the Municipal Planning Commission, such signage is compatible with the historic nature of the area.
- (2) All development permit applications for signage within the Provincial Historic Area shall be referred to the Fort Macleod Provincial Historic Area Design Review Committee and Alberta Culture for comments before the application is dealt with. The Committee shall respond within 28 days.
- (3) The sign area of a fascia sign or a wall sign shall not exceed the lesser of 4.6 m² (50 ft²) or 15 percent of the exterior wall area upon which such signage is attached or located.
- (4) The sign area of a freestanding sign shall not exceed 4.6 m² (50 ft²).
- (5) New signs should be compatible with the historic context and custom of the respective building and of the service, function, products or identity that they advertise.
- (6) The colour, design, format, lettering style and size of signs in any development should be compatible with the historic material, proportions, detailing and character of the respective building.
- (7) Signs must not be mechanically mobile and lighting must be continuous.
- (8) A sign attached to a building located within the Downtown overlay and Provincial Historic Area overlay shall not be higher than:
 - (a) in the case of a one storey building within a continuous horizontal parapet about the roof, the top of the parapet; or
 - (b) in any other case, whichever of the following is the lowest:
 - (i) 8.0 m (26 ft) above grade;
 - (ii) the bottom of the sills of the first level of windows above the first storey; or
 - (iii) the lowest point of the roofline.
- (9) A sign, if attached as to project outwards from the face of a building, located within the Downtown Overlay and Provincial Historic Area Overlay must:
 - (a) have no more than two faces;
 - (b) project no more than 1.4 m (4.6 ft) from the building;
 - (c) not extend higher than whichever of the following is the lowest:
 - (i) 8.0 m (26 ft) above grade;
 - (ii) the bottom of the sills of the first level of windows above the first storey; or
 - (iii) the lowest point of the roofline.
 - (d) not have exposed guy wires or turnbuckles; and
 - (e) not exceed 1.5 m² (16 ft²) in area.

- (10) There shall not be more than one sign attached so as to project outwards from the face of a business establishment for each entrance door to it.
- (11) The sign shall not be attached to a roof, chimney, smokestack, elevator tower or penthouse.
- (12) A support for the sign shall not extend above the cornice of the building to which the sign is attached.
- (13) The location, theme, construction materials, size and installation technique for all signs and murals shall minimize the impact to the buildings and shall not cause harm to the structural integrity of the building or its exterior.

SECTION 20 SIGNAGE CLUTTER AREAS

- (1) Council may designate certain areas of the town as signage clutter areas when, in the opinion of council, there exists an excess of signage.
- (2) No new signage shall be erected in a signage clutter area unless and until the amount of existing signage has been reduced to the satisfaction of the Municipal Planning Commission.

SECTION 21 ENFORCEMENT

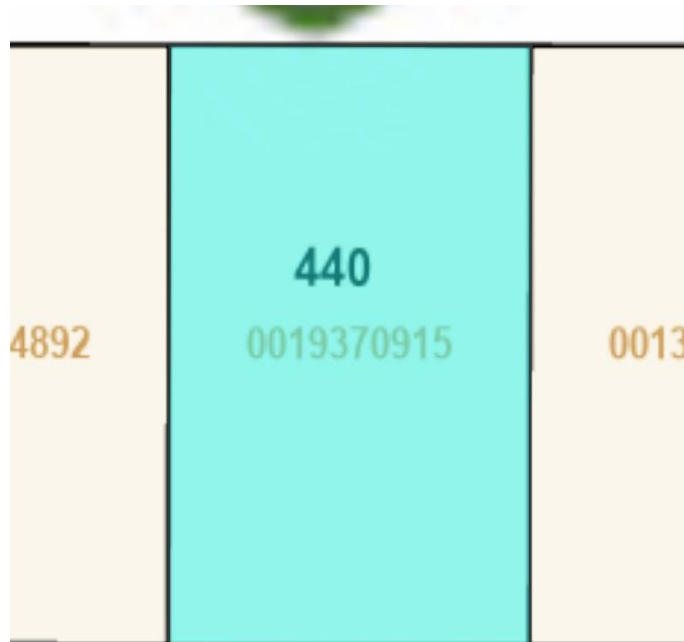
If a sign is erected without a permit, has fallen into a state of disrepair beyond what is deemed acceptable by the Development Authority, or is in violation of any requirement of this bylaw or any other applicable regulation, the owner of the sign shall:

- (1) be notified of the violation and any corrective measures required, as per Section 5.2 of the Administrative Schedule of this bylaw;
- (2) be subject to all other actions the Development Authority is permitted to undertake as per the *MGA*, as outlined in Section 5 of the Administrative Schedule of this bylaw, including but not limited to:
 - (a) subject to obtaining consent from the owner or occupier of the lands, entering onto the lands on which the signage is located to undertake works required to correct the violation, and the recovery of any costs associated with the same;
 - (b) the charging of a fine of not more than \$10,000.00 in addition to the recovery of costs associated with the correction of the violation; and
 - (c) the obtaining of a court order, should the owner or occupier of the land on which the violation has taken place refuse to provide consent to enter onto the lands or refuses any other action permitted to be requested by the Development Authority, as per the *MGA*.

