CITY OF HAMILTON
Procurement Section
Corporate Services Department
120 King Street West, 9th Floor
Hamilton, Ontario L8P 4V2

Attention: Donna Drozdz, Senior Procurement Specialist

Subject: Request for Proposal C11-12-12
Consultant Services Required for the Citizen Engagement of Values Based Infrastructure Management

Dear Ms. Drozdz,

Thank you for providing this opportunity for Dialogue Partners to submit our proposal to provide engagement services for the City of Hamilton’s values based infrastructure management program.

Our aim is to provide The City with the support tools and expertise to take the good work you are already doing as a leader in asset management and make it really great by incorporating the voices of the community, users of related services, staff and decision makers. We have extensive experience and specialization in the field of public engagement, and particularly on projects dealing with complex issues. We have worked on many projects that utilize the same skills required here for moving people through a learning journey of understanding what services they value and why, what choices they are willing to make, and what they would like to see for the future. A journey that will gather meaningful input that The City will be able to use to make informed decisions about its infrastructure.

We are excited about the opportunity to work with City staff, the community of Hamilton and Council on this unique project.

Yours truly,

Stephani Roy McCallum
Managing Director
Dialogue Partners Inc.
stephani@dialoguepartners.ca
CITY OF HAMILTON
Citizen Engagement of Values Based Infrastructure Management

CONTRACT NUMBER C11-12-12
FEBRUARY 16, 2012
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Part 1 – Project Introduction & Overview

This proposal outlines the development of a meaningful public engagement process that will allow the City of Hamilton to make sound decisions regarding the future of the City’s infrastructure. Embedded in this proposal is a means to enhance Hamilton’s public engagement policy through opportunities to practice principles of citizen engagement as established by the International Association of Public Participation (IAP2). Importantly, we commit in this proposal to helping and supporting the City of Hamilton enhance their relationships with key stakeholders and strengthen the fabric of civic involvement in the municipality.

Dialogue Partners would be delighted to work with an organization dedicated to hearing the voices of its citizens and incorporating what they’ve heard into making sound decisions about the future of this dynamic community.

In June 2010, the City of Hamilton received the “State of the Infrastructure Report on Public Works Assets – Phase 2”. In this document was a report card grading for each of the 11 asset groups under the responsibility of the City’s Public Works Department. These grades indicated the overall state of infrastructure, which included three management criteria:

- Overall physical condition of the infrastructure
- Ability of the infrastructure to meet capacity needs
- Adequacy of the current level of financing based on infrastructure needs

The scores for the Public Works asset groups ranged from B+ to D-, with an average overall rating
of C; where ‘B’ indicates minimum expectations are being met, and ‘D’ that there are shortcomings to varying degrees in one or more of the assessment criteria. Some of these ratings were up from previous years, and others were down slightly. The main factor influencing the scores was related to funding. The report noted that for the City to achieve higher scores it must have “funding sources that are reliable, sustainable and sufficient to address near and long term needs”. Additionally, the report identified that the future trend for 8 of the 11 asset groups is that the level of condition and service, and therefore rating, would remain status quo or decrease over time given the current programming, level of investment and practices. The costs to maintain the services provided include funding for annual operating and maintenance costs, and for infrastructure replacement at the end of its useful life.

The single largest asset group is Roads & Traffic, representing 32% of the City’s total assets. When combined with three of the other largest asset groups of Water, Wastewater and Stormwater, this represents more than 90% of the City’s total assets.

When this report was presented to The Public Works Committee, they wanted to know what could be done to improve the report card scores for all categories to B+. The answer to this question is that improving scores goes beyond the simple solution of increasing operating or capital funding to essentially the question of:

“How can we manage ageing infrastructure, build for the future, and deliver the cost-effective services that meet the needs of the current and future community?

This fundamental question affects, and is affected by, almost all of the City’s planning processes, and is an integral part of the City’s annual Corporate Priority Plans. The 2010 annual plan identifies priorities for delivering sustainable services with the identified challenge of “customer service the need for governments to better understand their citizens and find efficiencies in service delivery while ensuring satisfaction of those services is at the appropriate level”. Because at the end of the day, increasing or decreasing budgets is not an effective or efficient management strategy that will address the question of right service, level and cost.

This is a complex question and requires consideration of a number of areas in order to answer it completely, such as:

- What level of service should be provided by the City?
• What public values or issues affect that level of service?
• What are the costs of different levels of service?
• How does the public view the pros, cons and trade-offs of those levels of service?

Complex questions such as these require comprehensive answers gathered from a variety of sources. A public engagement process is needed to involve Council, City employees, citizens and the public in this important conversation. The City of Hamilton recognizes that a robust public engagement process that builds on existing best practices and operations will contribute significantly to the sustainability of the resulting decisions. This project intends to be a meaningful public engagement process that provides an opportunity to build relationships, demonstrate transparency, improve decision-making and yield better understanding of the complexity of infrastructure and related services for a major city.

This engagement process will focus on:
1. Sharing information, raising understanding and building capacity to participate in discussion on the City’s infrastructure / physical assets and related services;
2. Gathering input on stakeholder’s values, priorities and needs as they relate to City services and level of service delivered through this infrastructure;
3. Engaging participants in discussion on pros, cons and choices about the costs of building, operating, maintaining and improving the assets necessary to provide the quality of life valued by all Hamiltonians.

Upon completion of the public engagement process, the input gathered will be used to develop recommendations for measures and indicators for levels of service, and a plan to improve the ratings of City assets, based on public values. This approach will start the City along the path to improving City services and the public accountability for those services, and will contribute significantly to the sustainability of the resulting decisions.

The City has already made a major commitment to citizen engagement by incorporating into their Corporate Strategic Plan a vision that speaks directly to this.
Additionally, in the City of Hamilton’s Equity and Inclusion Policy (2010), a commitment to public engagement is identified:

"The Policy’s purpose is to enhance and strengthen Council’s decisions and to apply the principles of Equity, Inclusion, Diversity and Public Engagement to all City of Hamilton’s processes, policies, practices, corporate strategic plans and departmental goals in ensuring beneficial outcomes and improved quality of life for all of the City’s internal and external stakeholders."

The City is taking these commitments to meaningful and effective public engagement seriously and has made several significant steps to create an organization that reflects this in order to meet these commitments. We propose that several of these steps be carried out jointly with this project, in order to assist the City to further develop its public engagement policy, support implementation of an associated governance structure, support a culture and practice of public engagement and build public engagement capacity of both Council and City staff through practical experience and training.

This project represents a comprehensive and coordinated strategy that will bring together City employees, Council and citizens in conversation about the foundational structures through which City services are delivered, as well as the levels of City services that current and future
Hamiltonians value, and are prepared to pay for. At the same time as accomplishing these project specific aims, we propose to support both the City and citizens in ongoing capacity building, skills and experience in citizen engagement.

Part 2 – Our Approach

The Dialogue Partners’ team brings together the very best in the public engagement fields, with experience, profile and credibility. We have assembled highly skilled, experienced and accomplished team members and associates to bring you best practices public engagement, that will assist the City of Hamilton in a productive conversations relating to infrastructure service delivery, and support informed decision-making by senior management and City Council.

For this project we have assembled a team of 11 public engagement practitioners, each bringing their own areas of expertise and specialization. We want to ensure that we tailor the project specifically to the needs of Hamilton. For this reason, seven members of our team are located in Ontario, work extensively in and around the Hamilton area and three live in Toronto. They have an understanding and sensitivity to local issues. Their experiences, knowledge and relationships with your community will help us find those organizations and individuals who will support, encourage participation and help us achieve success. For more information on these people and what they bring, please see Part 5 - Our Team and Experience.

At Dialogue Partners, we bring people together, physically and literally, by creating spaces to facilitate important conversations on complex issues, with a focus on building common ground and making sustainable decisions. Our work has involved complex and complicated issues with thousands of participants over many months and years. We have an international reputation for delivering some of the most innovative and successful projects in the field.

We have worked on projects in Canada, the USA, Europe and Australia and have dealt extensively with local government and municipal issues, along with health, environmental, regulatory and other complex issues. We have learned through our extensive work with municipalities and local government that resources and budgets are finite, and any work done in this field must maximize the limited availability of funding.

We know and understand people and their issues and concerns, and we have a proven track record of working with people to understand what matters to them, to help them consider and understand complex issues and offer informed perspectives, supporting organizations to make sustainable decisions in challenging situations.

We ground our work and our company in the values we believe in personally and professionally.
We think that in the end this work is based on a foundation of trust, respect and caring, and that requires a deep core of values.

Our values include:
- Integrity, honesty and accountability
- Compassion, empathy and generosity
- Inclusion and outreach, bringing people together, encouraging them out of their “silos”
- Embracing emotion and creating space for the hard conversations, whatever they are
- Building capacity so people can talk to each other in an open, respectful, meaningful way
- Giving back - of our time and energy, to people and organizations that build community
- Caring for the earth
- Celebrating family and community

OUR PUBLIC PARTICIPATION PHILOSOPHY

This engagement process is built on 2 solid foundations:

A. Guiding principles created for this complex, important conversation with citizens and staff
B. City of Hamilton’s Principles of Citizen Engagement

These foundations will provide the “frame” for the conversation:

“How can we manage ageing infrastructure, build for the future, and deliver the cost-effective services that meet the needs of the current and future community?

A. Guiding principles for this complex, important conversation

We’ve reviewed the Request for Proposal, spent time reflecting on the project complexities, issues and impacts at play, thought about our experience and lessons learned, and identified a number of principles that we propose to use to guide the solution and activities for this project.

The principles serve as the solid foundation for all activities in the project and our approach to the deliverables is based on these guiding principles. They include:

Values AND Facts
Helping all stakeholders to engage in a productive discussion and see common interests is critical to developing recommendations that are sustainable and will ensure real understanding and education amongst participants.

A well-designed and facilitated engagement process encourages participants to:
- readily identify their interests;
- explore the values they bring to the discussion that will support development of options for a path forward;
- reach common ground; and
- gain a deeper understanding of various perspectives.

We recognize the critical importance of providing information, raising awareness and understanding of the multiple issues related to infrastructure, services, level of service and cost. However, we also know from our extensive experience, that a meaningful process on a complex issue like whether the City is delivering the right service, level of service, at the right cost, will require a balance of facts and values.

We believe that Values + Facts = Deliberation

We will engage people in values based discussion about what is important to them, in a way that makes room for their needs and interests, while we provide information about the issues. Once participants have some experience in talking together in a different way and what is most important to them has been shared, then we work to increase knowledge and provide necessary information in a way that supports deliberation on key issues.

A simple diagram below illustrates our Strategic Dialogue Model©.

![Diagram](attachment:image.png)

The idea is to “drill down” from the very narrow level of “positions” to establish a broad base of support for action that is based upon common ground or common interests.

Our highly experienced facilitation team has the ability to listen actively, to discern key points of
view from potentially provocative statements, to summarize converging interests, and to help suggest steps forward in areas where agreement is not easily found. Our facilitators are able to use their neutrality and experience to build a respectful engagement environment, to take non-partisan action to balance dialogue in difficult circumstances, to diffuse potentially sensitive situations, and to ensure adherence to the ground rules for engagement.

Our facilitation team will work to ensure that all stakeholder interests are made explicit so that they can be discussed and compared across stakeholder groups. The facilitation team will carefully capture viewpoints to summarize areas of convergence and divergence. We have employed this values based approach on multiple complex issues with diverse stakeholders.

**Staff AND Public engaged in conversation**

While many engagement projects focus on external stakeholders and the public to gather input for decision-making, we will also focus on engaging internal staff, who have wisdom and experience about the issues under discussion. We propose that staff be engaged in the conversation in similar ways, at the same time, as the public and stakeholders are engaged. This will ensure that their wisdom is collected and considered, and that any resulting recommendations and decisions are sustainable, with extensive experience for implementation.

**Extensive Communication & Outreach**

While a values-based, meaningful engagement process is critical, the only way to ensure participation by citizens, staff and stakeholders is to develop and implement a comprehensive, fulsome communications process. Use of a wide range of tools, tactics and avenues for communication and outreach are required to ensure inclusive participation.

Traditional communication and engagement approaches are focused on reach over richness. By this we mean that many approaches, tools and projects are based on one of two premises:

1. If you have extensive reach in terms of numbers of participants, the ability to engage those multiple participants in rich conversation and deep understanding and deliberation of the complex issue at hand is just not possible OR
2. If you have a rich conversation and deliberative process that engages people in discussion about their issues, concerns and values you invariably need to limit the reach or number of participants.

Our track record and experience demonstrate that the most meaningful, effective and sustainable engagement processes have high levels of reach AND richness. Our approach to this project is founded on this premise.

**Representation + Inclusion**

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While many engagement projects focus on partners, organizations and representatives, or even go so far as to ensure participation by a representative sample, we believe meaningful engagement must include representation AND inclusion.

Creating an environment where you have the tools and materials to reach out to, identify and engage those who may have an interest, who may be affected, and who are unaffiliated or unrepresented is crucial to a meaningful process and to gathering diverse, fulsome input. We have learned through experience that the stories we hear are different from the representatives or targeted stakeholders than from the individuals themselves. This diversity of input also provides decision-makers like elected officials the breadth of input that they need to make long-lasting decisions.

That means in the engagement plan we may propose methods, tools and approaches that allow for multiple voices and views to be heard. This will ensure that their wisdom is collected and considered, and that any resulting recommendations and decisions are sustainable, with extensive experience for implementation.

For example...

In all of our projects, we very carefully select the techniques and methods we use in order to ensure we balance opportunities to allow for a diversity of participation. In this project, the outcomes will be improved, and the decisions more informed and richer, along with resulting relationships and capacity if the techniques are not based exclusively on representative process, like an Advisory Committee, Focus Groups, Citizen’s Panel or a Deliberative Poll.

Other techniques we may suggest might include appreciative inquiry interviews and an appreciative inquiry summit like we did in the development of the City of Edmonton’s People Services Plan; Open Space Technology like we have done for the City of Burlington, Canadian Blood Services and Health Canada; World Café like we have done for the Ontario Physical Health and Education Association and the Region of Halton Health Department; or innovative online tools and techniques like we have employed for Edmonton Public Schools or the City of Calgary.

Relationships, trust and credibility

This is your work, and your relationships with stakeholders. Many times when organizations hire consultants, they come and provide expert advice, and when they leave the organization has received a deliverable, but has not necessarily gained more skills, knowledge or improved relationships with the people they serve. Our goal is that when our work is done, the City of Hamilton will have stronger stakeholder relationships, improved skills, knowledge and capacity, and tools and materials to continue the work when we are finished our partnership with you. We will bring our skills and experience to this partnership project and focus on planning and implementing an approach that builds trust and
credibility.

For example...

We have extensive experience engaging participants on complex, complicated and emotional issues where passion and potential impact are high. Issues such as nuclear waste, school closures, the Edmonton City Centre Airport, municipal budgets: these conversations require a context, content and information, but they are effective only if the primary focus is placed on the values, vision and emotions of participants.

Online and face to face

The engagement process needs to reflect the realities of the world today – and that means both online components and interaction as well as face to face events and opportunities need to be utilized.

Critical to the success of engagement on a complex issue like this one will be the ability to reach beyond the usual participants, at the usual kinds of meetings, invited in the usual ways - to achieve something different, lasting and sustainable. We believe that we can work with the City of Hamilton to engage participants in a way that supports them in telling their stories, and identifying their issues and concerns, and their choices, preferences and priorities so that decisions that are implemented are successful and sustainable.

We will propose innovative online technologies and tools appropriate to the (like Community Priorities, YouTube, mobile apps or others), and help you to create environments at your face-to-face meetings that encourage a thoughtful and constructive kind of participation.
For example...we have tailored projects to meet the needs of the community we were in:

In working with the City of Ottawa to develop their Public Participation Policy, we wanted to ensure we heard the voice of the “hard to reach”. That meant spending a number of days and evenings sitting in homeless shelters and food banks, and hanging out on street corners, talking to service users. While we could have talked only to service delivery staff, or organizational representatives, we learned that the stories we heard are different from individuals than from representatives.

In working with the City of Calgary on a budget engagement project, we took video cameras to the Calgary Drop in Centre and the Mustard Seed (a homeless shelter) to ask service users directly for their thoughts, input and views on the services that make a difference in their lives. These videos were posted to YouTube for all to hear the stories, along with the videos of many other participants. In addition, we hosted, coordinated and facilitated face-to-face and online engagement opportunities for City staff, community organizations, individuals, youth, seniors, new Canadians and more.

For Edmonton Public Schools sector planning review, we facilitated meetings with Korean, Chinese and Vietnamese communities with support from community animators and interpreters. We worked with school staff, parents, community groups and residents and the City to broaden the conversation.

For the World Water Forum in Istanbul, Turkey, we facilitated sessions in the eight languages of the UN, using interpretation. For the International Development Research Centre, we facilitated workshops with researchers from developing countries on tobacco control guidelines, supporting attendees to contribute in one of six languages.

Value for Money

We have worked extensively with government organizations in Canada, the U.S.A, Australia and New Zealand. We know that value for money is a critical deciding factor in what work gets done, how it gets done, and whom you choose to partner with. We have worked on some large-scale, high profile public engagement projects. But we have also worked on some of the smallest projects (in terms of cost and financial return) but the most rewarding in terms of long lasting impact. We have tried to price this project as economically as possible, recognizing the importance of ensuring the City can demonstrate value for money to citizens. We welcome the opportunity to work with the City of Hamilton, and to negotiate, discuss or amend our proposed budget should it not meet your needs.

For example...

In our Qikqtani Truth Commission project, we trained community members as facilitators and conversation hosts for community conversations in remote Baffin Island locations, placing the conversation in the hands of those who lived in the communities and who spoke Inuktitut. This increased individual and community capacity and provided meaningful input to the project while reducing costs.

In our Canadian Commission for UNESCO project, we trained NGO and Youth representatives to host and facilitate small group conversations, and to gather and record input. This reduced costs for the project, and increased the long-term capacity of stakeholders for constructive participation with the organization.
Adding value to the great work you do

We believe in building capacity, and in leaving the organization stronger when we are done than before we came. That means we also leave behind some tangible tools. We think this adds real, tangible value to working with Dialogue Partners over another firm, and we have identified a number of value added items that will add long lasting benefit to the City of Hamilton. These include:

- **Peer Review** – with our network of internationally recognized experts, we propose to bring Past Presidents of the International Association of Public Participation (IAP2) International together (virtually) to provide input and comment on the public engagement plan that is developed as well as the results of monitoring. Including Stephani Roy McCallum of our team (2008 IAP2 International President), we will engage Scott Russell (2007 IAP2 International President and a professional planner) and Anne Pattillo (2008 IAP2 International President and an expert in culture change and transformation) to provide peer review of the work we do in partnership with you. (There is a small fee for this item, noted as optional in the budget.)

- **Internal training to build skills and knowledge for implementation** – Dialogue Partners are experts in building the skills, knowledge and capacity of other people. We are able to offer three IAP2 certified courses to the City of Hamilton staff: 1) Public Participation for Decision Makers Workshop; 2) Certificate in Public Participation 5 day training program; and 3) Emotion, Outrage and Public Participation 2 day training program. In addition, we can bring you training that will specifically support the future implementation work staff may do in this or other projects, including Dialogue Partners Group Facilitation Skills for Public Engagement 2 day training program; Dialogue Partners Analyze This! Understanding Conflict in Public Engagement 1 day training program; and other Dialogue Partners ½ day workshops such as Stakeholder Identification and Issues Assessment or Specialized Techniques for Public Engagement.
- **IAP2 Public Participation for Decision Makers Workshop**
  Training delivered to Council and Senior Management Team along with a Workshop on risks, concerns and commitments related to the public engagement process.

  **Our Gift to the City of Hamilton: Training to Build Skills and Knowledge**
  To support the long-term capacity of the organization we propose to provide both the Public Participation for Decision Makers Workshop and the 5-day IAP2 Certificate in Public Participation at **NO EXTRA COST** beyond licensing fees.

- **Developing The City of Hamilton’s Public Engagement Policy**

  **Our Gift to the City of Hamilton: A Public Engagement Policy**
  As part of Dialogue Partners’ commitment to building capacity, we will for **no additional charge** support the City of Hamilton in building upon its existing commitment to the IAP2 principles of public engagement and further develop a comprehensive public engagement policy that will continue long after the life of this project.

  The City of Hamilton has already undergone some preliminary work in adopting the principles of public participation as defined by the International Association of Public Participation (IAP2). We believe this strong commitment by the City, coupled with an opportunity to practice these principles during this engagement project, will help the City to build the capacity necessary to strengthen their engagement policy and fully test its functionality.

  As part of our initial engagement process design, we proposed to work with the City to review and fortify their public engagement policy. During this engagement process on City services and infrastructure, the City will have an opportunity to evaluate the effectiveness of this policy and make any necessary adjustments. Dialogue Partners, along with the City, will help to ensure the policy meets the public engagement needs of the municipality and its citizens. Once finalized, Dialogue Partners will assist the City with implementing the policy, to ensure this policy becomes a fully integrated with City operations.

**Human face of a “dry” issue**

While critically important, City services, level of services and cost of services tends to be on the “dry” and technical side. We believe the key to connecting this important issue with citizens, staff and Council is to focus on services as an expression of community values and priorities. Connecting people to infrastructure as “the solid foundation from which we build” and City services as the current and future environment in which Hamiltonians “Live, Work, Play & Learn” will be useful as a focus for engagement, along with the key focus question.
**Building Capacity**

Education and awareness on these complex issues are core components of this project. This means supporting people to learn and understand so they can engage in a meaningful way.

This also means supporting participants (citizens, staff and Council) with tools, skills and understanding of deliberation and dialogue on this complex issue. People are not born knowing how to talk to each other about "hard' issues in a meaningful, open way – we will build skills for hosting and convening these important conversations as part of this project. That way, the next hard conversation will involve participants who have been involved in a different way, and support the capacity of the entire community to talk together on important issues, long after we have been involved.

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**For example...**

We have extensive experience and an international reputation for building the capacity of individuals and organizations:

- Stephani Roy McCallum is an IAP2 Assessor / Coach of new candidate trainers for the IAP2 Certificate in Public Participation and IAP2 Emotion, Outrage & Public Participation training programs. She is one of only 4 people in the world qualified to serve in this role, supporting candidate and newly licensed trainers to deliver the quality learning experience IAP2 is known for.

- Dialogue Partners team has developed some of the most widely used and most recognized Public Involvement toolkits in Canada including one for the Canadian Environmental Assessment Agency on Public Involvement Guidance for Environmental Assessment. These materials can be found on the CEAA website at http://www.ceaa.gc.ca/default.asp?lang=En&amp;n=46425CAF-1&amp;offset=6&amp;toc=show

- In addition, we have created Public Involvement Frameworks, Toolkits and Policies for Health Canada, Environment Canada, the City of Hamilton, the City of Ottawa and others.

- Our team has worked extensively with local government organizations to build on what they do best, supplementing that with best practices in the field and created workshops, seminars, webinars and learning materials to build their capacity on specific items such as: Identifying and resolving conflict; Stakeholder identification and issues assessment; Culture and diversity in public engagement; specialized public involvement techniques such as World Café and Deliberative Forums; Leadership and Public Engagement; among many others.

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**Link between input and decision-making**

It is critical to building trust, relationships and better decisions that the conversations that take place are intentional, occur with a purpose, and are linked to decision-making. That means being clear about the level of influence the public will have on the final decision, setting indications of public role and expectations, and considering the input in development of recommendations.
B. City of Hamilton’s Principles for Citizen Engagement

The City of Hamilton is fully committed to advancing a citizen centered government that effectively engages its residents in the decision making process. Along with this commitment, the City has adopted guiding principles for citizen engagement based on the principles of the International Association for Public Participation (IAP2). IAP2 describes meaningful consultation as requiring three key foundations or elements:

1. A clearly defined goal or objective
2. A link between a consultation process and a resulting decision, or a clear focus
3. A values-based process

The Dialogue Partners principled approach includes all three of these elements of meaningful engagement. In addition to these key foundations, we’ve noted IAP2’s Core Values in the table below, along with the Guiding Principles we propose to use for this project. You can see by the side-by-side comparison, that we don’t just teach people about the Core Values, we embody them in our work. We also take them further than IAP2, by including two principles important to this project: building capacity for participation; and building relationships and connections.

<table>
<thead>
<tr>
<th>IAP2 Core Values</th>
<th>Dialogue Partners Proposed Guiding Principles for this project</th>
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<tbody>
<tr>
<td>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.</td>
<td>Commitment and Accountability – Ensuring we are responsible to participants, and the County and developing clear communications that outline the role of participants in the process and their ability to influence the issues under discussion, and documenting how commitments are being kept throughout the project.</td>
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<tr>
<td>Public participation includes the promise that the public’s contribution will influence the decision.</td>
<td>Engaging about Values and Facts and going beyond the “usual” – Through extensive outreach and meaningful process, we will develop a plan that identifies all potential participants in constructive conversations about issues that matter to them, in ways that embrace and connect people. We will embed online and face-to-face techniques and opportunities in the plan, as appropriate.</td>
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<td>Public participation promotes sustainable decisions by recognizing and communicating the needs and interests of all participants, including decision makers.</td>
<td>Inclusion &amp; Representation – Ensuring a comprehensive and inclusive outreach and engagement program that provides multiple opportunities for diversity of perspective, viewpoint and experience. We will propose a variety of techniques that City staff can implement in a meaningful way.</td>
</tr>
<tr>
<td>Public participation seeks out and facilitates the involvement of those potentially affected by or interested in a decision.</td>
<td>Engaging participants to improve the process – Through needs analysis and assessment, and in consultation with the Project Team, we will develop, refine and adjust the engagement process throughout the project.</td>
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<td>Public participation seeks input from participants in designing how they participate.</td>
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<tr>
<td>IAP2 Core Values</td>
<td>Dialogue Partners Proposed Guiding Principles for this project</td>
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<tr>
<td>Public participation provides participants with the information they need to participate in a meaningful way.</td>
<td><em>Raising awareness and understanding of the issues and the process</em> – We will provide advice and input on how to ensure easy to understand, accessible, balanced material that shares information on the opportunities to participate and raises awareness on substantive issues.</td>
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<td>Public participation communicates to participants how their input affected the decision.</td>
<td><em>Openness, transparency and accountability</em> – in reporting back on the process, activities and results of monitoring.</td>
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<td></td>
<td><em>Building capacity for participation</em> – Working with City staff and the Project Team to build skills, capacity, and knowledge for public engagement and facilitation.</td>
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<td></td>
<td><em>Building relationships and connections</em> – Throughout the process, we will support development and monitoring of a public engagement process that builds trust, credibility and long-term relationships.</td>
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**For example…**

Our team has extensive experience with IAP2 serving in leadership roles at the International, National and Provincial levels. We are not just members and practitioners, and our team includes two licensed trainers of the IAP2 Certificate Program in Participation. In addition, one of our team members is the lead developer, licensed trainer and Assessor of new candidate trainers for IAP2’s Emotion and Outrage training program. That same team member is also an IAP2 Assessor, Coach and Mentor for new candidate trainers of the IAP2 Certificate program in Public Participation, 1 of only 4 in the world.

From 2005 – 2007, a team member was the Canadian Regional Coordinator for an international research project funded by IAP2 and the Kettering Foundation entitled “Painting the Landscape – the cultural context of public participation.”

In 2009, a team member co-led a collaborative discussion with other groups in the field to create the Core Principles for Public Engagement, presented to the Obama White House Office of Public Engagement.

Our team includes the 2008 President of IAP2 International, a Board members for IAP2 Canada, 1 member of IAP2 Wild Rose Chapter (Alberta) Board of Directors, and a member of the IAP2 Canada Member Services Committee.
Part 3 – Engagement Activities and Timelines

The engagement process will be built on an integrated and phased approach where we confirm the plan and approach for a meaningful engagement process, then gather input on meaningful process and information needs, then talk about valued and priority City services and infrastructure and finally, focus on making choices related to those values.

We have key tasks that must be accomplished in order to do this:
- Complete the development of the engagement, communication and evaluation plans and associated infrastructure (website, database, development of materials & tools)
- Implement those plans – gathering the input from participants that will be considered and used in decision-making
- Record, reflect and report on that input in a way that is useful for decision-making

Together, the Engagement and accompanying Communications Plans will identify a focus and associated goals, with application through all phases of the project. The broad based goals will inform the specific communications and engagement activities and objectives that follow. The goals, specific activities and objectives will in turn provide evaluation indicators and measures that will be used to determine the success of the project and are detailed further in the Evaluation Plan.

This public engagement plan will need to provide a variety of ways in which a wide range of interested and affected stakeholders can be involved and provide input on both City infrastructure and services and concurrent discussion of the City’s future engagement activities.

ENGAGEMENT FOCUS:

LIVE, WORK, PLAY & LEARN: BUILDING FROM A SOLID FOUNDATION
“How can we manage ageing infrastructure, build for the future, and deliver the cost-effective services that meet the needs of the current and future community?”

PROPOSED PUBLIC ENGAGEMENT GOALS:
The engagement process is committed to:
- Raising awareness and understanding the City infrastructure, services, costs and related issues.
- Providing relevant information so that all participants can participate in a meaningful way.
- Gathering input from all participants that will be used and considered in decision-making
- Providing opportunities for meaningful and appropriate engagement of staff, citizens, Council and a wide diversity of stakeholders.
• Delivering a transparent, accountable and inclusive engagement process that builds relationships, trust and credibility with organizations, stakeholders and citizens.
• Building internal and external capacity, skills and knowledge for full participant and future public engagement.

PROPOSED COMMUNICATIONS FOCUS:
Raise stakeholders’ awareness in understanding the substantive issues to support them in fully participating in the engagement process.

PROPOSED COMMUNICATIONS GOALS:
The communications process is committed to:
• Raising awareness and understanding among all stakeholders about the appropriate level and cost of City services and infrastructure.
• Building understanding and awareness of the complexity of the issues under discussion.
• Developing and distributing relevant and easily understood communications material through a variety of appropriate channels.
• Build community relations by being open, honest and transparent, as well as responsive to issues that arise throughout the project and encourage open lines of communications between the City of Hamilton and the public.
• Provide information about how the public’s input has been used in the decision-making process.

Outlined below are specific engagement activities that we propose to be implemented over the steps of the project:
Phase 1 Planning the Process
MARCH 2012

Step 1 of the first of four phases will be the foundation for all subsequent steps and future phases of this project. Our extensive experience has shown that taking the time at the start of the project to be clear on goals, objectives, potential risks, mitigations strategies and measures of success will ensure a meaningful and effective process over the course of the engagement journey.
<table>
<thead>
<tr>
<th>Timelines</th>
<th>Intended Outcome &amp; Deliverables</th>
<th>Methods &amp; Activities*</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 2012</td>
<td>✓ To confirm a meaningful, responsive engagement and communications plan that will guide communications for the project.</td>
<td>• Research and Review</td>
</tr>
<tr>
<td></td>
<td>✓ To develop and implement the project management and schedule to support project implementation.</td>
<td>• Stakeholder Identification</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Identify partners and grassroots based organizations to work directly with</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• One-on-one interviews with Council</td>
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<tr>
<td></td>
<td></td>
<td>• Issues Assessment</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Draft and confirm engagement, evaluation and communications plans, approach and strategies:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Gather input on draft plans from project team, departmental representatives, Corporate Advisory Team and Council</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Finalize plan, gain approval of plan, and make elements of plan public</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Develop and build project infrastructure</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Stakeholder Database</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Identify and prepare: roles &amp; responsibilities; gantt chart; logistical arrangements</td>
</tr>
<tr>
<td>March 2012</td>
<td>✓ To develop materials to provide stakeholders with information about the public engagement approach, objectives and opportunities.</td>
<td>• Develop process design for Phase 2 activities</td>
</tr>
<tr>
<td></td>
<td>✓ To develop materials for use in public engagement activities to support the process and participation.</td>
<td>• Prepare materials that will raise understanding about the complexity of issues under consideration, for use in Phase 2 and Phase 3 conversations.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Preliminary stakeholder database use protocols developed; existing data entered and coded</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Web site creation and content development</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Social Media tools created and content developed</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Mobile App, usable across three platforms of smart phones, created</td>
</tr>
</tbody>
</table>
March 2012 ✓ Engagement materials and tools developed that inspire conversation, provide valuable information and inspire creative thinking and that increase understanding about the substantive issues.

- Electronic newsletter system prepared with template and contacts
- Prepare engagement materials for project launch – overview of process, focus of process, opportunities to be involved

March 2012 ✓ To build Council and Senior Management Team’s understanding and knowledge of current best practices and techniques for public engagement processes and support and ownership of this engagement process

- Questions for Online Survey created
- Questions for mobile apps developed
- Online engagement tool developed
- Develop Complaints procedure and identify Community Ombudsman / Engagement Team to monitor engagement process and work with us to resolve complaints.

IAP2 Public Participation for Decision Makers workshop delivered

*Methods & Activity Descriptions:

Research and Review

- Of previous engagement work, materials and studies conducted on this topic as well as discussion of potential partners, stakeholders and proposed approaches and methodologies with the City of Hamilton project team.

Stakeholder Identification

- To identify the main groups, both internally and externally, determine their main concerns, issues and points of reference, as they are known at this point in the project. This will include those beyond the usual suspects, as well as those affiliated or represented. We will take measures to ensure the database includes groups, organizations and individuals from all
perspectives, backgrounds, income and education levels, ethnic and gender etc. We will identify potential partners to work directly with on this project, in order to extend the reach and potential input of a wide range of participants.

Conduct 1-on-1 interviews with Council and Senior Management and External Stakeholders
• To identify experiences about past engagement processes, what good public engagement means to them, potential interested stakeholders, and their issues, concerns and suggestions with respect to this project.

Issues Assessment
• Established through conducting interviews with key stakeholders to gather information about issues, concerns, suggestions, general level of awareness and/or understanding and other items that could impact the success of the project. An Issues Analysis will be prepared from the information gathered through the interviews and inform Phases 2 and 3. This activity will also play a critical role in identifying potential emotion, outrage or controversy that may arise in project discussion and will assist the team prepare adequate mitigation measures and techniques.

Engagement Plan
• Developed based on our research and conflict assessment. Input from the project team, Corporate Advisory Team, Departmental Representatives, Senior Management Team, and Council will be used to refine and finalize the Engagement and Communication Plan.

Complaints Process and Engagement / Advocate Team
• Propose a step-by-step complaints process and gather input on the process via survey, as well as putting out a call for volunteers who would serve as an “Engagement Advocate Team” to monitor the engagement process, provide feedback on how process is meeting objectives, and represent citizens and the community in any concerns or situations of complaints. A sample complaints process for this project might look like the one noted below.
Sample complaints process

- We would ask participants to comment and confirm on how this process would work:
  - Identify your issue or concern with the engagement process or project
  - Review the engagement objectives and goals
  - Look at the measures and indicators of success
  - Provide your complaint, comment, concern or question in writing outlining a) what happened b) what concerns you c) if there is a relationships to the process engagement goals or indicators of success

We commit to:

- Full transparency and accountability in the reporting and resolving of all comments, issues and concerns so that all submissions received, and all answers and responses provided are provided to all participants at the same way and at the same time
- Ensuring that all participants are treated fairly, equally and with care and compassion in this process
- That all voices are weighted equally and that all participants are treated with respect
- That privacy and identify is protected, except where explicit permission is provided
- Identifying an Engagement Advocate who will monitor our response and resolution of the process
- To ensuring that the principles of the engagement process are implemented fully and to the best of our ability, and that we are held to account
- Ensuring that all participants evaluate the engagement process itself to determine its success, rather than our team determining that success, and that the Engagement Advocate Team lays a vital role in this process.

Project Infrastructure

- To support both the engagement activities and the management and reporting of the project.

Stakeholder database

- Using an excel database, identify stakeholders and their issues, interests and values. Updated regularly over the course of project and use for engagement, outreach and communication purposes. The database will be compiled by lists and contact information provided by administration, community groups and Mayor and Council, as well as external research and discussion with partners and community organizations. We are taking and will continue to take measures to ensure the database includes groups, organizations and individuals from all
perspectives, backgrounds, income and education levels, ethnic and gender etc.

Website Creation
• Develop project infrastructure and content that will raise awareness of the project, its objectives and approach, and to prepare stakeholders for upcoming opportunities to participate.
• Infrastructure will allow for complaints, questions, concerns and positive feedback to be received and responded to in a public way so that everyone receives the same information both from others in the community and from The City.

Social Media and Mobile Apps
• Develop project infrastructure to facilitate conversations with stakeholders not always engaged in conversations with the City of Hamilton. Assist in accessing the silent majority through YouTube, Facebook, Twitter. Establish City channels that can be used after this project
• Create mobile apps for use on smart phones to engage a wide variety of stakeholders, with specific emphasis on youth and busy/active stakeholders.
• NOTE: this will be created in Phase 1, but not implemented until Phase 2

Cityscape online tool / Cityscape Value Maps for use in face-to-face sessions
• A visual educational tool where participants can provide their views and priorities about the “solid foundation” of the City for each infrastructure asset group, learn information about the infrastructure and related services. Additional information detailing the infrastructure and services will accommodate the pictorial, and participants can rate and rank infrastructure groups as well as provide input on what they would like more or less of. Versions of this will be designed and developed electronically and also printed in hardcopy.
• This tool will work especially well for youth, new immigrants, and “those who want to participate late at night in their pajamas”.
• NOTE: this will be created in Phase 1, but not implemented until Phase 2

IAP2 Public Participation for Decision Makers Workshop
• Training delivered to Council and Senior Management Team along with a Workshop on risks, concerns and commitments related to the public engagement process.

Phase 2: Building From a Solid Foundation
APRIL - MAY 2012
Once the planning work is complete, in phase 2 the public communications and engagement activities will commence. This phase is very much about building stakeholder capacity for engagement and emphasis will be placed upon developing citizen understanding and increased awareness of the engagement process, City services and substantive issues. During this phase, transparent and accountable reporting of results of all engagement activities will help to build public confidence and trust in the process, which is necessary for building relationships and partners.

**Take a look at our work:**
Dialogue Partners is experienced at creating and developing engagement processes and effective communications tools. We are proud of the work we have done want you to have a feel of what is possible. Take a look at these examples:

Here is a link to view an example of a video we created for launching the final phase of the City of Calgary budget engagement process to inform Calgarians what we had heard so far along the way, highlights of the input related to values and priories and to encourage participation.

http://www.youtube.com/watch?v=-g-13XT1-Zk

We also used banner ads to help promote the Calgary budget engagement online:

For an example of notifications or advertisements, please see Appendix A – Work Samples.

<table>
<thead>
<tr>
<th>Timelines</th>
<th>Intended Outcome &amp; Deliverables</th>
<th>Methods &amp; Activities*</th>
</tr>
</thead>
</table>
| April 2012| ✓ To raise awareness of the public engagement process, the objectives and approach, and to inform and prepare stakeholders for upcoming opportunities for participation | - Website and Social media launch  
- Internal and external distribution of materials, facts and information through a variety of tools and approaches (video, fact sheets, newsletters, materials through |
<table>
<thead>
<tr>
<th>April – May 2012</th>
<th>Engage stakeholders in a meaningful values and principles based conversation to identify issues and interests related to meaningful engagement and City infrastructure and services. These issues and interests will be used as a “frame” for the discussion of options or approaches in phase 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓</td>
<td>• Taping and posting of videos on Foundation TV</td>
</tr>
<tr>
<td></td>
<td>• Train and connect Photovoice with targeted groups</td>
</tr>
<tr>
<td></td>
<td>• Partner with community groups</td>
</tr>
<tr>
<td></td>
<td>• Launch youth engagement program</td>
</tr>
<tr>
<td></td>
<td>• CityScape Workshops to gather input on meaningful engagement and values and priorities related to infrastructure and services, with use of Zing technology *(separate sessions for both community and employees)</td>
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<tr>
<td></td>
<td>• Community Priorities Mobile app</td>
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<td></td>
<td>• Social media engagement</td>
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<td></td>
<td>• Meetings with partners, organizations and groups as needed</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>April – May 2012</th>
<th>Engage Council and staff and gather feedback on process and provide updates on process</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓</td>
<td>• Check-in with Council</td>
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<tr>
<td></td>
<td>• Check-in with Senior Management Team</td>
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<tr>
<td></td>
<td>• Prepare Council for Hosting events and/or activities in their wards</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>April – May 2012</th>
<th>Engagement materials and tools developed that inspire conversation, provide valuable information and inspire creative thinking and that increase understanding about the substantive issues</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓</td>
<td>• Process design for Phase 3 developed</td>
</tr>
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<td></td>
<td>• Develop materials for Phase 3 engagement</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>May 2012</th>
<th>Provide analysis and summary of stakeholder input from Phase 2 and use as a foundation for</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓</td>
<td>• What Was Said reports from engagement activities (online survey, workshops, etc)</td>
</tr>
</tbody>
</table>
**Table: Conversations in Phase 3**

<table>
<thead>
<tr>
<th>April – May 2012</th>
<th>Build corporate capacity for meaningful engagement on an ongoing basis</th>
</tr>
</thead>
</table>

- Draft analysis and summary of results
- Develop recommendations based on summaries and themed input from stakeholders
- Stakeholder database updates (ongoing)
- IAP2 Planning course (2 day pre-requisite course)
- IAP2 Communications course (1 day)
- IAP2 Techniques course (2 days)

### Methods & Activity Descriptions:

**Foundation TV**
- Video stories from citizens, staff and Council recorded by appointment, live and at kiosks at pre-determined times in City infrastructure facilities and locations with the goal of identifying what infrastructure and services citizens value and why. This tool will be used to target input and feedback from marginalized and hard to reach populations.

**Photovoice**
- Photovoice is a visual engagement tool that uses photography for individuals to express their perspective. Participants provide innovative ideas, suggestions and priorities related to infrastructure and services but instead of words, images are submitted. This process reaches out to segments of the community who may not participate in traditional engagement activities. University or College students can partner with poverty or immigrant groups to help create a visual narrative.

**Partner with community groups**
- Public Engagement is about more than just hosting events for those who would normally show up. Meaningful public engagement is about reaching out to those people who may not normally participate, for example marginalized populations such as New Canadians, or impoverished women, etc. Partnering with community organizations and asking them to host workshops to increase reach and participation. Organizations like St Josephs Immigrant
Launch Youth Engagement program
- Partnering with Hamilton Youth Advisory Committee to develop a youth engagement program. Build engagement capacity skills with Advisory committee members. Develop youth focused workshops or events. Set up possible meet-ups at the Turner Skate Park, or library. Work with YMCA and other youth groups to host events.

CityScape and Services Workshops (Community and Staff)
- Workshops, using the CityScape and Services tool, designed to bring together large groups of participants face to face to: 1) gather input on City engagement process in general, opportunities to participate, values and interests related to engagement indicators; and 2) identify values and priorities of City services and infrastructure.
- After having conversations about the value of services, participants will use Keypad Polling to vote and rank services in order of priority.
- Workshops will be open to the general public. Partners and community organizations, groups and associations will be asked to identify the role they wish to play in the process and how they might support the conversation. Two conversations will be held for the general public in different areas throughout the City, and one conversation will be held for City staff. Incorporate opportunities for participants to engage remotely (Twitter, facebook and online discussion forums).

Zing Technologies
- Zing is computer software coupled with interactive controls that enhances public meetings by speeding up group knowledge creation and guided discovery learning. Not only is data quickly collected from participants, but the information gathered can be rapidly analyzed and reintroduced for group reflection boosting their collective thinking.

Community Priorities Mobile App
- Online tool designed to gather innovative ideas, suggestions and priorities related to City infrastructure and services, and allow participants to add items, and compare them according to importance. This item is presented as an optional addition for use in the project. It can be tailored to promote engagement by students as youth as they can take pictures to be used as visual answers to questions, and can be used on a website, as a facebook widget and as a module on the mobile app.

Check-ins with Council and Senior Management Team
• To provide regular updates on progress, what we are hearing, what we are asking from Council and staff and what input, suggestions and recommendations they may have on the approach or to specific issues that may arise.

• Provide Council with information needed to host activities in their wards or to encourage participation in the process.

What Was Said Reports
• To document the words, comments, phrases and input of participants directly and as they were submitted.
• Will also include all complaints, concerns and positive feedback received.

IAP2 Module 1: Planning for Effective Public Participation
• Training delivered to City staff, where they will learn a rigorous step-by-step process and understand the importance of setting clear objectives, delivering on a promise to the public, and how to determine the appropriate level of public participation.

IAP2 Module 2: Communications for Effective Public Participation
• Training delivered to City staff, where they will explore how to clearly communicate complex information, develop key messages and increase abilities to engage participants in emotional and risky issues.

IAP2 Module 3: Techniques for Effective Public Participation
• Training delivered to City staff, where they will learn about and practice a wide range of different techniques and practical tools used by public participation practitioners around the world.

Phase 3 Making Cost-Effective Choices for How We Live, Work, Plan & Learn -Now and in the Future

MAY – JUNE 2012
Layering on the foundation and capacity building steps, Phase 3 delves into the rich and constructive dialogue that generates the meaningful and constructive engagement with stakeholders. Tapping into a variety and diverse group of stakeholders will provide values based input on the pros, cons and trade-offs of a variety of infrastructure and services. Again, transparent and accountable reporting of all engagement activities will continue to strengthen relationships between the City and their stakeholders.
Engagement materials and tools developed that inspire conversation, provide valuable information and inspire creative thinking and that increase understanding about the substantive issues.