Transportation and Economic Corridors Notice of Referral Decision

Municipal Development in Proximity of a Provincial Highway

Municipality File Number:	DP 082-23	Highway(s):	3, 2, 811, 2X, 3X
Legal Land Location:	QS-NW SEC-12 TWP-009 RGE-26 MER-4	Municipality:	Fort Macleod
Decision By:	Leah Olsen	Issuing Office:	Southern Region / Lethbridge
Issued Date:	2023-08-31 11:07:21	AT Reference #:	RPATH0037441
Description of Development:	See attached – proposed portable sign		



This will acknowledge receipt of your circulation regarding the above noted proposal. Transportation and Economic Corridors primary concern is protecting the safe and effective operation of provincial highway infrastructure, and planning for the future needs of the highway network in proximity to the proposed development(s).

Transportation and Economic Corridors offers the following comments and observations with respect to the proposed development(s):

Signs located inside corporate limits placed on private property do not require a permit from Transportation and Economic Corridors.

- Pursuant to Section 618.3(1) of the Municipal Government Act (MGA), the department expects that the municipality will comply with any applicable items related to provincial highways in an ALSA plan if applicable
- Pursuant to 618.4(1) of the Municipal Government Act, the department expects that the Municipality will mitigate the impacts of traffic generated by developments approved on the local road connections to the highway system, in accordance with Policy 7 of the Provincial Land Use Policies.

Please contact Transportation and Economic Corridors through the [RPATH Portal](#) if you have any questions, or require additional information



Issued by **Leah Olsen**, on **2023-08-31 11:07:21** on behalf of the Minister of Transportation and Economic Corridors pursuant to *Ministerial Order 52/20 – Department of Transportation Delegation of Authority*



COUNCIL SUBMISSION
Community Hall Rental Fee Waiver
New Business
September 11, 2023

[Title]

RECOMMENDATION:

That Council waives the rental fee for the Empress Theatre and Fort Macleod Pride fundraising event at the Community Hall, October 5, 2023.

DETAILS:

In the past Council has approved rental reductions and or full waivers of rental fees of Town facilities for a variety of community events, most often full waiver if the event is a fundraiser supporting local causes. Diamond Dinner, STARS Volleyball Tournament, Hockey Through the Ages, training sessions for not-for-profit groups.

PURPOSE:

Details attached.

FINANCIAL IMPLICATIONS:

Rental for this type of event would range from \$250 if rental is less than 8 hours, or \$500 if the full day is needed.

COUNCIL STRATEGIC PLAN:

This event supports Council's strategic plan by supporting Community, Arts & Culture and Relationship building and Town Infrastructure.

ATTACHMENTS:

Email request attached.

PREPARED & REVIEWED BY:

Liisa Gillingham, Director of Community & Protective Services

APPROVED BY:

Anthony Burdett, CAO



Diversity and Inclusion

RECOMMENDATION:

That Council directs administration to research diversity and inclusion workshops and bring back possible training opportunities for Council's approval.

DETAILS:

Council wishes to lead by example in living up to our community's slogan, "Belong." Recent events have caused some serious contention in our community and learning more about one's biases and how to see things from the perspective of others is valuable.

PURPOSE:

To allow for training opportunities for Council, staff, and possibly community members regarding diversity and inclusion.

ANALYSIS & OPTIONS:

Administration has reached out for some preliminary information from service providers in this industry to get an understanding of services provided and general costs.

FINANCIAL IMPLICATIONS:

The market rate for half-day or full-day training for this type of workshop is roughly \$2500-\$6000.

COUNCIL STRATEGIC PLAN:

How is this submission supporting Council's Strategic Plan, Vision, and Mission?

Vision: A vibrant, growing community full of opportunity.

Mission: To provide high-quality service in an efficient and responsible manner.

- This submission is building COMMUNITY in Fort Macleod. (Supporting priorities such as Safe Community, Social Responsibility, and Recreational Opportunities.)

APPLICABLE LEGISLATION:

ATTACHMENTS:

PREPARED BY: Anthony Burdett, CAO

REVIEWED BY: Anthony Burdett, CAO

APPROVED BY: Anthony Burdett, CAO