- Imagine the Future Scenario Creation Workshops with internal staff and select group of external stakeholders
- Future Scenarios developed and supporting materials created (for use in subsequent workshops)

To engage participants in a conversation designed to weigh the facts and values, pros and cons and to propose options for the future

- Imagine the Future Forums with Community, Staff and Youth
- Imagine the Future Scenarios Online
- ServiceSelector Mobile App
- Taping and posting video planning on Foundation TV

Engage Council and staff and gather input on approach, plan and process

- Check-in with Council
- Check-in with Senior Management Team

Provide analysis and summary of stakeholder input from Phase 3 and present for consideration

- Reporting and analysis of sessions as well as engagement process overall
- Evaluation of process plus measurement of baseline

*Methods & Activity Descriptions:

Imagine the Future Scenario Creation Workshops

- Scenario workshops involve creating provocative and plausible stories about what the future might hold, based on the values and priorities identified in Phase 2, including diverse ways that issues in the environment might evolve and interact. Multiple stories, (usually three or four) are created that capture a range of future possibilities, a variety of impacts, and expected and surprising outcomes from specific scenarios.

- Scenarios are created with the input of key stakeholders, and the scenario creation includes a few workshops to gather people together, discuss drivers, trends, possible changes in context and environment and then create a number of scenarios on the issues.

Imagine the Future Forums (Community and Staff)
Once scenarios are created, stakeholders are then engaged in a workshop that explores the values, impacts and needs of the various scenarios. Workshops will be open to the general public. Partners and community organizations, youth, other groups and associations will be asked to identify the role they wish to play in the process and how they might support the conversation. Two to three conversations will be held for the general public in different areas throughout the City, and one conversation will be held for City staff. Incorporate opportunities for participants to engage remotely (Twitter, facebook and online discussion forums).

Using an Open Space technique combined with tools and processes found in a deliberative forum, participants will identify tradeoffs resulting from the priority ranking of infrastructure and services from Phase 2.

Using a Deliberative Forum process (with the workbooks noted below), participants will reason and talk together to weigh the costs and benefits of several options for action while considering the views of others. Participants will develop recommendations for possible options to move forward. Deliberative Forums are used to address complex public issues that do not have easy answers and they serve to raise understanding as well as mitigate polarization by providing a process where participants have an equal opportunity to be heard.

After having conversations about the value and impact of scenarios, participants will use Keypad Polling to vote and adjust budget allocation for services.

Results will be submitted so that they can be reported and analyzed.

**Imagine the Future Workbooks**

- Workbooks are used to share information about the Future Scenarios on a complex, multi-faceted issue with a wide variety of perspectives and values. Workbooks are made up of 3 essential components. 1) A set of introductory pages and background materials that provide valuable information that is necessary to consider before stakeholders begin to formulate ideas and suggestions. 2) Questions about values, priorities and suggestions relating to Planning for Future Infrastructure and service based on a number of different options or approaches for future direction 3) Pre survey to be completed prior to completing workbook and engaging in discussion and a post survey to complete after discussion, both designed to measure level of understanding and engagement process.

**Imagine the Future Scenarios Online**

- Scenarios generated for the Imagine the Future Forums will be posted along with deliberative questions to consider the value and impacts of the different options.

**ServiceSelector MobileApp**

- Online tool designed to allow participants to identify tradeoffs between options and rank the
options based on their order of preference.

### Mobile Engagement:
We have already had much success with working with smart phone Apps such as the one we developed for the Calgary budget planning consultations. The ServiceSelector Mobile App will be tailored specifically for this project incorporating Hamilton’s logo and engagement program graphics.

For an example of notifications or advertisements, please see Appendix A – Work Samples.

### Foundation TV
- Video planning from citizens, staff and Council in the infrastructure around the City, marginalized and hard to reach populations will also be targeted specifically, with the goal of having participants predict outcomes of various City planning scenarios.
Phase 4 Analysis and Reporting
July - September 2012

The majority of our projects include an aspect of formal report writing, documenting recommendations, input, themes and conclusions from engagement processes. We have enormous experience documenting decisions and recommendations and honouring the input of a wide variety of participants, articulating points of agreement and diversity. As well, many of our public engagement plans include a comprehensive evaluation component combining participant input, satisfaction and analysis along with monitoring and qualitative observations from project team members.

<table>
<thead>
<tr>
<th>Timelines</th>
<th>Intended Outcome &amp; Deliverables</th>
<th>Methods &amp; Activities*</th>
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</thead>
<tbody>
<tr>
<td>July – August 2012</td>
<td>✓ Identify themes, conclusions and recommendations for delivery of services&lt;br&gt;✓ Report on quality of engagement process and input received</td>
<td>• Analysis of input received through all the phases&lt;br&gt;• Analysis of evaluation results through all the phases&lt;br&gt;• Draft final report&lt;br&gt;• Distribute final report for review&lt;br&gt;• Finalize report</td>
</tr>
<tr>
<td>September 2012</td>
<td>✓ Report back to citizens the results and outcomes of engagement activities&lt;br&gt;✓ Provide the City with a comprehensive report on citizen’s expectations of service levels and necessary adjustments needed</td>
<td>• Present final report and summary of findings to Council and the public&lt;br&gt;• Work with Community Engagement Advocate Team to determine success of process, complaints procedure and measure results and outcomes against indicators</td>
</tr>
</tbody>
</table>

*Methods & Activity Descriptions:

Final Report
- Analyzing, coding and reporting participant responses is critical to developing information that can be considered as a basis for recommendations for future work and decision-making. This process requires us to take the quantity of comments and summarize them in a way that makes sense for decision makers. We combine our backgrounds in social science and data analysis with a process called the “Art of Harvesting” where we take participant input and identify areas of convergence, as well as areas of divergence, and summarize these for consideration. We code the data for key words and comments related to each project element, identify specific themes, and summarize the input in a neutral and unbiased manner.
The final report will also describe the methodology, activities and participation rates.

This work will be supported by using the NVivo is a software tool, developed by QSR International (www.qsrinternational.com), that has been used in our past projects to analyze qualitative information (ordinal data) often collected from public participation activities (e.g., in-depth interviews, community meetings). It is primarily used to code and reveal the full depth of issues or interests that are held by stakeholders about a particular topic. Depending on the amount and type of data gathered in this process, NVivo will be considered as appropriate and used to assist in issues analysis.

As an example, we will provide detailed results that will outline:

- Participant priorities related to Infrastructure categories and classes
- Participants values related to City priority in programming and service related to infrastructure categories
- Participant ranking and weighting related to priority timing, investment and outcome as it relates to all infrastructure groups along with the specific values and principles associated with why these choices are made
- Breakdown of ranking, weighting and priorities by demographic characteristics – age, gender, socio-economic status, organizational affiliation, home ownership, gender etc
- Participant preferences for spending priorities based on value and interest, along with related trade-offs – where trends, themes and indicators are emergent such as correlations between choices (i.e. spend more money on housing and less money on roads)
- Participant trade-offs, choices and proposals related to increasing and improving infrastructure and infrastructure classes (i.e. raising letter grades)
- Other themes, values and input that emerges as it relates to City services, infrastructure and operations
- Input on the process and measures of success related to engagement and recommendations for continuing to enhance the City’s engagement process

**Note: we offer these examples of what may be reported from the engagement process as samples only. A critical outcome in Phase 1 will be working with City staff to identify key needs and requirements for reporting, as well as drafting a report outline that will be refined and confirmed in Phases 2 and 3.**

### Reporting Back

- Once decisions are made, and as a final step in implementing good governance, it will be important to report back to participants how their input was used and considered in decision-making.

For an example of a past engagement report we have prepared, please see [Appendix B – Past Project Report From the City of Calgary](#). Please note, this full report is 161 pages in length, the table of contents and introduction are included, followed the link to view the complete report.
Part 4 – Team Responsibilities and Work Plan

The Consultant Team will be comprised of Dialogue Partners staff and Associates. Our network of Associates and staff are skilled and experienced practitioners, who work with similar values, approach and principles. Associates work with the core Dialogue Partners team on a project-by-project basis where they are brought in based on project needs, individual expertise or geographic location.

To support this work in Hamilton we have supplemented our staff with those who live and work extensively around the Hamilton area to ensure that we not only have people who are experts in their fields but also engaged with the local scene.

Organizational Chart
<table>
<thead>
<tr>
<th><strong>Project Team Members</strong></th>
<th><strong>Roles &amp; Responsibilities</strong></th>
</tr>
</thead>
</table>
| **Stephani Roy McCallum**  
*Managing Director* | Project Director/ Facilitation Lead  
- Overall client management, liaison and quality assurance  
- Oversee all project management  
- Lead facilitator guiding, designing and facilitating project facilitations/partnering sessions  
- Responsible for project charters and process design  
- Specific advice and guidance on any controversial, emotionally charged or conflictual situations or engagement activities  
- Trainer for the IAP2 Public Participation for Decision Makers workshop and the IAP2 Certificate in Public Participation  
- Review of reports |
| **Tannis Topolinsky**  
*Senior Consultant & Project Manager* | Project Manager/ Youth Engagement Lead/ Reporting Lead  
- Overall project management  
- Lead development of youth engagement strategy and oversee activities  
- Lead development of analysis, evaluation and reporting strategies and oversee activities  
- Support planning, preparation and implementation of facilitation/partnering sessions  
- Responsible for project charters and process design  
- Trainer for the IAP2 Public Participation for Decision Makers workshop and the IAP2 Certificate in Public Participation |
| **Brian Menzies**  
*Senior Consultant* | Communications Lead  
- Lead development of communications strategy and oversee activities; including communications with internal stakeholders  
- Development of communications materials  
- Support planning, preparation and implementation of facilitation/partnering sessions  
- Support online tools, engagement and communications activities  
- Support analysis, evaluation and reporting activities |
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<tr>
<th>Name</th>
<th>Role</th>
<th>Responsibilities</th>
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<tr>
<td>Tamara McCarron</td>
<td>Senior Consultant</td>
<td>Lead Outreach and Partnership</td>
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<td>• Lead development of outreach and partnership strategies and oversee activities</td>
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<td>• Support communications activities</td>
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<td>lan McCallum</td>
<td>Senior Consultant</td>
<td>Lead Online Tools, Engagement and Communications</td>
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<td>• Lead development of online tools, engagement and communications strategy and oversee activities</td>
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<td>• Support outreach and partnership activities</td>
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<tr>
<td>Howard Williamson</td>
<td>Dialogue Partners Associate</td>
<td>Communication and Facilitation Support</td>
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<td>• Support communications activities</td>
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<td>• Support planning, preparation and implementation of facilitation/partnering sessions</td>
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<tr>
<td>Brad Wong</td>
<td>Dialogue Partners Associate</td>
<td>Outreach and Facilitation Support</td>
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<td>• Support outreach and partnership activities and work with local organizations</td>
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<td>• Support planning, preparation and implementation of facilitation/partnering sessions</td>
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<tr>
<td>Charlotte Young</td>
<td>Dialogue Partners Associate</td>
<td>Outreach and Partnership and Facilitation Support</td>
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<td>• Support planning, preparation and implementation of facilitation/partnering sessions</td>
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<td>• Graphic facilitation services</td>
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<tr>
<td>Hillary Best</td>
<td>Dialogue Partners Associate</td>
<td>Youth, Facilitation and Reporting Support</td>
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<td>• Support youth engagement activities</td>
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<td>• Recording and reporting from engagement activities</td>
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</table>
Emily Gallant  
**Dialogue Partners**  
**Associate**  
Youth, Facilitation and Reporting Support  
- Support youth engagement activities  
- Support planning, preparation and implementation of facilitation/partnering sessions  
- Support analysis, evaluation and reporting activities  
- Recording and reporting from engagement activities

**Project Management and Quality Control**

We can confirm that our team can achieve the project deliverables as outlined, within the required timelines in the Request for Proposal. The expertise of our team means that each team member is highly qualified for each assigned lead and support role. In addition, for all of our project teams we have multiple team members for support and back up. While it is the project manager’s role to ensure coordination of all aspects of the project, we have integrated our team members through the project management structure of the project in such a way to ensure that they can bring the knowledge of approaches and activities from all areas to further ensure coordination of initiatives and activities.

We will develop an evaluation strategy at the very beginning as outlined in the deliverables, which allows us to track progress throughout, at all the key milestones. This allows us to track whether we are achieving what is most important to us as we go along, and we will modify our existing approach or incorporate new strategies to ensure success.

Our Project Director will review design, deliverables and materials to ensure quality, consistency and best practices. We will work directly with the City of Hamilton internal team to ensure deliverables, direction and success of all aspects of the project. In the final engagement and communications plans we will identify specific risks to the project, along with comprehensive mitigation strategies to address them, should they emerge. Regular milestones and careful tracking will ensure we catch any challenges before they become a problem.

**WORK PLAN**

As requested in the RFP, this section will provide an overview of Dialogue Partners team members and their corresponding roles and responsibilities. The work plan outlines the activities and methods as proposed in Section 3 and assigns task leaders/supporters and estimates the required numbers of hours of time for each team member.
<table>
<thead>
<tr>
<th>Step</th>
<th>Proposal Activities</th>
<th>Leading &amp; Supporting</th>
<th>Estimated Time (hours)</th>
</tr>
</thead>
</table>
| 1: Planning the Process | Research and Review | Lead: B Menzies  
Support: T McCarron | 16  
8 |
| March 2012 | Stakeholder Identification | Lead: T McCarron  
Support: B Wong  
Jr Support: E Gallant | 8  
8  
8 |
| | One-on-one Interviews | Lead: T McCarron  
Support: H Williamson  
Support: B Wong  
Jr Support: H Best  
Jr Support: E Gallant | 20  
10  
10  
9  
9 |
| | Issues Assessment | Lead: T Topolnisky  
Support: T McCarron | 16  
4 |
| | Engagement, Evaluation and Communications Plans | Lead: S Roy McCallum  
Support: T Topolnisky  
Support: B Menzies | 8  
12  
12 |
| | Develop and build project infrastructure (website, social media, mobile apps, Phase 2 engagement tools) | Lead: I McCallum  
Support: B Menzies  
Support: T McCarron | 16  
16  
16 |
| | Stakeholder Database | Lead: I McCallum | 8 |
| | Project Direction, Project Management and Administration | Lead: S Roy McCallum  
Support: T Topolnisky | 16  
8 |
| | Phase 2 Process Design | Lead: S Roy McCallum  
Support: T Topolnisky | 14  
14 |
| | Phase 2 Material Development | Lead: B Menzies  
Support: T McCarron  
Support: T Topolnisky | 12  
12  
12 |
| | Public Participation for Decision Makers Workshop | Lead: S. Roy McCallum  
Support: T Topolnisky | 10 hours of training |
## 2: Building From a Solid Foundation

### April - May, 2012

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<thead>
<tr>
<th>Activity</th>
<th>Lead</th>
<th>Support 1</th>
<th>Support 2</th>
<th>Support 3</th>
<th>Junior Support</th>
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<tbody>
<tr>
<td>Website, Social Media, Communications</td>
<td>S Roy McCallum</td>
<td>I McCallum</td>
<td>B Menzies</td>
<td>T McCarron</td>
<td>E Gallant</td>
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<td>Foundation TV</td>
<td>S Roy McCallum</td>
<td>I McCallum</td>
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<td>Photovoice</td>
<td>S Roy McCallum</td>
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<tr>
<td>CityScape Workshops (Community and Staff)</td>
<td>S Roy McCallum</td>
<td>B Menzies</td>
<td>T Topolnisky</td>
<td>T McCarron</td>
<td>H Williamson</td>
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<td>Community Priorities</td>
<td>S Roy McCallum</td>
<td>I McCallum</td>
<td>B Menzies</td>
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<td>Social Media Conversations</td>
<td>I. McCallum</td>
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<td>Project Direction, Project Management, Client Liaison and Administration</td>
<td>S. Roy McCallum</td>
<td>T Topolnisky</td>
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<td>Community Outreach and Partnership</td>
<td>T McCarron</td>
<td>B Wong</td>
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<td>Phase 2 Reporting</td>
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<td><strong>Lead:</strong> S Roy McCallum</td>
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<td><strong>Support:</strong> T Topolnisky</td>
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<td><strong>Jr Support:</strong> H Best</td>
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<th>Phase 3 Process Design</th>
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<tr>
<td><strong>Lead:</strong> S Roy McCallum</td>
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<td><strong>Support:</strong> T Topolnisky</td>
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<th>Phase 3 Material Development</th>
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<tr>
<td><strong>Lead:</strong> Brian Menzies</td>
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<tr>
<td><strong>Support:</strong> T McCarron</td>
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<td><strong>Support:</strong> T Topolnisky</td>
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<tr>
<th>IAP2, Certificate in Public Participation Training</th>
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<tr>
<td><strong>Lead:</strong> S. Roy McCallum</td>
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<td><strong>Support:</strong> T Topolnisky</td>
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<th>3: Making the Cost-Effective Choices for How We Live, Work, Play &amp; Learn – Now and in the Future</th>
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<td><strong>Website, Social Media and Communications</strong></td>
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<td><strong>Lead:</strong> I McCallum</td>
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<td><strong>Support:</strong> B Menzies</td>
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<td><strong>Support:</strong> T McCarron</td>
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<th>Imagine the Future Scenario Creation Workshop</th>
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<td><strong>Lead:</strong> S Roy McCallum</td>
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<td><strong>Support:</strong> B Menzies</td>
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<th>Imagine the Future Forum</th>
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<td><strong>Lead:</strong> S Roy McCallum</td>
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<td><strong>Support:</strong> B Menzies</td>
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<th>ServiceSelector Mobile App</th>
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<tr>
<td><strong>Lead:</strong> I McCallum</td>
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<td><strong>Support:</strong> B Menzies</td>
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Part 5 – Our Team

The Dialogue Partners team for this project brings together some of the most experienced, highly skilled public engagement practitioners in Canada. Our team has played high profile roles in the International Association of Public Participation (IAP2), have worked extensively on large scale, complex and controversial projects as well as smaller scale but equally important community conversations and dialogues.

We have extensive experience developing consultation and engagement processes that employ best practices in community engagement. The toolkits and supplementary documents we create are designed to support clients to implement collaborative processes that engage community members and staff in discussions that identify and build on common ground, gather diverse perspectives and generate ideas, suggestions and solutions that will inform and assist decision-makers.

Our team has played high profile roles in the International Association of Public Participation (IAP2), have worked extensively on large scale, complex and controversial projects as well as smaller scale but equally important community conversations and dialogues.
The wisdom we have gained from our numerous projects and diverse experiences will provide the City of Hamilton with a team that can:

- provide exceptional quality when delivering engagement projects on complex issues;
- leverage existing and build new community and stakeholder relationships;
- bring knowledge and understanding of grassroots, community-based and NGO groups as well as best practices when engaging with these communities;
- create tools, structures and environments to prepare stakeholders and communities for positive engagement on complex and controversial issues;
- manage and redirect emotion and outrage into opportunities and passion;
- report out input in a way that is useful and meaningful and results in informed decisions;
- build understanding and support of elected officials for a different approach for meaningful engagement; and
- support the City in building internal staff capacity, skills and experience in citizen engagement.

The Dialogue Partners team has extensive experience working on complex issues with the potential for high emotion and conflict based issues with a wide diversity of stakeholders. Issues such as:

- Large scale, high stakes values based engagement on municipal budgets, City services and programs;
- Long term strategies for nuclear waste storage;
- A review of 70 inner city schools resulting school closures and program changes;
- Impact of colonialism on Inuit people and identification of recommendations for healing and reconciliation;
- Discussion with directly affected stakeholders on controversial policies like time deferral for blood donation by men who have sex with men;
- Community conflict in recovery to natural disasters in situations of massive bush fire and flood (Australia);
- Setting of annual budgets and priorities with a wide diversity of NGO’s for the Canadian Commission for UNESCO;
- Tensions between individual property rights and community interests in heritage designation; and
- Water as a human right at the World Water Forum in Istanbul, Turkey.

These are a few of many issues we have dealt with where the stakes and the emotions are high, where there are histories of distrust, cynicism and strained relationships – and where our work resulted in implementable decisions and sustainable change for the future.
OUR SERVICES

Public Engagement and Stakeholder Relations

- Developing and implementing meaningful and effective programs, with focus on issues of passion, complexity or controversy where diversity, inclusion and informed decisions results.

Facilitation

- Employing innovative best practices in facilitation, transformation and group dynamics, with expertise in building consensus and common ground.

Coaching, Knowledge Building & Strategic Advice

- Providing coaching and expert advice in engagement and involvement to build capacity and creating toolkits, policies and guidelines to support organizations in their work.

Training

- Building capacity in organizations and with members of the public, instilling best practices in the field of public involvement.

Dialogue Partners four service areas align directly with the goals of this project for the City of Hamilton.

We are not a management consulting firm who dabbles in public engagement, or an engineering or environmental firm with public engagement staff who support their “real” work. Instead we are a group of highly experienced, dedicated professionals focused exactly on what the City of Hamilton is trying to achieve.

This work is not just what we do, but who we are, and we look forward to the possibility of working with the City of Hamilton on this long-term important project.

Throughout our proposal we have listed some of our extensive experience as we speak to the goals, approach and deliverables outlined in the Request for Proposal. We’ve provided more information in our resumes later in the proposal, as well as a sampling of project experience that relates to your project.
OUR TEAM

Some highlights of note about our team:

- Our knowledge and expertise in designing and developing consultation and engagement policies, processes and toolkits comes from a variety of similar past projects with clients such as; the cities of Calgary, Burlington, Edmonton, Ottawa, and Hamilton; Federal Agencies such as Health Canada, Natural Resources Canada, the Canadian Food Inspection Agency; and private companies and organizations such as Manitoba Hydro, Canadian Blood Services and the Canadian Fertilizer Institute among numerous others.

- We have extensive experience working with local and municipal governments, elected officials, Councils and Administration where we supported efforts to incorporate engagement and consultation processes into the development of community strategies, plans and decision-making.

- We believe in supporting relationships and the capacity of everyone involved in our projects and processes, both stakeholders and clients, and focus on both formal and informal learning, development and networks which will extend beyond the time of our involvement.

- We have extensive expertise in the evaluating and monitoring of engagement and consultation projects, and we believe you are only as good as your last community interaction and the best evaluation is determined by those who participated – not by us.

- During our planning phases we have partnered with clients to develop innovative, engaging and creative techniques that encourage and enhance participation from diverse audiences to get the greatest breadth and depth of perspectives as possible.

- We have worked with diverse social, cultural and economic groups on values based issues, creating the space for them to feel comfortable participating and expressing their ideas.

- All team members are highly experienced practitioners and facilitators with backgrounds in capacity building, public engagement and as Certified Professional Facilitators.

- We have an enormous amount of experience facilitating both large and small scale meetings with hundreds of participants, and management of these project.

- Our entire team has a deep and demonstrated commitment to best practices in the field, and a relationship with the International Association for Public Participation (IAP2)

THOSE WHO ARE NEAR TO THE HAMILTON REGION

These are our team members who have worked in the area and have a wealth of networks. Specifically the experience they bring that will benefit this project is their extensive work with not-for-profit groups, community organizations, other local municipal governments, youth engagement and in establishing partnering sessions for large projects such as this.
THOSE WHO ARE A LITTLE FARTHER AWAY

To ensure we have all the expertise and support we need to contribute to the success of this project, we have other team members who will also play significant roles in this project and are easily accessible. They will provide insight and best practices from their experiences working with other municipalities and communities across Canada.

Stephani Roy McCallum
Ian McCallum
Charlotte Young
Bradley Wong
Howard Williamson
Emily Gallant
Hilary Best

Tannis Toplnisky
Kim Kolenc
Brian Menzies
Tamara McCarron
Stephani Roy McCallum is the Managing Director of Dialogue Partners Inc. and is based in Ottawa. She has managed more than 150 successful public engagement projects and has facilitated over 300 events and meetings in 18 years in the field. She has led and managed projects involving more than 30,000 participants and has worked on complex projects ranging from municipal budgets, land use, health care, transportation, nuclear waste, education and environmental issues. She has worked across Canada at the national, provincial and local level, and in the U.S.A., Australia and Europe.

Stephani specializes in deliberative process on controversial and complex issues. She has a worked extensively with local governments to enhance and improve their decision-making processes, governance structures and operations and to support and implement initiatives related to community engagement. For example, this has included workshops and discussions with elected officials in the cities of Calgary, Edmonton and Ottawa, among others. Her work has involved the creation of public engagement policies and toolkits for multiple governmental organizations at all levels, such as the development of the Public Consultation Policy for the City of Ottawa. This work was awarded a Special Recognition Core Values Award from the International Association of Public Participation. She has designed, facilitated and reported on a large number of high stakes projects, working with passionate, committed and sometimes adversarial participants to gather input for effective decision making.

Additionally, Stephani is a Certified Professional Facilitator with the International Association of Facilitators (IAF) and was the 2008 President of the International Association for Public Participation (IAP2). She is a licensed trainer for IAP2 of the Certificate in Public Participation, an Assessor of new candidate trainers for IAP2, and lead developer and trainer of IAP2’s Emotion, Outrage & Public Participation program. In addition, Stephani regularly teaches, speaks and writes on advanced issues and innovations in the engagement field.

Stephani, will be the main contact for this project:

Email: stephani@dialoguepartners.ca
Telephone: 613-724-2450 ext 103
Twitter: RedheadSteph
Skype: Stephani.roy.mccallum

Tannis Topolinsky is a Senior Consultant at Dialogue Partners based in Edmonton and has ten years of public engagement experience. This has involved legislation, policy and program development in the areas of food safety, health products and drugs, as well as the management of contaminated sites from a human health perspective. She has diverse experience engaging
communities, consumer interest groups, non-government organizations, professional and industry associations, academics and patient groups.

She has assessed, analyzed and evaluated many public involvement strategies and approaches, and provided expert advice to senior managers on most effective means of involving those affected. She has diverse planning and facilitation experience dealing with projects where there is potential risk to human health and impacts on individuals’ quality of life.

Tannis has extensive experience providing facilitation and capacity building services to both government and non-government organizations across the country. She has recently completed the International Association of Public Participation’s licensed trainer assessment process to become a licensed trainer for the Certificate Program in Public Participation.

Kim Kolenc is a Senior Consultant with Dialogue Partners based in Edmonton and has significant experience working in both the upstream and downstream operations of the oil and gas industry with a focus on the practice of Stakeholder Engagement and Aboriginal Consultation. Experienced in both large-scale projects such as federally regulated pipelines and comprehensive municipal budget discussions she has also worked on smaller-scale projects such as an elementary school courtyard revitalization and land acquisition for natural gas pipeline and drilling projects. Prior to joining Dialogue Partners, Kim was employed with Petro-Canada Oil Sands based in the Alberta’s Heartland Region. This role required significant interactions with a number of the municipalities within Sturgeon County. She was also responsible to engage with non-governmental organizations, Aboriginal communities, landowners and residents of the area.

These experiences and projects have provided Kim with an opportunity to successfully work with a wide variety of stakeholders and understand the diversity in needs of municipal governments, environmental organizations, industry groups, rural landowners, advocacy groups and Aboriginal and Metis communities. Kim has completed a Certificate in Public Participation from the International Association of Public Participation (IAP2) and is currently undertaking courses in collaborative conflict resolution and principled negotiation and mediation from the Justice Institute of BC. Kim serves on the IAP2 Wild Rose (Alberta) Board of Directors.

Please Note: Kim has worked with us on previous aspects of the project with the City of Hamilton, however, will be on maternity leave for the majority of the project and has not been included in the assignment of detailed work at this point.

Brian Menzies is a Senior Consultant with Dialogue Partners Inc. based in Victoria and he has over 10 years of experience managing public engagement projects for governments and corporations. He has extensive experience managing stakeholder relations and public policy consultations, including an international trade dispute, First Nations negotiations, budget consultations, natural resource industry restructuring, and health care issues.
Prior to joining the company, Brian was the Chief of Staff for the BC Minister of Health managing challenging public policy issues and cultivating stakeholder relations. Before this, he worked as a public affairs consultant with government, industry, and interest groups. Brian helped his clients employ a variety of consultation techniques that engaged their stakeholders in joint problem solving that created innovative solutions to complex public challenges.

Brian specializes in helping to manage controversial public issues through the application of public engagement processes. Brian has a Masters of Arts in Conflict Analysis and Management from Royal Roads University. He has completed all certification courses from the International Association of Public Participation, a diploma in public relations from the University of Victoria, and has studied mediation and other applications of conflict resolution from the Justice Institute of British Columbia.

**Tamara McCarron** is a Senior Consultant with Dialogue Partners Inc. based in Calgary. Prior to joining the company, she held progressively senior positions with not-for-profit, post secondary, and private sector organizations. In these positions, she cultivated relationships and formed strategic partnerships with a number of organizations to provide exemplar service and stakeholder satisfaction. As a result, Tamara has demonstrated her ability to positively impact the overall bottom line. With a passion for technology and communication, Tamara lead an organization through a branding project which consisted of provincial engagement sessions of key stakeholders to the development of a multi-portal website.

She is experienced in bringing diverse small to medium sized groups together to vision, craft, and commit to exploring possible solutions to complex challenges. A dynamic presenter, Tamara enjoys working with groups and has been a guest presenter for many University and Community groups.

An active volunteer, Tamara serves on a number of not-for-profit boards. For her commitment to the community and her success in business, Tamara was named as one of Calgary’s Top 40 Under 40.

**Ian McCallum** is a Managing Associate with Dialogue Partners based in Ottawa who has over 15 years in public policy and stakeholder and government relations, both in a large urban municipality and at the federal government. Ian is a graduate of Carleton University with a Master of Arts in Public Administration, and Bachelor of Arts from the University of Guelph in Canadian History and Rural Extension Studies. Ian has extensive training in working with and in municipal government structures, strategic environmental assessment, facilitating public policy and is a Certified Public Participation Practitioner from the International Association of Public Participation.

Ian has worked in various levels of the legislative and political process – federally, provincially and municipally, both within a grassroots community environment as well as within highly organized organizations. From the fall of 1997 to the spring of 2004, Ian worked with the Regional Chair of
Ottawa-Carleton, who then became Mayor of Ottawa, Canada’s fourth largest municipality. Ian served as the Community Outreach Officer, where diverse issues from social services to recreation, land use, housing and transportation were his main focus. Consistent in all these issues were the research and information gathering requirements, issue analysis and collaborative grassroots approach required for dealing with the many varied voices and opinions in both community halls and halls of decision making.

As an expert in stakeholder relations and community outreach, Ian was key to managing and enhancing relationships with diverse people. He has worked closely with many organizations, associations and unions with concerns on municipal issues to build broader coalitions. Ian serves on the Board of Directors of IAP2 Canada, and was a member of the Founding Board of Directors.

Charlotte Young, Ph.D., is an associate with Dialogue Partners Inc. based in Toronto. She has over twenty-five years of experience in collaboration. She provides facilitation, mediation and consensus building processes to help develop, evaluate, and support public policy; and to create optimally functioning organizations. She designs and leads events involving diverse expertise and multiple jurisdictions that promote common understanding; encourage creative thinking; and enable groups to achieve broadly-supported, enduring solutions. Charlotte holds a Ph.D. from the University of Michigan. She is a certified mediator, and facilitator for True Colours personality strengths inventory and graphic recording. Charlotte is based in Toronto.

Bradley Wong is an associate with Dialogue Partners Inc. based in Toronto has a Master of Arts in Environmental Leadership has established a solid project management and leadership reputation for getting things done. With over two decades of professional and service experience in the Not for Profit environment, including staff leadership and human resources, business management, systems development, facilities management, and diversity training, Brad has consistently met or exceeded performance, outcomes and goal expectations. Brad Specialties include system thinking, training and group process facilitation, appreciative inquiry, project management, diversity and social inclusion.

Howard Williamson is an associate with Dialogue Partners Inc. based in Ottawa and has over 25 years of communications and community engagement experience in Canada. Howard’s recent work has focused on multi-disciplinary teams assembled for the purpose of obtaining public input into the design of environmental engineering projects and community planning processes. He is widely recognized for his success in coordinating public consultation processes and managing the communications surrounding public projects.

In addition to a certificate in public participation from the International Association for Public Participation (IAP2), Howard has completed numerous community engagement courses with the Environmental Protection Agency in the United States. He recently completed a certificate course on emotion, outrage and public participation with the IAP2.
Emily Gallant is a Dialogue Partners Associate based in Ottawa. She is a recent graduate of Dalhousie University where she studied English Literature. She has a comprehensive knowledge of writing and editing and development of plain language, accessible stakeholder materials for use in public consultation. Emily holds a Certificate in Public Participation from IAP2 and has taken Dialogue Partners Group Facilitation Skills for Public Engagement, Analyze This and Standing in the Fire training programs. She has facilitated small group conversations with diverse stakeholders, including the Calgary budget engagement process, Qikqtani Truth Commission, Health Canada and Edmonton Public School District. She has facilitated multiple small groups sessions, led youth engagement aspects of some of our projects and written detailed reports on public involvement proceedings. Emily is based in Ottawa.

Hilary Best is an associate with Dialogue Partners Inc. based in Toronto. She has served as project coordinator on a team retained by the City of Hamilton to facilitate the Rapid Transit Citizens’ Advisory Committee. The mandate of the committee was to engage representatives of Hamilton communities in the planning of the City’s Rapid Transit projects. Through monthly meetings with the Committee, the team provided citizens with knowledge about project development, answered questions, diffused tension and misunderstanding and provided an entry point for citizens to engage with the decision making process. Committee members were then empowered to serve as project ambassadors in their own communities. Minutes from each meeting were synthesized into a key issues analysis table to inform Rapid Transit Team staff of citizen sentiment. This project was characterized by high emotion and a great deal of media interest. We worked to address these issues and build a shared vision of the role of rapid transit for Hamilton’s future.

*See Appendix C for Team Resumes*

Part 6 – Our Experience

As noted in the previous section, our team brings a wide range of experience in engagement and consultation plan process and tools development, municipal issues, and providing training and capacity building for internal and external stakeholders. The Dialogue Partners team has worked on engagement and consultation projects with numerous municipalities across Canada and this has included designing and implementing public engagement strategies, developing and reviewing best practices, and gathering data, input and feedback for legislation, policy and program planning. Each project has a unique population and community ranging from large urban cities, regional districts to smaller rural communities and towns. Each municipality faces its own unique challenges and opportunities so that each time we tailor the project tools, methods and techniques to deliver the required outcomes that are best suited to the needs of the participants.
and the client. In this section, we provide a limited number of project examples that are relevant to the requirements outlined in the Request for Proposal and specific to the needs Hamilton.

Specific Examples:

City of Calgary, Our City. Our Budget. Our Future.

Dates: December 2011 – July 2012

Value of Project: Approximately $550,000 consulting fees plus expenses (venues, catering, equipment, online tools, mobile app, travel, supplies etc)

Client Contact:
Whitney Smithers
Manager, Business Plan & Budget Coordination
Chief Financial Officer’s Department
The City of Calgary #8003
Tel: 403.268.4996 or Email: Whitney.Smithers@calgary.ca

Dialogue Partners worked with The City of Calgary to develop a first of its kind comprehensive conversation in Canada to engage citizens, City employees, community organizations and stakeholders about the City budget. The project focused on understanding what Calgarians imagine for their city and the alignment of City services and Administration to support that vision. It was a holistic approach to engaging people in a conversational journey about City services, raising understanding and gathering input on the development of 3-year business plans, budget and priorities for 2012-2014, providing linkages with Council’s longer-term strategic plans (sustainability direction), and understanding values, priorities and trade-offs.

The project included multiple face-to-face events, training and a phased approach in order to build capacity so participants could host their own conversations on the issue and have increasingly more complex discussions. Over the course of three and a half months, we engaged over 23,000 participants. We used over 22 different communication tools to share information and encourage participation in the project, and held 252 different engagement events, opportunities or activities to gather input, ideas, concerns and suggestions which included social media, websites, email, newsletters and community forums.

Community engagement is rarely a single activity but rather a conversational journey with citizens. To increase the capacity of both staff and citizens we held workshops to provide training and expertise for people to host their own conversations. The training and skills could be applied to numerous future activities and projects.
This project included an extensive evaluation component. Some of the results of participant feedback that was provided included:

- 86% felt information was clearly presented and easy to understand
- 84% had a better understanding of the issues
- 76% were clear about the purpose of involvement and their role
- 90% felt they had a good opportunity for dialogue and sharing of ideas
- 90% agreed the facilitators encouraged participation

Relevance to Hamilton:
The City of Calgary project demonstrates Dialogue Partners’ ability to deliver on a very large scale, to a very wide and diverse group of stakeholders and citizens, in a short period of time. Like Hamilton, the City of Calgary needed to engage their citizens to provide long term planning guidance. Calgary was able to extract from their public enough direction to immediately identify an indicative tax rate, and then use the detailed input to build and develop departmental business plans and budgets, and ultimately approve a three-year budget plan. At the point of final approval, approximately 20 citizens turned up to speak about the final decision, with few concerns.

Despite the size of the project, Dialogue Partners was able to achieve the objectives of engagement process on time and on budget. This was possible due to the emphasis we placed on developing a strong foundation, being clear about the project objectives and undertaking the correct research to produce an effective engagement plan. The success of the project also demonstrates our ability to work with the client on such short timelines, under intensive pressure to achieve an objective. We managed to also coordinate planning and approvals with a number of “clients” including the Mayor, City council, senior staff, and the project task force. Working with external audiences, we managed to create a number of techniques that engaged groups that could have been marginalized, such as youth, impoverished individuals, and new Canadians.

In total, 252 different engagement events, opportunities or activities were held during the 3.5 months to gather input, ideas, concerns and suggestions, with over 24,000 participants. The variety of methods and innovative approaches included workshops, online surveys, workbooks, “host your own conversation” trainings, online discussion guides, community and employee conversation cafes and hosted conversations, Allourideas online tool, Budget TV (youtube), blogs, Twitter, Facebook and the Budget Maker mobile app.

In addition, we had a comprehensive communication strategy to enhance awareness of opportunities to be involved and to share information. This included over 22 different communication tools that reached approximately 215,000 direct contact points. Examples include Twitter, Facebook, blogs, mobile apps, Facebook social ads, online advertising banners, newspaper and radio advertisements, transit banners, electronic newsletters, project website, videos and bold street signs.
In support of our workshops and online conversations, Budget Kit Booklets were developed to provide information on City budget, business units and City services. Taking almost 1000 pages of City services and descriptions into 20 pages of information to support informed discussion.

Partnerships with community organizations and community leagues were established with great success. Our project team prepared and provided materials to these organizations to distribute to their networks, contacts and members. We also identified “co-hosts” or “sponsors” for our events in an attempt to reach more participants and encourage attendance. We targeted organizations whose membership included a diverse group of people and were focused on community building at large rather than on specific issues or sectors. A number of organizations distributed information on our behalf. Examples of organizations who co-hosted included: United Way, Civic Camp, Thrive, Immigrant Council of Calgary & Ethno-Cultural Council of Calgary, Federation of Calgary Communities, Calgary Chamber of Commerce and Calgary Urban Aboriginal Initiative. Through these partnerships and by offering support for organizations and individuals to “host their own”, there were 58 conversations held by others which resulted in submissions from 4,445 participants.

A copy of our final presentation to City Council in June 2011, summarizing the results of the process is attached as Appendix D. In January 2012, City staff completed a final evaluation of the project itself, indicating it as useful, comprehensive and successful in achieving objectives. This report is attached as Appendix D.

What you can find in Appendix D from this project:
- Case Study
- Conversation Budget Template, Instructions and Service Bills
- Final presentation to City Council with speaking notes

City of Edmonton, Edmonton City Centre Airport Lands Public Involvement Project

Dates: December 2009 – June 2010

Value of Project: Approximately $300,000 in consulting fees

Client Contact:
Angela Turner, Program Manager Responsible Hospitality Edmonton
Formerly Manager Office of Public Involvement
700 Tower One, Scotia Place, 10060 Jasper Avenue, Edmonton AB T5J 3R8
The Dialogue Partners team planned, designed and implemented a comprehensive public involvement project for the City of Edmonton. The project included development and implementation of inclusive public involvement and communications plans for the Edmonton City Centre Airport lands; to explore the possibilities and challenges of land use. We engaged a wide cross section of the community in a values-based conversation on a highly emotional, controversial issue, in order to identify options for the future. By the end of the project, more than 6,500 participants were involved. Our client at the City of Edmonton rated our services as “exceeding expectations” in all categories of the contract, including deliverables, project management and value for money, noting that Dialogue Partners handled high emotion and conflict in a professional, engaging way.

**Relevance to Hamilton:**
The City of Edmonton demonstrates what Dialogue Partners does best, work on difficult emotional projects. Many organizations fear public engagement, worried that the process could be highjacked by controversy. For Dialogue Partners, we believe that a well-planned process can actually channel this emotion towards a productive outcome as in the case of the Edmonton Airport land use discussion. At the end of this project the City of Edmonton was able to make some constructive decisions on the future of the Airport with wide support from the community that was originally very divided.

The project included: a detailed conflict assessment with more than 125 stakeholder interviews; a one-day Community Conversation with 150 participants; a 25 member Citizen Advisory Group that met monthly and provided input on the public involvement process; an online engagement process including Discussion Forums; community capacity building workshops to train citizens to host / facilitate their own conversations; a photo voice project to engage residents in visually reflecting their thoughts on the possibilities and challenges of existing and future land use; a one-day deliberative forum to refine and develop options for presentation to City Council; and three open houses with embedded key pad polling, to gather final comment on options going forward to Council. By the end of the project, more than 6,500 participants were involved.

High emotion and a long history of polarized views, complex issues and highly organized, well-funded stakeholders were evident. Dialogue Partners used a step-by-step methodology, capacity building with staff and decision makers and stakeholders, and a values-based process to address these issues in the engagement process.

**Highlighted project techniques:**
- 125 stakeholder interviews completed to inform a conflict assessment
- Community Conversations
- 25 Member Citizen Advisory Group
- Training and capacity building for participants to host and lead their own conversations
- Deliberative forums to refine and develop options for presentation to City Council
We used techniques to engage people in different ways than our traditional, formal processes. We used Photovoice to allow people to capture images of what was important to them. This worked well to engage aboriginal elders in working along with youth, and for new immigrant community members as well as it does not rely on a specific language. In this project we also worked with community associations and community organizations, with a specific focus on those providing services and support to those living in poverty, new immigrants, refugees and those receiving social supports. This was key to reach these marginalized voices which were very prevalent in the surrounding area.

Following up on this work we subsequently worked with the City to support them in designing a meaningful process to gather input from citizens on the variety of proposals for a master design plan for the Edmonton City Centre Airport lands. Prior to beginning engagement we presented the plan to City Council to gain support and buy-in for the process and educate them about the important role as observers that they would play in the process.

Our client at the City of Edmonton rated our services as “exceeding expectations in all categories of the contract, including deliverables, project management, and value for money, noting that Dialogue partners handled high emotion and conflict in a professional, engaging way.

What you can find in Appendix D from this project:
- Case Study
- Deliberative Forum materials
- Photovoice booklet

Edmonton Public School Board, Sector Planning Review

Dates: September 2009 – January 2011

Value of Project: $550,000

Client Contact:
Dr. Lorne Parker, Managing Director, Edmonton Public Schools
Centre for Education, One Kingsway Avenue, Edmonton AB T5H 4G9
Tel: 780.429.8000 or Email: lorne.parker@epsb.ca
Dialogue Partners was retained by Edmonton Public Schools to engage the community and stakeholders in a comprehensive engagement process to address the challenges of low enrolment, low class size, student based funding, and surplus school space in certain geographic areas. The goal was to engage the community in a values-based dialogue that weighed community priorities with financial and infrastructure realities and identify a path for the future. We worked with the public, stakeholders and staff in a multi-phased, values-based approach. For every event, we produced a “What was Said” report, and in most cases, an evaluation report. Input gathered has resulted in useful information for decision-making.

High emotion, conflict and polarized viewpoints with stakeholder’s desire to “save my school” were evident. We used a proven step-by-step methodology to address these issues. In addition, a history of broken relationships and polarized conflict among stakeholders around school closure issues meant that expertise in methodology and experience in facilitation was critical to creating a process where participants could propose options for a path forward.

**Relevance to Hamilton:**
Like the City of Hamilton, Edmonton Public Schools asked their public to make difficult choices, to understand their own values. We worked with the public, stakeholders and staff in a multi-phased values-based approach. Part 1 of the project focused on two City Centre areas with 11 schools under review, while Part 2 of the project took place in 3 larger sectors with 70 schools under review. For both parts of the project, we conducted a detailed conflict assessment and used the input to develop the public engagement plans.

In Part 1, Dialogue Partners conducted outreach to over 6000+ participants using 16 distinct communication tools, hosted 21 different engagement activities or events, and gathered input from 600+ participants using workshops, deliberative workbooks, open space process and online consultation. For every event, we produced a “What was Said” report, and in most cases, an evaluation report. Input gathered has resulted in useful information for decision-making.

In Part 2, Dialogue Partners conducted Open Space Forums, deliberative workbooks, online discussion, YOUTH Talk sessions in schools and workshops. Part 2 concludes in late 2010, and we’ll update this case study on the results of that part of the project then.

We used a step-by-step methodology, capacity building with the organization and stakeholders, and a values-based process to address these issues in the engagement process. A lack of trust and a need to demonstrate commitments and transparency were fundamental to meaningful
outcomes. Supporting participant understanding of the complexity and challenges of the issues and viewpoints was important to developing options that were sustainable. We had to work hard to help all participants, including elected officials, understand that “don’t close schools” is a simple solution that wouldn’t address the complexity of values or challenges present in the discussion.

The potential for school closure was an emotional and potentially confrontational issue. There were numerous concerns varying from impacts to safety of families and declining property values, to fears of losing the “heart of the community” in school closures. To prevent the development of opposing factions or damage to existing relationships, we created space for people’s emotion in a respectful and caring way by engaging people in values-based dialogue so that they could weigh both facts and values in a constructive process. We brought people together to build and support new and existing relationships so that these complex issues could be faced together.

Our role, at Dialogue Partners, was to reflect the voice of all participants to administration and trustees and to honor and acknowledge the diversity and perspectives of participants. This was not a “blue sky” visioning process where the goal was to make everyone happy and imagine a rosy future. Instead participants were asked to bring what was deeply important to them, take the time to understand the views of others as well as their own, grapple with the realities and challenges of the situation and propose solutions for the future.

Examples of Innovative Techniques:
- **Public Engagement Advisory Committee**: Citizens, staff and community organization representatives provided input and advice on the public engagement process for sector planning throughout the project.
- **Interview and Surveys**: Used to fully understand the issues and perspectives from multiple viewpoints and to develop a comprehensive public engagement plan for each round.
- **“Public Engagement 101” Workshops**: Provided information to assist parent councils, community leagues and partner organizations to understand the objectives, process of sector review as well as provide training to lead and host their own conversations.
- **“Come to the Conversation” Workbooks**: Used to raise awareness about the facts related to school space issues, funding, programs and enrollment and to create a frame for values based discussion.
- **Community Forums**: Used open space technology to gather input on principles and values for with a focus on identifying suggestions and strategies for space configuration and allocation.
- **“Come to the Conversation” Workshops**: Based on a modified charrette technique, created an opportunity for community and stakeholders to work through ideas and suggestions for space allocation and configurations, in a hands on way, with a focus on both the community and the individual schools.
- **“YOUth Talks”**: Ensure the voice of youth and students was heard we designed “YOUth Talks” where students were provided the space and opportunity to speak their mind and have their ideas recorded. Students worked together at specially designated sessions to identify what
was important to them about their school and community as well as to vote on the resulting priorities. In total there were 16 YOUth Talk sessions held in 16 schools with 353 participants.

What you can find in Appendix D from this project:
- Case Study
- Workbook

Part 7 – Terminated/Incomplete Projects

Dialogue Partners has never had a project terminated and has never been unable to complete a project that it has been responsible for. We take our promises very seriously. Through effective project management and delivery we deliver on time and on budget. We have experienced delays in projects for reasons beyond our control such as elections, changes in senior management or contract management and budget allocation issues. We currently have a project with Manitoba Hydro called Providing for the Future: A Public Engagement Process which we developed an engagement plan for in September 2011. Due to a provincial election the process was put on hold, which was followed shortly after by an announcement of the CEO leaving and a replacement search taking place. The new CEO has recently been appointed and is to begin February 2012. We are waiting approval to start once this item is on the agenda and approved.

Project Date (Mo/Yr) January 2011-Present

Client’s Name, Address and Phone Number:
David Anonsen, Acting Head Project Sustainability Review & Coordination Department Power Project Development Division Manitoba Hydro 18th floor 360 Portage Ave Winnipeg, MB R3C 0G8 Tel: 204-360-4958 or Email: danonsen@hydro.mb.ca

And/or

Bill Henderson, Manager Corporate Communications 18th floor 360 Portage Ave Winnipeg, MB R3C 0G8 Tel: 204-360-3499 or Email: bhenderson@hydro.mb.ca

We began the work for the City of Hamilton on this citizen engagement for values based infrastructure management process and developed a draft engagement plan in September 2011. Due to contracting issues, the work was put on hold in order for this RFP process to occur to ensure proper contracting procedures were met.
On one occasion working with the City of Calgary on a Park Planning project, Dialogue Partners was retained to develop a plan to engage stakeholders in resolving conflict and controversy over the development of a new park plan. When we initiated the work it was only then that they informed us that they had already created an engagement plan and had advertised for the event and that cancelling was not an option. Based on our experience in such situations we felt that the plan they had developed was not appropriate and would have escalated the conflict and controversy. It was not in the spirit of meaningful and effective engagement, and it did not follow the IAP2’s Core Values. We felt it would be unethical to complete the work in this way and so Dialogue Partners decided to walk away from the project. A month after doing so, the City re-hired us to complete the engagement activities for the City of Calgary’s Our City. Our Budget. Our Future project. Client contact information is available for this project, please feel free to request it.
Appendix A- Sample of a Notification or Advertisement

City of Calgary, Our City. Our Budget. Our Future.
- Banners and Communication tools
- Post Card, Information piece
- Meeting notices(5)
- A display advertisement to promote an online tool.

Edmonton Public School Board, Sector Planning Review
- What’s Happening, one pager overview
- Meeting Notice
The City of Calgary is engaging citizens to clarify their priorities about City services and the difficult decisions about how tax dollars should be spent for the 2012-2014 business planning and budget cycle. By 2016, Calgary City Council will have established a participatory budgeting process (Target 2, imagineCalgary Plan).
OUR CITY BUDGET

We want to hear from you on the City's business planning and budget process.
Get involved at calgary.ca/ourfuture.
Select a department to see their services that are delivered and to provide your input on budget increase, decrease or status quo.

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calgary.ca/ourfuture

PARTICIPATE!

DON'T WAIT. OUR CITY. OUR BUDGET. OUR FUTURE.
Our City, Our Budget, Our Future

Everybody's business
Understanding priorities
Making choices that matter

We want to hear from you on City services and budget priorities.

Community Forums

Thursday, April 7
7-10 p.m.
Glenmore Inn
Ballroom
2720 Glenmore Tr. S.E.

Friday, April 8
9:30 a.m.-12:30 p.m.
Kerby Centre – Gymnasium
1133 Seventh Ave. S.W.
Senior focus

Saturday, April 9
9 a.m.-noon
Coast Plaza Hotel
3316 33rd St. N.E.
Community org. focus

Have specific mobility/access requirements? Interpretive services? Please call toll free 1-866-269-1276 ext. 102 or email info@dialoguepartners.ca.

calgary.ca/ourfuture | call 3-1-1
Our City Budget Future

Understanding priorities
Making choices that matter

We want to hear from you on City services and budget priorities.

Community Forums

**Tuesday, April 5**
6:30-9:30 p.m.
Ambrose University College
150 Ambrose Cir. S.W.
Main Gymnasium

**Wednesday, April 6**
4:30-7:30 p.m.
University of Calgary
Dining Centre – Alberta Room
2500 University Dr. N.W.
Youth focus

**Thursday, April 7**
7-10 p.m.
Glenmore Inn
Ballroom
2720 Glenmore Tr. S.E.

**Friday, April 8**
9:30 a.m.-12:30 p.m.
Kerby Centre – Gymnasium
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calgary.ca/ourfuture | call 3-1-1
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<td>9 a.m.-noon</td>
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<td>Interpretive services? Please call toll free</td>
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<td></td>
<td></td>
<td>3316 33rd St. N.E.</td>
<td>1-866-269-1276 ext. 102 or email <a href="mailto:info@dialoguepartners.ca">info@dialoguepartners.ca</a>.</td>
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calgary.ca/ourfuture | call 3-1-1
We want to hear from you on City services and budget priorities.

Wednesday, April 6
4:30-7:30 p.m.
University of Calgary
Dining Centre – Alberta Room
2500 University Dr. N.W.
Youth focus

Thursday, April 7
7-10 p.m.
Glenmore Inn
Ballroom
2720 Glenmore Tr. S.E.

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Kerby Centre – Gymnasium
1133 Seventh Ave. S.W.
Senior focus

Saturday, April 9
9 a.m.-noon
Coast Plaza Hotel
3316 33rd St. N.E.
Community org. focus

Have specific mobility/access requirements? Interpretive services?

Please call toll free
1-866-269-1276 ext. 102
or email
info@dialoguepartners.ca
We want to hear from you on City services and budget priorities.

Thursday, April 7
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calgary.ca/ourfuture | call 3-1-1
How would you spend your tax dollars?  
Drop in to a community conversation and have your say.  
It's time to make choices that matter.

Your input will help guide how The City spends our tax dollars when City Council meets to consider its priorities in June. Have your say about City services and budget priorities now.

### Community Conversation Dates

- **Tuesday, May 10**
  6:30 p.m. to 9:30 p.m.
  Commonwealth Hall & Conference Centre
  3961 52nd Ave. N.E.

- **Wednesday, May 11**
  7 p.m. to 10 p.m.
  Fort Calgary – Officer’s Mess
  750 Ninth Ave. S.E.

- **Thursday, May 12**
  6:30 p.m. to 9:30 p.m.
  McKenzie Meadows Golf Course
  17215 McKenzie Meadows Dr. S.E.

- **Saturday, May 14**
  9 a.m. to noon
  Heritage Park Gasoline Alley – Mezzanine
  1900 Heritage Dr. S.W.

- **Monday, May 16**
  7 p.m. to 10 p.m.
  Calgary Winter Club
  4611 14th St. N.W.

To provide your input online and to see what Calgarians said in Phase 2: Understanding values and priorities, visit calgary.ca/ourfuture.
How would you spend your tax dollars?
Drop in to a community conversation and have your say.
It's time to make choices that matter.

Your input will help guide how The City spends our tax dollars when City Council meets to consider its priorities in June. Have your say about City services and budget priorities now.

Community Conversation Dates

Saturday, May 14
9 a.m. to noon
Heritage Park Gasoline Alley - Mezzanine
1900 Heritage Dr. S.W.

Monday, May 16
7 p.m. to 10 p.m.
Calgary Winter Club
4611 14th St. N.W.

To provide your input online and to see what Calgarians said in Phase 2: Understanding values and priorities, visit calgary.ca/ourfuture.
Hey, Calgary! Tell us how you think the City should be spending your tax dollars!
Scan the code, see the demo, get the App or go online at

www.budgetallocator.ca
Edmonton Public Schools | Sector Planning

WHAT IS HAPPENING AND WHEN?
Change is Coming... Be a part of it.

STEP 1 April – June
Identifying Criteria, Principles & Issues of Importance to Guide the Conversation

1. Interviews and Surveys | First step in finding out what is important. Information will be used to develop the Public Engagement Plan. Report posted online early May.
2. Work Books | Tell us what is important to you about your community and use of school space. Share ideas, issues and concerns that should be included in sector review.
   - May 10 – June 25, 2010
3. Workshop – Public Engagement 101 | What to Expect, How to Participate
   - Parent Councils, Community Leagues and Partner Organizations
   - May 19, 2010 9am -12pm and 7-9 pm
4. Community Forums – Everyone welcome! Come talk about what is important to you about your community and use of school space. Share your ideas, issues and concerns that should be considered in sector planning.
   - May 29 – South Central Sector, 9am -12:30pm
   - June 5 – West 1 Sector, 9am -12:30pm
   - June 19 – Central Sector, 9am -12:30pm
5. Youth Talk | Hearing what youth have to say. Visits and consultation with Grade 6 and 7 classes in sector schools.
   - May 28 to June 18.

STEP 2 September – October
Using the Principles, Values and Ideas from Step 1 to Develop Options for the Future

1. Workshops | You will consider the facts, data and community input and offer what YOU propose as an option going forward.
   - Sept 21 – Central Sector
   - Sept 23 – South Central Sector
   - Sept 25 – West 1 Sector
   - October 4 – Central Sector
   - October 5 – South Central Sector
   - October 9 – West 1 Sector
2. “Out of the Box” Think Tank | Everyone Welcome
   - All sectors.
   - We're inviting the City, province, community organizations and YOU. Think long term, think collaboration. Come to this all party discussion to talk about working together, long term and offer your "out of the box" ideas.

STEP 3 November – February
Public Consultation Results

2. EPSB Administration Report with Recommendations to Trustees – January / February
3. If there is a motion for school closure the Process for School Closure will follow as outlined in the Alberta Schools Act.

THROUGHOUT THE PROCESS April – February
If you can’t come out to a meeting, have your say online. Share your ideas and options for going forward.

1. Have your say online.
   - Launching May 28
2. City of Edmonton / Edmonton Public Schools – Thinking and Working Together | Reports and Updates on collaborative initiatives, plans and progress. Updates throughout the process.
3. Reporting and News Updates — What Was Said? Reports on each event will be posted to the website along with news updates.

For more information on Sector Planning and how you can become involved, please contact Dialogue Partners Inc.

TOLL FREE 1.866.269.1276
E MAIL info@dialoguepartners.ca
VISIT THE WEBSITE AT www.sectorreview2010.com

EDMONTON PUBLIC SCHOOLS
Making the best possible use of available resources so that all students have access to vibrant schools and quality programs

COME TO THE CONVERSATION

You are invited to...Participate in a WORKSHOP
Edmonton Public Schools Sector Planning Review
Central – South Central – West 1

What is sector planning?
Sector planning is about making the best possible use of available resources so that all students have access to vibrant schools and a range of quality programs in their sectors.

Sector review might mean change. Possible results include combining schools together, reorganization or relocation of programs or closure of some schools. Sectors are geographic areas of the City.

What will participants do?
This is a “hands on” workshop where you will review the input to date and the facts and data and propose options on how to move forward in ways that address these issues. You can work through the details in a group or on your own, and Edmonton Public School representatives will be on hand as an additional resource.

When and where are the workshops?
The workshops are “drop in” format – you attend at the best time for you and stay as long as you can.

<table>
<thead>
<tr>
<th>Sector Sector</th>
<th>Date and Time</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central Sector</td>
<td>Tuesday, September 21 4:00 pm – 9:00 pm</td>
<td>Queen Elizabeth School Cafeteria 9425 - 132 Avenue</td>
</tr>
<tr>
<td></td>
<td>Monday, October 4 4:00 pm – 9:00 pm</td>
<td>Victoria School of the Arts North Gym 10210 - 108 Avenue</td>
</tr>
<tr>
<td>South Central Sector</td>
<td>Thursday, September 23 4:00 pm – 9:00 pm</td>
<td>McNally School Library 8440 - 105 Avenue</td>
</tr>
<tr>
<td></td>
<td>Tuesday, October 5 4:00 pm – 9:00 pm</td>
<td>Vimy Ridge Academy Gym 8205 - 90 Avenue</td>
</tr>
<tr>
<td>West 1 Sector</td>
<td>Saturday, September 25 9:00 am – 1:30 pm</td>
<td>Jasper Place School East Gym 8950 - 163 Street</td>
</tr>
<tr>
<td></td>
<td>Saturday, October 9 9:00 am – 1:30 pm</td>
<td>Ross Sheppard School Small Gym (South) 13546 - 111 Avenue</td>
</tr>
</tbody>
</table>

For more information on Sector Planning Review and how you can become involved, please contact Dialogue Partners Inc.
TOLL FREE 1.866.269.1276 E MAIL info@dialoguepartners.ca
PROJECT WEBSITE www.sectorreview2010.com
Appendix B- Past Project Report From the City of Calgary

Public Engagement Process & Results
June 2011

2031 Neepawa Avenue
Ottawa, ON Canada
K2A 3L7
Telephone: 613-724-2450
Toll-Free: 1-866-269-1276
Web: dialoguepartners.ca
E-mail: info@dialoguepartners.ca
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Part 1 – Overview and Introduction

This project: “Our City. Our Budget. Our Future. Delivering City services that support quality of life and value for money” represents a change from previous engagement and communication projects sponsored by The City. It has been a holistic approach to engaging people in a conversational journey about City services, raising understanding and gathering input on the development of 3-year business plans, budget and priorities for 2012-2014, and providing linkages with Council’s longer-term strategic plans (sustainability direction).

As The City begins the journey towards implementation of the vision articulated in ImagineCALGARY and the process for Planit, this project has supported the long-term transformation in changing the way The City does business. This project initiated an ongoing conversation with citizens, staff and Council in supporting the building of the future that Calgarians imagine, and the alignment of City services and Administration towards that journey.

The engagement process has focused on a generative dialogue with participants to share information on City services and budget, understand citizen and staff values and priorities, and engage all participants in discussions about the pros, cons and trade-offs of future spending priorities and City direction.
The context for the engagement process
This generative and deliberative dialogue with participants has focused on budgets and spending as a reflection of values, priorities and needs, and as a tool to deliver services that are important to staff, Council and citizens.

With an increasing demand from citizens to provide opportunities to be engaged in issues and decisions that they are interested in or which affect them, municipalities need to be able to respond meaningfully and effectively.

Citizen participation in decision-making is key to good governance. Meaningful and effective public engagement improves the quality of decisions made, facilitates citizen understanding of issues and government processes, ensures transparency and accountability, fosters respect for the views of others, and increases support, understanding and ownership of decisions made. Of equal importance, citizen engagement builds relationships and trust among government, citizens and communities.

"The field of civic engagement is advancing along several dimensions: scaling up both in numbers and diversity of people involved; increasing the continuity of participatory mechanisms over time; strengthening the links between dialogue, decision-making and action... and increasing community capacity for collaboration."

Municipalities around the globe are now spending time focusing on defining what meaningful and effective participation means to them, their citizens, their communities, their elected officials, their staff and the organization. They are establishing policies, guiding principles, structures, tools and staff within their organizations to support public engagement on a permanent, ongoing basis. This ‘embedded’ approach to public engagement ensures consistency and best practices across all public engagement activities and builds both internal and community capacity and knowledge. All of this together is what defines meaningful and effective public engagement within a citizen centered government.

As citizens begin to participate more frequently and vocally in such initiatives, and on issues that are important to them, their capacity and ability to participate also increases. They build knowledge and understanding about the organization and how it works, its goals and priorities, the variety of issues and inter-connectedness and the government’s decision-making processes. They also develop an understanding of public engagement itself. This capacity allows citizens to become engaged in more complex issues and in more complex ways over time.
In addition, recent research has demonstrated a growing distrust and cynicism towards government at all levels [in western democracies] and an increase in activism and grass roots activities by citizens outside of formal engagement processes. A meaningful engagement process affords a municipality with an opportunity make better decisions, build community and at the same time increase trust and credibility between citizens and the municipality.

Results of the engagement process
Over the course of three and half months, over 23,000 citizens, City employees and organizations participated in an unprecedented conversation about City services, values and priorities and the trade-offs and balances for the next three years. This conversation had an exceptional depth and breadth of participation, with people from all walks of life, backgrounds and experiences providing considered, constructive and thoughtful input. Comparable to participatory budgeting initiatives around the world (see Part 3B), this engagement process has involved the numbers and an extent of participation not previously seen in North America, especially in such a short time frame. In addition, innovative and ground breaking approaches to dialogue, conversation and engagement were designed and implemented to enormous success.

Thoughts, ideas and considered input have allowed us to summarize views from participants about valued and important City services, along with suggestions for improvements, enhancements and changes to operations, efficiency and delivery. Participant input has provided valuable feedback on spending priorities including increases, decreases and status quo spending suggestions.

"Trust is a key word in this transition. Initiating a democratic governance effort requires a basic level of goodwill: citizens have to trust that officials will be using their input and that the effort will make a real impact; public officials and employees have to trust that citizens are willing and able to participate in reasonable, productive ways.”

Changing the Way We Govern: Building Democratic Governance In Your Community
National League of Cities, November 2006

We are grateful to all participants for the trust and faith they placed in the process, and also in us and we have worked hard to honour their views, ideas and wisdom. We are awestruck by the depth of experience and also by the commitment, effort and energy people put into this engagement process and we are deeply grateful to have been a small part of it. This report provides an overview and summary of the results of what we heard and who participated. The rich details of every word that was provided, and our coding and analysis of that data is also available for review and consideration.

We have high hopes that the City of Calgary will continue this transformative work of building and
City of Hamilton
C11-12-12

connecting community and staff in conversation to realize the vision of Imagine CALGARY.

As was simply stated by a participant in the engagement process: “Thanks for finally including the shareholders, a.k.a. the citizens of Calgary, in this important discussion.”

With gratitude,
The team at Dialogue Partners

This report reflects a summary of the themes and highlights of participation from the Our City. Our Budget. Our Future. engagement process between mid February and late May 2011. It is based on contributions made by participants, but the analysis of the input in this summary lies solely with the Dialogue Partners Team.

Abiding by the Code of Ethics of the International Association for Public Participation (IAP2) and the International Association of Facilitators (IAF), the Dialogue Partners team have tried to reflect the themes and summary of participant input from the conversation in a way that captures the essence of what was shared. Any mistakes or errors in this summary are based solely on our interpretation and analysis of that input.

Stephani Roy McCallum,
Certified Professional Facilitator
Dialogue Partners Inc.

FULL REPORT CAN BE FOUND HERE


OR

TRY THIS LINK

Stephani Roy McCallum, CPF
Managing Director
Dialogue Partners Inc.

SUMMARY OF EXPERIENCE

Stephani Roy McCallum is the Managing Director of Dialogue Partners Inc. She has managed more than 150 successful public engagement projects and has facilitated over 300 events and meetings in 18 years in the field. Leading and managing numerous projects that have involved more than 30,000 participants she has worked on complex issues ranging from participatory budgeting, education, land use, health care, transportation, nuclear waste and environmental issues. She has worked across Canada at the national, provincial and local level, and in the U.S.A., Australia and Europe.

Stephani is a Certified Professional Facilitator with the International Association of Facilitators (IAF) and was the 2008 President of the International Association for Public Participation (IAP2). She is a licensed trainer for IAP2 of the Certificate in Public Participation, an Assessor and Coach of new candidate trainers for IAP2, as well as lead developer and trainer of IAP2’s Emotion, Outrage & Public Participation program. In addition, Stephani regularly teaches, speaks and writes on advanced issues and innovations in the engagement field.

DEMONSTRATED EXPERIENCE

- In depth experience in citizen engagement on complex issues
- Extensive experience with government at all levels
- Certified Professional Facilitator
- Extensive planning & process design of citizen / public engagement projects
- Reputation for innovative, creative and effective process design and engagement events
- Extensive Project Management of large-scale, high profile projects
- Accomplished & experienced trainer and coach
- International reputation for high quality, innovative work

EMPLOYMENT HISTORY

Dialogue Partners Inc.
Managing Director

Circle Associates: Public Involvement & Stakeholder Relations
President

City of Ottawa, Ottawa Transition Board & Regional Municipality of Ottawa-Carleton
Program Manager, Public Involvement & Special Projects / Supervisor, Advisory Committees & Boards / Manager, Council & Committee Services / Team Lead, Ottawa Transition Board – Council & Committees / Committee Coordinator

City of Nepean
Manager, Council & Committee Services / Advisory Committee Coordinator / Team Lead, Municipal Amalgamation Special

dialoguepartners.ca
City of Hamilton
C11-12-12

Project

Policy Analyst / Program Officer

EDUCATION

- 4 year program, Sociology, Carleton University
- Certificate in Authentic Leadership, Naropa University
- Certified Professional Facilitator (International Association of Facilitators)
- Certificate in The Power of Apology in Conflict Resolution; Center for Public Policy Dispute Resolution, The University of Texas School of Law
- Certificate in Outrage Management, Peter Sandman
- Certificate in Advanced Consensus Building, Larry Susskind, Consensus Building Institute
- Licensed Trainer, International Association for Public Participation Certificate Program in Public Participation (made of up 3 courses) and Emotion, Outrage & Public Participation
- IAP2 Assessor, Mentor & Coach for candidate Certificate and Emotion & Outrage trainers

MEMBERSHIPS

- International Association for Public Participation
- International Association of Facilitators
- International Association of Impact Assessment
- Canadian Society for Training and Development
- National Coalition of Dialogue and Deliberation

SAMPLING OF SPEECHES & PRESENTATIONS

- Resolving Conflict and Embracing Emotion in Complex Public Engagement Projects, Innovations in Public Consultation & Engagement Conference, September 2011, Toronto, Ontario
- Uncharted Territory: Building community ownership and resilience in times of crisis, Australian Emergency Management Institute, May 2011, Mount Macedon, Victoria, Australia
- Meaningful Stakeholder Relations for Public Affairs Professionals, Canadian Blood Services National Public Affairs Conference, Ottawa, October 2010
- Facts + Values = Sustainable Decisions, International Sustainable Development Working Group, Biodiversity Community of Practice, Ottawa, April 2010
- Why are these people yelling at me? Moving from outrage to engagement, International Association of Public Participation Australasia Conference, October 2009
- Co-Development with National Coalition for Dialogue and Deliberation, Principles for Public Engagement, Presented to White House Office of Citizen Engagement, 2009
Tannis Topolnisky
Senior Consultant
Dialogue Partners Inc.

SUMMARY OF SKILLS AND EXPERIENCE

Tannis Topolnisky is a Senior Consultant at Dialogue Partners Inc. and has ten years of public engagement experience. She has worked in such areas as legislation, policy and program development, management of contaminated sites, municipal budget processes and public education.

She has diverse experience engaging communities, consumer interest groups, non-governmental organizations, professional and industry associations, academics, patient groups and Aboriginals. She has planned and facilitated projects where there is high concern and emotion within communities with potential risk and impact to human health and quality of life.

She has assessed, analyzed and evaluated many public involvement strategies and approaches, and provided expert advice to senior managers on most effective means of involving those affected.

Tannis has extensive experience providing facilitation, training support and capacity building services to both government and non-government organizations across the country. She has became a licenced trainer for the International Association of Public Participation’s Certificate Program in Public Participation in 2011.

DEMONSTRATED EXPERIENCE

- Experience conducting stakeholder mapping and issue analysis
- Extensive planning & design of citizen engagement projects
- Work with various federal government departments
- Develop and delivery of various public engagement related training
- Small and large group facilitation experience
- Evaluation of public engagement processes
- Project management
- Licensed IAP2 Certificate trainer

She has assessed, analyzed and evaluated many public involvement strategies and approaches, and provided expert advice to senior managers on most effective means of involving those affected.

Tannis has extensive experience providing facilitation, training support and capacity building services to both government and non-government organizations across the country. She has became a licenced trainer for the International Association of Public Participation’s Certificate Program in Public Participation in 2011.

EMPLOYMENT HISTORY

Dialogue Partners Inc.
Senior Consultant 2011 – Present

Health Canada
Senior Public Involvement and Risk Communications Officer 2005 – 2011
Health Canada
Acting Public Involvement Manager

Health Canada
Regional Public Involvement and Outreach Officer

EDUCATION

University of Alberta, Department of Human Ecology
Master of Science in Textiles and Clothing
Conferred June 1998

University of Alberta, Department of Home Economics
Bachelor of Science in Home Economics (with Distinction)
Major: Textiles, Clothing and Culture
Conferred June 1996

Training Courses, Workshops and Seminars:
- Meetings That Work
- Group Facilitation
- Plain Language
- Communicating Health Risk Information to Stakeholders
- Emotion, Outrage and Public Participation
- Labour Relations Training for Managers

PROFESSIONAL DESIGNATIONS AND AFFILIATIONS

Licensed Trainer
International Association of Public Participation,
Certificate Program in Public Participation (made of up 3 courses)

Certificate in Public Participation
International Association for Public Participation
Completed May 2007

International Association of Public Participation (IAP2)
Member of the International Association for Public Participation
2002 - Present
Kim Kolenc, BA
Senior Consultant
Dialogue Partners Inc.

SUMMARY OF EXPERIENCE
Kim Kolenc is a Senior Consultant with Dialogue Partners Inc. Prior to joining the company, she was employed in both the upstream and downstream operations of the oil and gas industry and focused her attention on the practice of Stakeholder Engagement and Aboriginal Consultation.

She is experienced in large-scale projects such as federally regulated pipelines and comprehensive municipal budget discussions as well as smaller-scale projects such as an elementary school courtyard revitalization and land acquisition for natural gas drilling projects.

Kim sees each engagement project as a new opportunity to create, design and implement unique processes and programs that allow stakeholders to actively engage in dialogue. These experiences and projects have provided Kim with an opportunity to successfully work with a wide variety of stakeholders including municipal governments, environmental organizations, industry groups, rural landowners, advocacy groups and Aboriginal and Metis communities.

EMPLOYMENT HISTORY

Dialogue Partners Inc. 2011-Present
Senior Consultant

TERA Environmental Consultants 2009 – 2011
Community Liaison

Petro-Canada 2008-2009
Aboriginal Affairs Advisor

Petro-Canada Oil Sands 2008
Stakeholder & Regulatory Affairs Advisor
EDUCATION

University of Alberta, Faculty of Arts
Bachelor of Arts Degree in Political Science, Minor in Christian Theology
Certificate in Globalization and Governance

Conferred June 2003

Justice Institute of BC
Collaborative Conflict Resolution Program (on-going)

On-going

Training Courses, Workshops and Seminars:
• Analyze This: Making Sense of Conflict in Public Engagement
• Standing in the Fire: Transforming Conflict through Collaboration
• Group Facilitation Skills for Public Involvement
• The Creative Negotiating Workshop
• Creative Conflict Resolution: Making the Most of Differences
• Foundations of Collaborative Conflict Resolution
• Building Your Communication Toolbox
• The Art of Reframing
• Negotiation Skills, Level 1
• Meditation Skills, Level 1
• Dealing with Anger
• Leading and Managing Change-Executing Change

PROFESSIONAL DESIGNATIONS AND AFFILIATIONS

International Association of Public Participation (IAP2)
Member of the International Association for Public Participation

2008-current

IAP2, Wildrose (Alberta) Chapter
Board of Directors Member with Wildrose Chapter IAP2

2011-current

International Association of Public Participation
Certificate in Public Participation

Completed June 2009
SUMMARY OF EXPERIENCE

Brian Menzies is a Senior Consultant with Dialogue Partners Inc., and he has over 10 years of experience managing public engagement projects for governments and corporations. He has extensive experience managing stakeholder relations and public policy consultations, including an international trade dispute, First Nations negotiations, budget consultations, natural resource industry restructuring, and health care issues.

Prior to joining the company, Brian was the Chief of Staff for the BC Minister of Health managing challenging public policy issues and cultivating stakeholder relations. Before this, he worked as a public affairs consultant with government, industry, and interest groups. Brian helped his clients’ employ a variety of consultation techniques that engaged their stakeholders in joint problem solving that created innovative solutions to complex public challenges.

Brian specializes in helping to manage controversial public issues through the application of public engagement processes. Brian has a Masters of Arts in Conflict Analysis and Management from Royal Roads University. He has completed all certification courses from the International Association of Public Participation, a diploma in public relations from the University of Victoria, and has studied mediation and other applications of conflict resolution from the Justice Institute of British Columbia.

EMPLEOYMENT HISTORY

Dialogue Partners Inc.  Senior Consultant  2012

Ministry of Health, Government of British Columbia  Chief of Staff for the Minister of Health  2009 – 2011

City of Hamilton
C11-12-12

Ministry of Forests, Government of British Columbia
Chief of Staff for the Minister of Forests
2001 – 2004

Official Opposition of British Columbia
Research and Communications Officer
1996 – 2001

EDUCATION

Master of Arts, Conflict Analysis and Management, Royal Roads University
Bachelor of Arts studies, Political Science and Economics, University of Victoria
Certificate in Public Participation Program, International Assoc. of Public Participation
Diploma in Public Relations, University of Victoria

Training Courses, Workshops and Seminars:
• Applied Conflict Skills in Multi-Party Dispute Processes, Royal Roads University
• Organizational Diagnosis (Sam Kanner, Phd), Community at Work, San Francisco
• Group Facilitation Skills, (Sarah Fisk, PHd), Community at Work, San Francisco
• Conflict Resolution, Mediation and Negotiation Training, Justice Institute of British Columbia
• Transformative Speaking, Royal Roads University Continuing Studies
• Developing & Understanding Protocols in Respect of First Nations, Royal Roads University
• Skill Building with Master Mediators, US Institute of Environmental Conflict Resolution
• Social Media: Improving the Sustainable Decision Making Process, IAP2 Conference
• Online Dialogue Training, Association of Conflict Resolution
• Use of Social Network Tools for Public Participation, US Institute of Environmental Conflict Resolution
• Community Grassroots Campaign Training, Public Affairs Council, Washington, D.C.

MEMBERSHIPS AND VOLUNTEER WORK

International Association for Public Participation, Member
Association of Conflict Resolution, Member
International Association of Conflict Management, Member
Gorge Tillicum Community Association, Director
BC Premier Leadership Campaign, Communications Director
SUMMARY OF EXPERIENCE

Tamara McCarron is a Senior Consultant with Dialogue Partners Inc. Prior to joining the company, she held progressively senior positions with not-for-profit, post secondary, and private sector organizations. In these positions, she cultivated relationships and formed strategic partnerships with a number of organizations to provide exemplar service and stakeholder satisfaction. As a result, Tamara has demonstrated her ability to positively impact the overall bottom line. With a passion for technology and communication, Tamara lead an organization through a branding project which consisted of provincial engagement sessions of key stakeholders to the development of a multi-portal website.

She is experienced in bringing diverse small to medium sized groups together to vision, craft, and commit to exploring possible solutions to complex challenges. A dynamic presenter, Tamara enjoys working with groups and has been a guest presenter for many University and Community groups.

An active volunteer, Tamara serves on a number of not-for-profit boards. For her commitment to the community and her success in business, Tamara was named as one of Calgary’s Top 40 Under 40.

EMPLOYMENT HISTORY

**Dialogue Partners Inc.**

Senior Consultant  
2012

**Senior Consultant and Founder**  
PascaLynne Consulting Ltd., Calgary, AB  
January 2007 – January 2012

**Director, Development and Communications**  
Science Alberta Foundation, Calgary, AB  
August 2005 – October 2007

**Women in Science and Engineering Program Director**  
University of Calgary, Calgary, AB  
May 2001 – August 2005

Demonstrated Experience

- Proven ability to manage complex projects resulting in a successful outcome
- Superior communication skills and proven ability to communicate complex issues in effective ways
- Extensive Project Management of small to medium-sized projects
- Experience in numerous forms of virtual and online engagement including blogs and social media
- Reputation for dynamic, engaging and enthusiastic facilitation
EDUCATION

Master of Business Administration 2005
Haskayne School of Business, University of Calgary, Calgary, AB
- European Summer School of Advanced Management Delegate

Bachelor of Science 2000
Faculty of Science, University of Calgary, Calgary, AB

Supervisory Development Certificate 2005
Continuing Education, University of Calgary, Calgary, AB

Training Courses, Workshops and Seminars:
- IAP2 Certificate in Public Participation
- Communities Collaborating Institute: Leadership That Transforms Communities, Tamarack
- The Public Victory
- Supervisory Development Certificate, University of Calgary
- Leading from the Inside Out
- Energizing your workplace: Inspiring and Motivating People
- Emotional Intelligence
- Interpersonal Communications
- Fundamentals of Leadership
- Fundamentals of Supervision
- Reframing Personal and Professional Effectiveness
- The Role of a Leader
- Creating a High Achieving Culture

DISTINCTIONS, AWARDS AND ACHIEVEMENTS

- Faculty Training, Rotary Leadership Institute District 5360
- Rotary International – Best Cooperative Project
- Rotary - District Governor’s Citation
- Women’s Executive Network (WXN) Class of 2010
- Leadership Calgary - Class of 2009
- Top 40 Under 40
- Awarded Alberta Heritage Scholarship
- Awarded Graduate Student Distinction Award
- Awarded Charles S. Nobel Leadership Award
- YWCA Young Woman of Distinction Nominee
- Women of the Ninety’s Award
Ian K. McCallum, MA
Managing Associate,
Dialogue Partners Inc.

SUMMARY OF SKILLS AND EXPERIENCE

Ian McCallum has over 10 years experience in public policy and stakeholder and government relations, both in a large urban municipality and at the federal government.

Ian has worked in various levels of the legislative and political process – federally, provincially and municipally, both within a grassroots community environment as well as within highly structured organizations. From the fall of 1997 to the spring of 2004, Ian worked with the Regional Chair of Ottawa-Carleton, who then became Mayor of Ottawa, Canada’s fourth largest municipality. Ian served as the Community Outreach Officer, where diverse issues from social services to recreation, land use, housing and transportation were his main focus. Consistent in all these issues were the research and information gathering requirements, issue analysis and collaborative grassroots approach required for dealing with the many varied voices and opinions in both community halls and the halls of decision making.

As an expert in stakeholder relations and community outreach, Ian is key to managing and enhancing relationships with diverse people. Ian was instrumental in helping to build a diverse group of religious leaders into Interfaith Ottawa and its Steering Committee. The Interfaith Committee worked in concert to speak out against hate to enhance understanding in the broader community by developing strategic linkages, awareness and community projects. He has worked closely with many organizations, associations and unions with concerns on municipal issues and building broader coalitions.

Ian is a graduate of Carleton University with a Master of Arts in Public Administration, and Bachelor of Arts from the University of Guelph in Canadian History and Rural Extension Studies. In the course of completing his master’s program, Ian conducted research on the Nuclear Waste Management Organization, as well as on community views and support for brownfield redevelopment and mitigation of environmental contamination. Ian has extensive training in strategic environmental assessment, facilitating public policy issues and is a Certified Public Participation Practitioner from the International Association of Public Participation.

EMPLOYMENT HISTORY

Dialogue Partners                                           2008 - Current
Managing Associate

Demonstrated Experience

- Extensive experience in conducting conflict assessments, stakeholder mapping and issue analysis
- Extensive experience working in and alongside Federal, Provincial and local governments and agencies
- Expert in emerging social media and e-tools for online collaboration
- Extensive experience on engagement on wicked and complex issues
- Extensive experience working in a project team focused on objectives to move large-scale, high profile projects through to successful completion
Eco Power Solutions  2004
Contractor, Canadian Government Relations Manager

City of Ottawa – Office of the Mayor  2000 –2004
Community Outreach Officer

Regional Municipality of Ottawa Carleton, Office of the Regional Chair  1997 –2000
Special Assistant to the Regional Chair

Politicians and Campaigns  1993 - 1997
Communications and correspondence support to two Ministers and a Senator, as well numerous election campaigns.

EDUCATION

Carleton University, School of Public Policy and Administration  Conferred February 2008
Master of Arts in Public Administration

University of Ottawa, Faculty of Business Administration  Conferred June 1995
Certificate in Business Administration

University of Guelph, Faculty of Arts, History Department  Conferred June 1993
Honours Specialized Bachelor of Arts, (Canadian History)

Training Courses, Workshops and Seminars:
• International Association of Impact Assessment Conference, “Power, Poverty and Sustainability”, Stavanger Norway, 2006
• International Association of Public Participation Conferences, 2011 Toronto, Montreal 2006 and Portland 2005
• Campaigns and Elections Conference, Toronto 1999
• Client Centred Service
• Building and Leading Effective Teams
• Essentials of Project Management

PROFESSIONAL DESIGNATIONS AND AFFILIATIONS

Certificate in Public Participation  2007
International Association for Public Participation

International Association of Public Participation (IAP2)  2005 -Present
Member of IAP2
• Secretary to the Board of IAP2 Canada  Present - 2nd Term

International Association of Impact Assessment  2006 - Present
Member of IAIA
SUMMARY OF EXPERIENCE

Charlotte Young, Ph.D., has over twenty-five years of experience in collaboration. She provides facilitation, mediation and consensus building processes to help develop, evaluate, and support public policy; and to create optimally functioning organizations. She designs and leads events involving diverse expertise and multiple jurisdictions that promote common understanding; encourage creative thinking; and enable groups to achieve broadly-supported, enduring solutions.

Charlotte holds a Ph.D. from the University of Michigan. She is a certified mediator, and facilitator for True Colours personality strengths inventory and graphic recording.

EMPLOYMENT HISTORY

Dialogue Partners Inc.
Senior Associate

ENVision...synergy
Director of Practice

Clients include:
- Federal government such as:
  - Canadian Forest Service
  - Office of Emergency Management
- Provincial government such as:
  - Alberta Ministries of Environment, of Municipal Affairs and Housing
  - Ontario Ministries of Agriculture, of Natural Resources, of Transportation
- Municipalities, such as:
  - Credit Valley Conservation Authority
  - Municipalities of Chicago, IL, Clarington, ON: Port Hope, ON; Toronto, ON
- Non-governmental organizations such as:
  - Environmental Defence Canada
  - Hamilton Community Foundation
  - Sustainability Network

Argonne National Laboratory, Argonne, IL. USA
Assistant Environmental/Social Scientist

DEMONSTRATED EXPERIENCE

- Creative problem solver who initiates and directs policy and organizational effectiveness interventions to improve environmental and natural resources decisions and compliance.
- Exceptional skills in facilitation and linking interests of diverse participants.
- Broad knowledge of environmental and natural resource issues.
- Sophisticated capacity to conceptualize innovative alternatives and solutions, and analyze their effectiveness.
Clients included:
- US Department of Energy
- US Department of the Navy and Air Force

SKILLS

Facilitation, negotiation, conflict management
- Implement strategic planning, policy dialogues, advisory group sessions, workshops, and focus groups to advance organizational and policy effectiveness. Results include:
  - Partnerships (e.g., between Trade Unions and a municipality, among ENGOs and a municipality)
  - Input on environmental policy decisions (e.g., pesticide reduction strategies, City of Toronto’s master plan for bio-solids) and priorities for research (e.g., Biodiversity Science Forum)
  - Additional staff; clarified roles; restructured and merged organizations
  - Clarified visions, and agreed-to priority strategies (e.g., Ontario’s first strategic plan for environmental education; Environmental Defence-Canada)

Public policy/strategies
  Design, direct and evaluate innovative activities for governments and utilities to solicit stakeholder input for environmental protection, and clean-up. Results include:
  - Outstanding recognition for a national program that now serves as a model for future efforts
  - Description of socio-economic, land use and recreation impacts and mitigation strategies
  - Comparison of four approaches to public consultation for nuclear waste management.
  - Development of large group facilitation methods for the 2003-2008 Forest Strategy
  - Recommendations for effective tree planting programs
  - Description of state-of-science for bio-mass harvesting

Evaluation
  Conceptualize and implement complex evaluations and needs assessments. Results include:
  - Input for policy, research and operations of air quality monitoring in Canada
  - Improved environmental programs/ curricula
  - Guidelines for sustainable organizations; Identification of training requirements
  - Research tools for program managers to use to evaluate conflict resolution and public participation initiatives

Organizational effectiveness/ institution strengthening
  Design, promote, and lead events to improve organizational success. Implement technical assistance, meetings, interviews, retreats, and training in Bolivia, Canada, China, the Netherlands and the US. Results include:
  - First of its kind staff development initiative for 1500 staff in facility and landscape management
  - Increased ability to implement environmental programs and increased visibility of environmental protection functions
  - Description of environmental NGOs’ organizational development status
  - Reprioritized training foci; Clarified missions
Streamlined communications channels
Identification of work duplication
Increased capacity to manage conflicts
Design and delivery of training in team building, presentation skills, training techniques, program evaluation, public participation, audience analysis, organizational life cycles, partnerships, conflict management/collaboration, and strategic planning.

Graphic recording
Pictorially create murals during group work to promote creative thinking and offer a focal point for problem solving. Records include:
- Health Council of Canada: Electronic newsletter
- Canadian Council for Dialogue and Deliberation: Participatory budgeting
- Water Leaders of Gordon Foundation: Media relations
- Various conferences (Horizontal Policy Initiatives, Ottawa; Green Business Summit, Toronto; Ontario Urban Forest Council, St. Catherines)
- Ontario Land Trust Alliance: Vision and strategies

Project leadership/management
Write reports/proposals, lead staff/project teams, manage budgets and schedules. Directed the Division of Professional Development at Chicago Park District. Results include:
- Creation of and monitoring system for budgets
- Revised policies for professional development, intern program
- Doubling of staff
- Preliminary research on corporate universities
- Assembly and leading of national project teams
- New programmatic areas and conceptual approaches tailored to meet clients' needs
- Project funding that exceeded all same-level colleagues at a research lab in a unit of 50 technical staff

EDUCATION
Ph. D. University of Michigan, Ann Arbor, MI
M. S. Michigan State University, E. Lansing, MI
B. S. Lock Haven St. College, Lock Haven, PA
Mediator, Center for Conflict Resolution, Chicago Bar Association, IL
Facilitator:
- Environmental Issues Forum/ Kettering Foundation
- Great Lakes Consensus
- True Colours
- Graphic Recording

Author/co-author of 80+ papers and publications. Available upon request
Offered 50+ presentations and workshops at professional meetings. Available upon request
SUMMARY OF EXPERIENCE

In between leaping off gorges in Zambia, swimming with sea lions in the Galapagos or backcountry camping in the Rockies, Brad has established a solid project management and leadership reputation for getting things done.

With over two decades of professional and service experience in the Not for Profit environment, including staff leadership and human resources, business management, systems development, facilities management, and diversity training, Brad has consistently met or exceeded performance, outcomes and goal expectations.

Brad is a global citizen, social justice advocate, and anti-violence and environmental campaigner, who understands the complexity of systems and sustainability frameworks.

Specialties:

System thinking; Training and group process facilitation; Appreciative Inquiry; Project management. Diversity and Social Inclusion.

EMPLOYMENT HISTORY

Consultant May 2010 – Current

YMCA of Greater Toronto Manager, Systems, Planning and Projects Jan 2006 – Mar 2010

YMCA of Kitchener-Waterloo General Manager, Member’s Services Nov 2001 – Oct 2005
EDUCATION

Naropa University, Boulder, CO  May 2011
Masters of Arts Environmental Leadership

Colorado State University, Fort Collins, CO  May 2011
Community-Based Development Certificate

Naropa University, Boulder, CO  April 2008
Authentic Leadership Certificate

York University, Toronto, ON  June 1992
Bachelor of Arts Degree in Political Science

Seneca College, Toronto, ON  June 1981
Diploma, Engineering Technology

Training Courses, Workshops and Seminars:
- Leading Profound Innovation
- Trainer of Trainers Certification
- Mind Body Specialist Certification
- Awakening the Dreamer Facilitator
- YMCA Annual Giving Congress
- United Way Canvasser Training
- Diversity and Inclusion Champion

PROFESSIONAL DESIGNATIONS AND AFFILIATIONS

Authentic Leadership Professionals

SAMPLING OF SPEECHES & PRESENTATIONS

- The Ecology of Cities: A Systems Approach, Naropa University, 2009
- Leadership in the Future - The Emergent Leader, Naropa University, 2009
- Diversity Leadership Seminar, YMCA 2006-2009
- Business Continuity Planning (BCP), YMCA 2008-09
- YMCA Safety and Emergency Procedures, YMCA 1999-2009
- S.A.M. College, Asset Stream – Seminar Presenter, 2002
SUMMARY OF EXPERIENCE

Howard Williamson is an associate with Dialogue Partners Inc. and has over 25 years of communications and community engagement experience in Canada. Howard's recent work has focused on multi-disciplinary teams assembled for the purpose of obtaining public input into the design of environmental engineering projects and community planning processes. He is widely recognized for his success in coordinating public consultation processes and managing the communications surrounding public projects.

In addition to a certificate in public participation from the International Association for Public Participation (IAP2), Howard has completed numerous community engagement courses with the Environmental Protection Agency in the United States. He recently completed a certificate course on emotion, outrage and public participation with the IAP2.

EMPLOYMENT HISTORY

Dialogue Partners Inc.  2010 - Present
Associate

Williams Consulting Inc.  1994 – Present
Present

EDUCATION

Master of Business Administration  2005
Haskayne School of Business, University of Calgary, Calgary, AB
• European Summer School of Advanced Management Delegate

Bachelor of Science  2000
Faculty of Science, University of Calgary, Calgary, AB
Supervisory Development Certificate 2005
Continuing Education, University of Calgary, Calgary, AB

Training Courses, Workshops and Seminars:
McMaster University, Faculty of Social Sciences BA (Hons)
Certificate in Outrage Management, International Association for Public Participation
Certificate Program in Public Participation, International Association for Public Participation
Public Engagement Courses, Environmental Protection Agency (EPA)

MEMBERSHIPS

Ottawa Chamber of Commerce
International Association for Public Participation
Ottawa Executives’ Association

PUBLICATIONS

Buildings Magazine (Iowa, USA) August 2003
“Canadian Firm Builds Mould-Free Solutions for School Portables”

Municipal World (Canada) March 2006
“Climate Change: The Challenge to Canadian Municipalities”

Municipal World (Canada) March 2010
“Anatomy of a Successful Landfill Expansion”
Emily Gallant  
Junior Consultant  
Dialogue Partners Inc.

SUMMARY OF EXPERIENCE

Emily Gallant is a Junior Consultant with Dialogue Partners Inc. She has helped coordinate and facilitate many public sessions that deal with complex and emotional issues in health care, education, and aboriginal rights.

In her work with Dialogue Partners, Emily has had her hands in a variety of public engagement projects that deal with controversial and complex issues with high emotion. She has created innovative ways for youth to participate in engagement practices, and promoted the importance of the youth’s collective voice. She has employed her creativity, flexibility and imagination to design innovative and effective public process, events and activities online and face-to-face for multiple diverse groups of participants.

Emily has completed a variety of training courses, including IAP2’s Public Participation certificate, and advanced courses in conflict resolution.

EDUCATION

- Bachelor of Arts, English, Dalhousie University
- Analyze This: Understanding Conflict in Public Engagement (1 day course)
- Standing in the Fire: Solving Complex Problems Through Collaboration (2 day Advanced Course)
- IAP2 Public Participation Certificate (5 day course)

MEMBERSHIPS

International Association for Public Participation
Hilary Best, BA  
Facilitator  
Dialogue Partners Inc.

SUMMARY OF EXPERIENCE

Hilary is a facilitator with three years of experience in local civic engagement projects. She has experience in developing and executing public engagement and consultation strategies, with a focus on sustainable and healthy communities planning.

She is a leader in the field of youth outreach and engagement. Most recently, she co-curated the exhibit *The Fourth Wall: Transforming City Hall* which explored best practices for civic engagement and public participation. Many of the recommendations from this exhibit are being explored by the City of Toronto.

Hilary also brings experience as a journalist and researcher. She has written for many publications including Spacing Magazine, Corporate Knights Magazine, Alternatives Journal and the McGill School of the Environment Review.

<table>
<thead>
<tr>
<th>EMPLOYMENT HISTORY</th>
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| **Dialogue Partners Inc.**  
Facilitator  
| 2012 - Present |
| **Dave Meslin/PigeonHat**  
Project Assistant  
| 2011 - 2012 |
| **Dillon Consulting Ltd.**  
Planner  
| 2010 - 2011 |
| **Centre for Social Innovation**  
Agent of Change  
| 2010 - 2011 |
| **Corporate Knights Magazine**  
Researcher, Special Projects  
| 2008 - 2010 |

| EDUCATION |

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Dialoguepartners.ca
City of Hamilton
C11-12-12

• Bachelor of Arts (First Class Honours), Geography, Economics and Environment, McGill University
• Certificate in Community Animation, Centre for Social Innovation

MEMBERSHIPS
• CivicAction Emerging Leaders Network

SPEECHES & PRESENTATIONS
• The Collaborative Activist: Engagement, Collaboration and Community Building in Advocacy Social Media Week, February 2012, Toronto, Ontario
Appendix D-Other Project Resources

City of Calgary, Our City. Our Budget. Our Future.
- DP’s Case Study 7
- Conversation Guide and Service Bills
- Presentation to Council with speaking notes

City of Edmonton, Edmonton City Centre Airport Lands Public Involvement Project
- DP’s Case Study 1
- Public Involvement Worksheets
- Picture Edmonton City Centre Airports Lands (Photovoice recording system)

Edmonton Public School Board, Sector Planning Review
- DP’s Case Study 2
- Phase 1 Discussion Guide for the Greater Hardisty and City Centre Areas
- Phase 2 Discussion Guide and Workbook for Central, South Central, West 1.
CITY OF CALGARY: OUR CITY. OUR BUDGET. OUR FUTURE.
A BUDGET ENGAGEMENT PROCESS

Dialogue Partners was retained to plan, design, implement and report on a comprehensive engagement process on City budget, services and priorities for the City of Calgary. The project was framed as a conversational journey for City Council to understand what Calgarians wanted, needed and valued in order to make budgetary decisions that truly reflected participant input.

The key question asked of participants was: How do we deliver City services that provide quality of life and value for money?

WHAT HAPPENED:
A three-phased public engagement process was used to:
1) Identify information participants needed and define meaningful involvement;
2) Understand what City Services were of most importance and why; and
3) Make spending choices and trade-offs.

This project was new and different. No municipality in Canada has approached budget decision-making in this way. Participants needed to understand how their choices and trade-offs for spending impacted services and to consider their personal needs, the needs of others and the well-being of the City now and in the future.

People showed up. An unprecedented number and diversity of people participated — more than 24,000 over 3 months.

We went to them. With 252 different engagement activities and multiple options for submitting feedback, people could participate the way they most preferred, reducing barriers.

The City listened. City Council minimally increased indicative tax rates to account for growth and inflation, reflecting the request of 58% of participants to maintain current budget levels. City Administration is reviewing the input received to develop business plans and draft budgets that reflect priorities.

Participants used this online budget tool, created by Dialogue Partners and Purple Forge, to create their own city budget.

"I rearranged my priorities and realized the city has to do lots more things than those I need."
- PARTICIPANT

THINGS WE LEARNED
ALONG THE WAY:
A poll wouldn't give you this. Establishing and building relationships, trust and credibility, and citizen capacity to participate were goals of the project that went far beyond gathering input to make decisions. Participants told us we succeeded.

Public engagement is about community building. We provided training, tools, materials and resources for people to host conversations, connect with others, talk about important issues, and identify their voice. A sense of ownership, responsibility and desire for continued participation and involvement was developed.

You need online tools AND face to face. The power of innovative technology had participants readily engaged in Facebook, Twitter, blogs and other social media and web tools. We confirmed that while these tools support the overall engagement process they cannot replace face-to-face interaction and dialogue on a complex and deliberative issue. It takes a careful balance of both to be successful.

"Thanks for helping to revolutionize the budget process through more proactive, inclusive citizen engagement, and sessions like today."
- PARTICIPANT
How would you spend your tax dollars? Make the choices that matter.

Here are the tools you will need to have your say about spending priorities for the City budget. In this package you will find:

1) My Budget Template
2) City “Service” Bills
3) “Leave As Is” Bills
4) “Eliminate” Bills
5) Additional comment cards
6) Evaluation Form

Our City. Our Budget. Our Future, is a conversation with citizens, City Council and City staff about priorities and values for the 2012-2014 budget.

How can you participate?

Budgets are a reflection of values, priorities and needs and a tool to deliver services that are important to citizens, Council and employees.

You can make your budget choices by following the instructions and submitting these materials in person or online using the budget allocator tool.

How does it work? What do you do?

Like your household budget, the City budget has major categories for spending. In your house these might be your mortgage, food, heat and transportation. At The City, these categories of spending start with City Departments.

STEP 1: Pick a City Department Information Station

- Review “what we do” in the Budget Kit Booklet and find out what services are provided by each of the different business units that make up that City Department.
- Think about the services that matter to you, your friends, neighbours, and colleagues.
- Talk with others at the Information Station about their ideas and priorities.
- Get your questions answered by a City resource person.

STEP 2: Decide how you would like to allocate the money

- You can increase or decrease the budget for each business unit by a little or a lot.
- You can leave it the “same” or you can eliminate it entirely.
- Please provide your comments about why you made those choices.
- Record your input on the City Service, Eliminate or Leave As Is bills as well as the My Budget Template.

NOTE: We’ve started with the 2011 net operating budget, which is not adjusted for inflation or other factors.

STEP 3: When you’ve made all your hard choices, “Cast your vote”

- Submit your materials about specific City services, City Departments and the City as a whole.
- Hand in the My Budget Template on your way out of the session.
- Drop off your City Service, Eliminate and Leave As Is bills at the appropriate Departmental Information Station.

This is YOUR opportunity to make the tough choices faced by City Council and Administration.

What trade-offs are you prepared to make?
What services do you value?
What are your suggestions about funding sources and use fees?
How do you use the materials?

**MY BUDGET TEMPLATE**

*These are my budget priorities and choices for The City*

- This is your recording form for comments, budget priorities and choices for the whole City.
- This is where you will record all of your suggestions and submit your input before you leave the session today.

**SERVICE BILLS**

*These are my suggestions for spending on specific City services*

**ON THE FRONT OF EACH SERVICE BILL:**
- Identify whether you choose to increase or decrease the budget for a City service or business unit.
- What amount are you suggesting?

**ON THE BACK OF EACH SERVICE BILL:**
- Indicate which service your choices relate to
- Tell us why you made these choices

SUBMIT your 'Service Bills' in the Budget Box at the Department Information Station and RECORD your choices on the MY BUDGET template.

If you leave the comment area blank, we will assume that you are applying the budget increase or decrease generically to the Department, and not to any specific City service.

**LEAVE AS IS BILLS**

*It's working well – don't change it*

- Use these bills in the same way as the Service Bills.
- Indicate which service you’re referring to and tell us your comments.

NOTE: These ballots indicate no change to the 2011 operating budget for that City service or Department.

SUBMIT your 'Leave As Is' bills in the Budget Box at the Department Information Station and RECORD your choices on the MY BUDGET template.

**ELIMINATION BILLS**

*The City shouldn't be delivering this service.*

Elimination bills are blank bills that you can use to eliminate City services that you believe the City should not be providing.

- Indicate which service and tell us your comments.

SUBMIT your 'Elimination' bills in the Budget Box at the Department Information Station and RECORD your choices on the MY BUDGET template.

NOTE: If an elimination bill is used, you will receive supplementary Service Bills to use in other areas. Visit any of the facilitators to make the trade.

**COMMENT CARDS**

*I have more to say!*

Not enough room to get your whole idea down?

- Use these additional cards to expand on your ideas.

SUBMIT your 'Comment Cards' in the Budget Box at the Department Information Station.

**EVALUATION**

We want your feedback on your experience today. Please complete the evaluation form and submit it before you leave.

If you have any additional questions, there are facilitators around the room to help you.

*Thank you for taking the time to participate.*

Feel free to walk around and discuss with other people, and have fun!
Phase 3

My Budget Template

This is your recording form for comments, budget priorities and choices for the whole City. Use this form to record your suggestions and submit your input before you leave the session today. You can increase or decrease the budget, leave it as it is now, or eliminate services entirely. Please provide your comments about why you made those choices and record your input.

1) CALGARY POLICE SERVICE

Total Budget for 2011: $294.7 M

Please indicate the business unit(s) and the specific service(s) that your choice relates to and how they might be affected:

Proposed Change:

☐ Increase
☐ Decrease
☐ Leave as is
☐ Eliminate

By how much (if applicable)?

$

2) COMMUNITY SERVICES AND PROTECTIVE SERVICES

Total Budget for 2011: $362 M

NOTE: This department also received $73M in Civic Partner Funding and a one-time pandemic funding of $1.2 M for CEMA

Please indicate the business unit(s) and the specific service(s) that your choice relates to and how they might be affected:

Proposed Change:

☐ Increase
☐ Decrease
☐ Leave as is
☐ Eliminate

By how much (if applicable)?

$
3) CORPORATE SERVICES
Total Budget for 2011: $144.7 M

Proposed Change:
☐ Increase
☐ Decrease
☐ Leave as is
☐ Eliminate

By how much (if applicable)?
$

4) CORPORATE ADMINISTRATION
Total Budget for 2011: $57.5 M

Proposed Change:
☐ Increase
☐ Decrease
☐ Leave as is
☐ Eliminate

By how much (if applicable)?
$

5) PLANNING, DEVELOPMENT
AND ASSESSMENT (PDA)
Total Budget for 2011: $100.54 M

Proposed Change:
☐ Increase
☐ Decrease
☐ Leave as is
☐ Eliminate

By how much (if applicable)?
$
6) TRANSPORTATION

Total Budget for 2011: $320.7 M

Proposed Change:

☐ Increase
☐ Decrease
☐ Leave as is
☐ Eliminate

By how much (if applicable)?

$ __________________________

7) UTILITIES AND ENVIRONMENTAL PROTECTION

Total Budget for 2011: $44.2 M

Note: This does not include Water and Water Services, as the operating budget for this department is self-supporting through utility rates

Proposed Change:

☐ Increase
☐ Decrease
☐ Leave as is
☐ Eliminate

By how much (if applicable)?

$ __________________________

Do you have any other comments you would like to share?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Tell us a little bit about yourself:

Home Postal Code: _______________________________________________________

Are you representing a member of an organization?  ☐ Yes  ☐ No

If yes, which one? _______________________________________________________

Are you a City employee?  ☐ Yes  ☐ No

If yes, what department do you work for? ___________________________________
Calgary Police Service

Proposed Change: □ Increase □ Decrease

By how much? $_________ 

Please indicate the business unit(s) and the specific service(s) that your choice relates to and how they might be affected:

□ Bureau of Community Policing
□ Bureau of Investigative Services
□ Bureau of Organizational Support
□ Office of the Chief

Corporate Services

Proposed Change: □ Increase □ Decrease

By how much? $_________ 

Please indicate the business unit(s) and the specific service(s) that your choice relates to and how they might be affected:

□ Customer Service & Communication (CS&C)
□ Human Resources (HR)
□ Information Technology (IT)
□ Corporate Properties & Buildings
□ Fleet Services
□ Infrastructure & Information Services
□ Office of Land Servicing & Housing

Calgary Police Service

Proposed Change: □ Increase □ Decrease

By how much? $_________ 

Please indicate the business unit(s) and the specific service(s) that your choice relates to and how they might be affected:

□ Bureau of Community Policing
□ Bureau of Investigative Services
□ Bureau of Organizational Support
□ Office of the Chief

Corporate Services

Proposed Change: □ Increase □ Decrease

By how much? $_________ 

Please indicate the business unit(s) and the specific service(s) that your choice relates to and how they might be affected:

□ Customer Service & Communication (CS&C)
□ Human Resources (HR)
□ Information Technology (IT)
□ Corporate Properties & Buildings
□ Fleet Services
□ Infrastructure & Information Services
□ Office of Land Servicing & Housing
Corporate Services

Proposed Change:  
☐ Increase  ☐ N/A  
☐ Decrease

By how much?

$ ____________

Please indicate the business unit(s) and the specific service(s) that your choice relates to and how they might be affected:

☐ Customer Service & Communication (CS&C)  
☐ Human Resources (HR)  
☐ Information Technology (IT)  
☐ Corporate Properties & Buildings  
☐ Fleet Services  
☐ Infrastructure & Information Services  
☐ Office of Land Servicing & Housing

Planning, Development & Assessment (PDA)

Proposed Change:  
☐ Increase  ☐ N/A  
☐ Decrease

By how much?

$ ____________

Please indicate the business unit(s) and the specific service(s) that your choice relates to and how they might be affected:

☐ Land Use Planning & Policy (LUPP)  
☐ Development & Building Approvals (DBA)  
☐ Assessment

-- over --
SERVICE BILL

Transportation

Proposed Change:  Or

☐ Increase  ☐ N/A
☐ Decrease

By how much?

$

Please indicate the business unit(s) and the specific service(s) that your choice relates to and how they might be affected:

☐ Transportation Planning and Department-wide Services
☐ Calgary Transit
☐ Transportation Infrastructure
☐ Roads

-- over --

SERVICE BILL

Corporate Administration

Proposed Change:  Or

☐ Increase  ☐ N/A
☐ Decrease

By how much?

$

Please indicate the business unit(s) and the specific service(s) that your choice relates to and how they might be affected:

☐ Finance and Supply (F&S)
☐ City Manager's Office (CMO)
☐ Law
☐ City Clerks Office

-- over --

SERVICE BILL

Transportation

Proposed Change:  Or

☐ Increase  ☐ N/A
☐ Decrease

By how much?

$

Please indicate the business unit(s) and the specific service(s) that your choice relates to and how they might be affected:

☐ Transportation Planning and Department-wide Services
☐ Calgary Transit
☐ Transportation Infrastructure
☐ Roads

-- over --

SERVICE BILL

Corporate Administration

Proposed Change:  Or

☐ Increase  ☐ N/A
☐ Decrease

By how much?

$

Please indicate the business unit(s) and the specific service(s) that your choice relates to and how they might be affected:

☐ Finance and Supply (F&S)
☐ City Manager's Office (CMO)
☐ Law
☐ City Clerks Office

-- over --
Utilities & Environmental Protection

Proposed Change: Or

☐ Increase  ☐ N/A
☐ Decrease

By how much?

$ __________

Please indicate the business unit(s) and the specific service(s) that your choice relates to and how they might be affected:

☐ Environmental & Safety Management
☐ Waste & Recycling Services
☐ Water Resources/Water Services

Community Services and Protective Services

Proposed Change: Or

☐ Increase  ☐ N/A
☐ Decrease

By how much?

$ __________

Please indicate the business unit(s) and the specific service(s) that your choice relates to and how they might be affected:

☐ Animal and Bylaw Services
☐ Community and Neighbourhood Services
☐ Calgary Fire Department
☐ Parks
☐ Public Safety Communications
☐ Calgary Emergency Management Agency
☐ Recreation

--- OVER ---
SERVICE BILL

Community Services and Protective Services

Proposed Change: Or

☐ Increase ☐ Decrease ☐ N/A

By how much?

$ ____________________________

Please indicate the business unit(s) and the specific service(s) that your choice relates to and how they might be affected:

☐ Animal and Bylaw Services
☐ Community and Neighbourhood Services
☐ Calgary Fire Department
☐ Parks
☐ Public Safety Communications
☐ Calgary Emergency Management Agency
☐ Recreation

ADDITIONAL COMMENTS

I have more to say!

Please indicate the business unit(s) and the specific service(s) that your choice relates to:

________________________________________

________________________________________

________________________________________

________________________________________

-- over --

ADDITIOAL COMMENTS

I have more to say!

Please indicate the business unit(s) and the specific service(s) that your choice relates to:

________________________________________

________________________________________

________________________________________

________________________________________

-- over --
Please indicate the business unit(s) and the specific service(s) that your choice relates to:

________________________________________

________________________________________

________________________________________

________________________________________

-- over --

Please indicate the business unit(s) and the specific service(s) that your choice relates to:

________________________________________

________________________________________

________________________________________

________________________________________

-- over --
ADDITIONAL COMMENTS

I have more to say!

Please indicate the business unit(s) and the specific service(s) that your choice relates to:

________________________________________
________________________________________
________________________________________
________________________________________
________________________________________

-- over --

ELIMINATE BILL

The City shouldn't be delivering this service

Please indicate the business unit(s) and the specific service(s) that your choice relates to:

________________________________________
________________________________________
________________________________________
________________________________________
________________________________________

-- over --

ADDITIONAL COMMENTS

I have more to say!

Please indicate the business unit(s) and the specific service(s) that your choice relates to:

________________________________________
________________________________________
________________________________________
________________________________________
________________________________________

-- over --

SERVICE BILL

Calgary Police Service

Proposed Change: Or

☐ Increase  ☐ Decrease  ☐ N/A  ☐ N/A

By how much?

$__________________________

Please indicate the business unit(s) and the specific service(s) that your choice relates to and how they might be affected:

☐ Bureau of Community Policing
☐ Bureau of Investigative Services
☐ Bureau of Organizational Support
☐ Office of the Chief
ELIMINATE BILL

The City shouldn't be delivering this service

Please indicate the business unit(s) and the specific service(s) that your choice relates to:

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Public Engagement Process and Results

June 28, 2011

Presentation delivered to City Council on June 28, 2011 by Stephani Roy McCallum of Dialogue Partners
Thank you for the opportunity to present the results of the engagement process. I'd like to start by offering thanks and appreciation to all of the participants who took time, energy and effort to participate and offer their views and input in the process. By making a commitment to provide input in the budget engagement process they took time away from something else that was important to them, demonstrating a commitment and care for their City. We hope this presentation will allow us to honour their voices and input. I'm going to provide a high level overview, highlights and key points related to the process, participants and the results of what we heard.
We started planning the engagement process on the foundation of The City's Engage policy, with its five cornerstones of accountability, transparency, inclusion, responsiveness and commitment. This policy is familiar to members of Council, and guides the City's engagement activities with citizens and stakeholders. Of critical importance to participants is the link between their input and final decisions, and I'll come back to this issue later in my presentation.
Building on the City's Engage policy, we then looked to international best practices of the International Association for Public Participation (IAP2). IAP2 identifies three foundations that must be present in order to ensure meaningful engagement:

- **Goal Focused** – where we identified the role of the public, the purpose of the project, and what we wanted to achieve. This is articulated in the “Our City” component of the project title, where we focus on reciprocal responsibility, community and intended result.

- **Decision Oriented** – where we focus on the scope of the issue under discussion and the focus of the conversation, identifying what is on the table / off the table for input. This is articulated in the “Our Budget” component of the project title, where we initiated a conversation about City services and the budget associated with those services.

- **Values Based** – where we talk to people about what matters to them, what is really important, and about the future they want to be a part of. This is articulated in the “Our Future” component of the project title, where we link to future action and direction.

This gives you the “frame” for the conversation – Our City. Our Budget. Our Future.
The engagement process was built on an integrated and phased approach where we first gathered input on meaningful process and information needs, then talked about valued and priority City services and finally, focused on spending priorities related to those values.

The question we asked participants was “How do we deliver City services that provide quality of life and value for money?” The question was NOT “What tax rate would you like to have?” That question would result in an adversarial discussion, with little relation to what was important or of value to participants beyond what they are willing to pay. That question would also create unrealistic expectations that the input would result in the final tax rate, and would not provide opportunities to raise awareness or understanding, or result in informed participation. That question would result in participation from a positions versus a values based perspective.

The commitment that was made to participants throughout the engagement process related to their role in the process. We did NOT facilitate a conversation to create a citizen’s budget, nor was the process designed to create agreement or consensus on a budget. The expectation related to a process like that would be that Council and Administration would then implement what citizens came up with. That was not the commitment made to participants. We committed that Council and Administration would understand and consider their views, suggestions and priorities in making decisions and tell them how their input affected those decisions.
The engagement process itself had eight specific goals, that guided the project, and were then used the measure the process. These eight goals were approved by Council in January. They included an emphasis on:

- Values based engagement that would be used to inform decision making
- Multiple opportunities for constructive dialogue
- Transparent, accountable and inclusive process focused on building trust, credibility and relationships
- Raising awareness and understanding of City services and the budget
- Building capacity for constructive conversation
- Building relationships and partnerships and an increased feeling of involvement
- Providing participants with the information they need to participate
- Making a link to the goals and strategies of Imagine Calgary

If this had been a simple, easy to solve issue, Council would not have needed to engage citizens and staff in the conversation. The process brought an increased recognition by participants that there are no easy or simple answers to the challenges and opportunities posed by the conversation. They also understood that the commitment that was being made to them was to reflect
There were a total of 252 events/activities/opportunities to participate in the engagement process. Of these 252 events, Dialogue Partners hosted or facilitated 122 of them. A further 130 events were hosted or facilitated by participants, organizations or City staff. We’ve provided comparitors in the report for other engagement processes on budget related issues.
The report outlines a number of different pieces of information about participants and participation rates. It also notes some limitations on the reporting of these participation rates including that we relied on participants to report on demographic information in good faith, and to self identify their organizational affiliation, age, education, postal code and other factors. The engagement process was not intended to be market research or to be statistically valid – which would provide a snapshot of opinion at a moment in time, but not serve to achieve many of the other engagement goals related to trust, credibility, capacity building, partnerships or awareness raising.

We’ve been asked to clarify the participation numbers, so some additional information related to the participation rates includes:

There were 24,000+ participants in the process. This includes participants who provided substantive content, input, submissions or views. It also includes 6,491 participants who chose to view Budget TV submissions, based on their active choice to seek out this input we included them in the participant rate count. Without the Budget TV views, there are 18,091 participants who commented or submitted substantive input.

Of those 18,091 participants, 11,669 were involved in activities or events where we provided opportunities for them to self identify demographic information (age, postal code, education, gender, affiliation etc). These represent the maximum potential of participants who could have answered demographic questions. (other opportunities for
In Phase 1 of the process we asked participants about their past experience in engagement processes with the City. We asked them to identify what would make engagement meaningful to them and what information they would need to participate in a conversation on the budget. While I don’t cover that input in this presentation, there is a wealth of detail and suggestion in the report on how the City could change or improve its practice in this area.

In Phase 2 of the process we asked participants to tell us about the services they value, that make a difference in their lives, and that are part of the City they envision. Page 76 of the report provides an overview of the weighted ranking of priority services identified by community and by City staff. For both City staff and community, Police, Transit and Fire rank as the top three priority services.

There are differences based on age, geography and other factors. For example, participants who are under the age of 34 placed less value on Police, and more value on Utilities and Environmental Protection, Planning and Transit. Participants aged 35-54 ranked Utilities and Environmental Protection lowest and Police highest. Participants over 55 rated Community Services and Protective Services highest and Corporate Administration lowest.

Most important in the ranking of City services are the reasons why participants place value and priority on specific services.
Participants spoke to the value they placed on City services, and the reasons why certain services were important. We have grouped these reasons into themes that align with the Sustainability Indicators.

For example, 45% of participants rated services that could be characterized as "Community Well-being" as a priority for them, including such services as Public Safety (29%), Creative, Active Communities (11%), and Connected and Supported communities (5%). 27% felt services related to smart growth and mobility were a priority and 18% placed priority on services that contributed to a sustainable environment.
All City Departments received suggestions for improvements, enhancement or changes to City services. Specific suggestions have been grouped into themes in the report, with focus on improved delivery, and changes to services that result in more responsive services. Themes reflect a similar perspective as the values and choices related to spending priorities and future direction.
Participants offered many comments that speak directly to how the City operates and is governed. These themes from comments impact the City, the community, spending priorities and City services, and apply across the organization rather than in just one department.

- Combine similar services or decentralize services to meet specific community needs
- Measure performance and be accountable
- Communicate more and authentically with citizens and within the organization
- Focus on long-term planning versus short term decisions
Additional over-arching themes relate to:

- Controlling spending and fiscal responsibility including outsourcing, reducing management and getting rid of internal charge backs
- Transforming organizational culture through creativity, flexibility, innovation
- Empower communities and work with communities to empower them to deliver programs or services
- Engage more in a meaningful, consistent and coordinated way
In Phase 3 of the project, participants were asked to identify how they would allocate the spending, based on their priorities, and why they made those choices.

Overall, participants were clear that they wanted to see a re-focus and a re-prioritization of where the budget is allocated. Looking at opportunities to outsource or contract out services, to coordinate across the corporation and with other organizations, to do more with less, become more efficient and/or consider implementing or increasing user fees for those who can pay for services to support those who cannot.
Sometimes the reasons participants offered for why they made choices to increase spending in a certain area, is the same or similar reason to why another participant made a choice to decrease spending in an area.

For example, some participants allocated spending to a service because they wanted to see a particular problem fixed. Others chose to decrease spending to that service because of those same items they viewed as inefficient or not meeting expected performance.
For each Department, and City services, the report outlines the reasons why participants made choices related to spending, and the values that underlie those choices and trade-offs.
Overall themes emerged from the comments related to spending priorities. These include:

- Look at outsourcing and contracting out of services in order to save money, improve performance and reduce cost
- Deliver services and programs with the community, rather than always requiring the City to lead service or program delivery, and in some cases communities of interest or geographic communities might be better able to deliver services
- Adjust some priorities and consider opportunities to increase spending for some services, and in turn to decrease spending for certain services based on participant priorities
- Demonstrate value for money and cost effective operations
- Coordinate similar or related services in the City to reduce duplication
- Improve efficiency and reduce “waste”

Participants were clear that the same spending, in the same way, on the same services, was not acceptable.
<table>
<thead>
<tr>
<th>Overall choices for spending priorities</th>
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<tbody>
<tr>
<td>Decrease the budget = 26%</td>
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<tr>
<td>Increase the budget = 15%</td>
</tr>
<tr>
<td>Eliminate = 1%</td>
</tr>
<tr>
<td>Leave the budget “as is” = 58%</td>
</tr>
</tbody>
</table>

In Phase 3, 58% of participants indicated that overall spending for the operating budget should not increase, and should remain as is.

15% chose to make an increase in overall spending for the budget.

26% chose to decrease the overall spending in the budget.

Almost every single participant made a change in some way to the spending priorities, where they made choices to increase spending in some areas, and therefore to make a trade-off by decreasing spending in some area. The message that the status quo was not desired was made clear by participants.
At the start of the engagement process we identified a number of measures of success, rated and commented on by participants, that we would use to measure the success of the process at the end of the engagement, and over the course of the conversation.

The report outlines the views and input of participants related to the performance indicators that were set at the beginning of the process. Overall, there was a very high level of satisfaction with the process and a measurable increase in understanding and awareness.

There was one indicator we are unable to measure, but that participants rated as very significant and important to them. That measure relates to commitment and accountability, and measuring the link between participant input and final decisions. We encourage Council to have this evaluation conducted when decisions are made at the end of November.
We have identified a number of lessons learned over the course of the project that we offer for consideration in future engagement processes.
I'd like to express my gratitude again for all the participants who provided input and time into this important conversation. I'd be pleased to answer any questions you may have.
CITY OF EDMONTON
EDMONTON CITY CENTRE AIRPORT LANDS
PUBLIC INVOLVEMENT PROJECT

Dialogue Partners was retained to plan, design and implement a comprehensive public involvement project for the City of Edmonton. The project included development and implementation of an inclusive plan for the public involvement and communications for the Edmonton City Centre Airport lands – to explore the possibilities and challenges of land use. We engaged a wide cross section of the community in a values-based conversation on a highly emotional, controversial issue, in order to identify options for the future.

WHAT HAPPENED: The project included: a detailed conflict assessment with more than 125 stakeholder interviews; a one-day Community Conversation with 150 participants; a 25 member Citizen Advisory Group that met monthly and provided input on the public involvement process; an online engagement process including Discussion Forums; community capacity building workshops to train citizens to host/facilitate their own conversations; a photo-voice project to engage residents in visually reflecting their thoughts on the possibilities and challenges of existing and future land use; a one-day deliberative forum to refine and develop options for presentation to City Council; and three open houses with embedded key pad polling, to gather final comment on options going forward to Council. By the end of the project, more than 6,500 participants were involved.

THINGS WE LEARNED: High emotion and a long history of polarized views, well-funded stakeholders were evident. Dialogue Partners used a step-by-step methodology, capacity building with staff and decision makers and stakeholders, and a values-based process to address these issues in the engagement process. After a meaningful conversation, the formal hearing process with 5 minutes at the microphone was scheduled as part of City Council decision-making. This resulted in a return to polarized views on the part of many stakeholders. Ongoing discussion and relationship building between elected officials, senior staff and stakeholders post decision-making would have helped long-term. Making sure that all partners – including the Edmonton Airport Authority – were actively participating in the process would have helped ease concerns about transparency and information sharing.

Our client at the City of Edmonton rated our services as “exceeding expectations” in all categories of the contract, including deliverables, project management, and value for money, noting that Dialogue Partners handled high emotion and conflict in a professional, engaging way.
<table>
<thead>
<tr>
<th>APPROACH 1 - OPERATIONAL AIRPORT</th>
<th>APPROACH 2 - AVIATION &amp; BUSINESS CENTRE OF EXCELLENCE</th>
<th>APPROACH 3 - SMART GROWTH COMMUNITY</th>
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</thead>
<tbody>
<tr>
<td>Keep the airport and maximizing service and/or improving service and/or infrastructure</td>
<td>Inter-modal transportation hub with modified airport and/or no airport</td>
<td>Develop a sustainable, smart growth community with mixed, high density land uses</td>
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Map of Possibilities and Ideas
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<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
<th>Other</th>
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<tr>
<td>What does the picture mean to you?</td>
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<tr>
<td>A change in future land use and should be addressed</td>
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<td>Any opportunity for future land use at ECMA that should be considered</td>
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<td>Your answer:</td>
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<tr>
<td>The picture was taken at (please check if possible, name of community street address):</td>
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<td>This is a picture of: (please describe the objects of interest in your picture):</td>
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<td>Photo Description (number of the name):</td>
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Your views about the future of the airport lands. Your photos may be used as part of a report presented to City Council in June.

Picture Submission City Centre Airport Lands: Photo Record
EDMONTON PUBLIC SCHOOL BOARD
SECTOR PLANNING REVIEW

Dialogue Partners was retained by Edmonton Public Schools to engage the community and stakeholders in a comprehensive process that would explore how to make the best possible use of available resources so that all students have access to vibrant schools and a range of quality programs. Declining enrollment, surplus school space and insufficient student-based funding were contributing factors. The goal was to engage the community in a values-based dialogue that weighed community priorities with the financial and infrastructure realities and identify a path for the future.

WHAT HAPPENED. We worked with the public, stakeholders and staff in a multi-phased values-based approach. Part 1 of the project focused on two City Centre areas with 11 schools under review, while Part 2 of the project took place in 3 larger sectors with 70 schools under review. For both parts of the project, we conducted a detailed conflict assessment and used the input to develop the public engagement plans.

In Part I, Dialogue Partners conducted outreach to over 6000+ participants using 16 distinct communication tools, hosted 21 different engagement activities or events, and gathered input from 600+ participants using workshops, deliberative workbooks, open space process and online consultation. For every event, we produced a “What was Said” report, and in most cases, an evaluation report. Input gathered has resulted in useful information for decision-making.

THINGS WE LEARNED
Along the way: High emotion, conflict and a wide diversity of viewpoints were present. We used a step-by-step methodology, capacity building with the organization and stakeholders, and a values-based process to address these issues in the engagement process. A lack of trust and a need to demonstrate commitments and transparency were fundamental to meaningful outcomes. Supporting participant understanding of the complexity and challenges of the issues and viewpoints was important to developing options that were sustainable. We had to work hard to help all participants, including elected officials, understand that “don’t close schools” is a simple solution that wouldn’t address the complexity of values or challenges present in the discussion.

In Part 2, Dialogue Partners conducted Open Space Forums, deliberative workbooks, online discussion, YOUTH Talk sessions in schools and workshops. Part 2 concludes in late 2010, and we’ll update this case study on the results of that part of the project then.

COMMITTEE CAPACITY BUILDING
Dialogue Partners was engaged by Edmonton Public Schools to engage the community and stakeholders in a comprehensive consultation. The project included workshops and capacity building training so participants could host their own conversations on the issue. We also held workshops and training with staff and the community on meaningful public engagement and values-based consultation.
Edmonton Public Schools | SECTOR PLANNING
Greater Hardisty and City Centre areas

COME TO THE CONVERSATION
Discussion Guide & Workbook

EDMONTON PUBLIC SCHOOLS

DIALOGUE PARTNERS
YOU ARE INVITED to join the conversation and share your thoughts and opinions about Sector Planning in Edmonton Public Schools. The District is committed to schools as centres of communities, and recognizes that school space is a factor in a complete and vibrant community.

An external consulting firm, Dialogue Partners Inc., has been retained to develop and implement a public engagement program to identify strategies to address space needs and requirements.

The Greater Hardisty and City Centre Areas will be the first to take part in the public engagement process, beginning in mid-September and continuing through to December 2009. Specifically, the public engagement process is committed to:

- Raising awareness and sharing information on how space is used
- Engaging the community in discussions on space requirements and configurations
- Involving the community in discussions on using closed space in the best interests of the community

From October through December 2009, conversations are planned to discuss the possibilities and challenges of school space as an important part of a complete and vibrant community. There are several ways to get involved and share your thoughts and opinions on this important topic:

- Using this workbook as a conversation starter, you can learn about the issues and share your thoughts, ideas and suggestions.
- You can attend a Community Forum to talk about what is important to you and talk with others about the principles for how, where and when school space is used in the community.
- You can participate in a workshop that will build on the input received from the workbook and forums, and focus on how to use school space in the local community.
- You can talk to others by joining an online forum discussion.
- You can respond to a questionnaire, online or in hard copy, and tell us your comments and thoughts.

More information is available about all of these options on the project website: http://sectorreview.bangthetable.com

Or by calling the information line at: 1.866.269.1276

Or by sending us an email at: info@dialoguepartners.ca
SOME BACKGROUND:
Edmonton Public School Board's Ten-Year Facilities Plan (2009-2018) outlines the need to implement a comprehensive, all-sector approach to managing excess school space across the entire district. The Board recognizes that a meaningful public engagement process will provide an opportunity for everyone to better understand the complexity of the issues and that input will contribute significantly to the decisions to be made.

EDMONTON PUBLIC SCHOOLS is a district with 196 schools and 79,894 students. Even though some areas of the city are growing very quickly, enrolment in schools in some of the more mature areas is declining. The result is a number of schools that have unoccupied space. By 2010 there will be than 30,000 surplus spaces in the District.

School maintenance, including heat, power and renovating older facilities is getting more costly. Provincial government funding for maintenance is tied to the number of students a district has, rather than the amount of space it maintains. As a result, funds are not available for the maintenance of excess space.

This provides a major challenge to Edmonton Public Schools. The District is committed to ensuring all students are able to access a quality school close to where they live, while at the same time ensure sound management of school space where student populations are stable over the long term.

Out of these challenges comes an opportunity for parents, community members, and other interested parties to be involved in the process to recommend strategies to manage District space. All sectors in the district will be reviewed with the Greater Hardisty and City Centre Education Partnership the first to be analyzed. Edmonton Public Schools will use a Sector Planning Approach to develop the recommendations that will go to the Board of Trustees for decision.
SECTOR PLANNING APPROACH

WHAT EXACTLY DOES THIS MEAN?

It means that an extensive review must take place in all areas of the city to ensure the District has a clear picture of the current situation for all schools and some idea of what the space requirements will be for the future.

This Sector Planning approach is grounded on six planning principles:

1. Equitable access to quality learning environments and choice of programs
2. Creative re-use of surplus space
3. Efficient use of school space in sectors and retention of schools in aging neighbourhoods
4. Accommodation and program needs met within sectors
5. Capital investment contingent upon confirmation of long-term viability
6. Proactive approach to environmental awareness and stewardship

QUESTION 1

We want to use these principles to guide this conversation where we explore the possibilities and challenges of school space as part of a complete and vibrant community.

HOW WELL DO THESE PRINCIPLES REFLECT WHAT IS IMPORTANT TO YOU? PLEASE SHARE YOUR SUGGESTIONS, IDEAS OR THOUGHTS ON THE MOST IMPORTANT THINGS YOU THINK SHOULD GUIDE THIS CONVERSATION?
Accommodation and program needs met within sectors

The District will ensure that we have sufficient schools and programs in each sector to accommodate student demand, eliminating the need for students to travel great distances to access programs.

Capital investment contingent upon confirmation of long-term viability

The investment of funds for upgrades will focus on projects at schools where the long-term viability of programming and student enrolment has been confirmed. The District will however, continue to responsibly maintain existing schools in order to ensure that all matters of life, health and safety are fully addressed.

Proactive approach to environmental awareness and stewardship

The District will consider environmentally responsible approaches to distribution of space and resources within the District. The District will promote a proactive strategy to environmental awareness and stewardship of buildings and land.
Once we've established the principles we'll rely on to guide the conversation, we know there are some basic facts that need to be addressed. In order to have this conversation about school space in the context of the larger community, each year the enrolment numbers and programs at elementary and junior high levels need to be analyzed.

With those basic facts in mind, we need to consider:

1. How much space is required to meet current and future instructional needs?
2. How much space is available to share with educational partners, the community or other strategic district partners?
3. How much space can be disposed of to meet other community purposes?

QUESTION 2

WITH THIS INFORMATION IN MIND, PLEASE SHARE YOUR THOUGHTS AND IDEAS ABOUT SPACE ALLOCATION AND CONFIGURATION. HOW MIGHT SCHOOL SPACE BE USED NOW AND IN THE FUTURE?
EXCESS SCHOOL SPACE

HOW DO WE USE IT?

In some cases the data will show that consistent low enrolments, coupled with a forecast for continued low enrolments will lead the District to recommend a school closure, and a school building will be recommended for other uses in the community.

An important element of the Sector Planning Approach is to identify any and all opportunities to partner with other organizations to use school space in ways that support the community, and continue to allow the District to meet its mandate and responsibilities.

In the past several years, a number of schools with excess space were successfully transitioned to other users and other uses. For example:

- Bellevue School has served for 4+ years as the site of Distinctive Education and Counselling Services Association primarily for new Canadian and aboriginal women.

- Canora School was used as the site for the White Hall Day Care for more than 15 years. The building was then sold to the Canadian Turkish Society for a cultural centre.

In these cases Edmonton Public Schools strives to ensure the school continues to serve as a centre of the community by providing a facility for services that the community needs.
QUESTION 3

WHAT SUGGESTIONS CAN YOU OFFER ON WHAT CRITERIA CAN BE USED TO CONSIDER HOW SCHOOL SPACE IS USED FOR THE BENEFIT OF THE COMMUNITY? WHAT ARE IMPORTANT CONSIDERATIONS FOR Partner OPPORTUNITIES IN THE FUTURE?

COMMENTS

PLEASE USE THIS SPACE TO MAKE ANY ADDITIONAL COMMENTS OR TO SHARE YOUR THOUGHTS ON WHAT ELSE NEEDS TO BE CONSIDERED.
WE’RE INTERESTED IN YOU

Please tell us a little bit about yourself:
What area of the city do you live in?

Did you complete this workbook alone or did you work with a group host?

If you worked with a host, please provide his or her name:

Do you want to be added to our contact list? If so, please provide us with the following information:

Name: __________________________
Address: ________________________
Email: __________________________
Phone Number: __________________
School(s): ______________________
If you have indicated that you would like to be included on the contact list, you may be contacted by phone, letter or e-mail for the intended purpose. Personal information is collected for the purpose of supporting the development of a public engagement program and providing input into the decision making processes in regards to sector planning. All personal information is collected in accordance with the Freedom of Information and Protection of Privacy Act, the Alberta School Act, and board policies of Edmonton.

More information is available on the project website: 
http://sectorreview.bangthetable.com

Or by calling the information line at:
1.866.269.1276

Or by sending us an email at:
info@dialoguepartners.ca
Making the best possible use of available resources so that all students have access to vibrant schools and quality programs

COME TO THE CONVERSATION

Edmonton Public Schools | DISCUSSION GUIDE & WORKBOOK

Please select your sector:   □ Central   □ South Central   □ West 1

WHAT IS SECTOR PLANNING?
Sector planning is about making the best possible use of available resources so that all students have access to vibrant schools and a range of quality programs in their sectors.

- Sector review might mean change.
- Possible results include no change, combining schools together, reorganization or relocation of programs or closure of some schools.
- Sectors are geographic areas of the City. The three sectors under review are Central, South Central and West 1.

SHARE YOUR THOUGHTS
You are invited to join the conversation and share your ideas about Sector Planning Review in Edmonton Public Schools. The District recognizes that school space plays an important role in our communities. By maximizing space and carefully managing resources, the quality of education in Edmonton schools will be at its best and children will reap the rewards.

HOW YOU CAN GET INVOLVED

- Use this workbook to learn about the facts, and share your thoughts, ideas, and suggestions.
- Host a group conversation with friends, colleagues, and family using this workbook.
- In May and June, attend a Community Forum. Talk with others about what is important to you about your community and use of school space. Share your ideas, issues and concerns that should be considered in sector planning.
- In September and October, attend a workshop where you will consider the facts, data and community input and offer what YOU propose as an option going forward.
- Talk with others by joining an online discussion forum.

For more information on Sector Planning Review and how you can become involved, please contact Dialogue Partners Inc.
TOLL FREE 1.866.269.1276  E MAIL info@dialoguepartners.ca
PROJECT WEBSITE www.sectorreview2010.com

EDMONTON PUBLIC SCHOOLS

[Image]
CHANGE IS COMING.
BE A PART OF IT.

This workbook has been created so that as many people as possible can make their views known. This is an opportunity to take part in the conversation. You can fill out the workbook on your own, or with a group (see back cover for more details). It’s easy. Simply review the information that has been provided on each page and answer the questions. If you are going to get a group together, discuss each of the questions and send us the information you collected from all the participants. We look forward to hearing what you have to say.

TELL US ABOUT YOURSELF

Do you have a child or children in school? Y / N
If so, which school(s)?

If you have children:
☐ Do your children attend their designated neighbourhood school, or a school outside of the neighbourhood boundaries?

☐ Are they involved in an alternative program? Y / N If so, which one?

What neighbourhood do you live in?

Are you a completing this workbook as a member of a community organization? If so, which one?

Outside of Edmonton Public School programs, do you participate in any community programs or activities at local schools? Y / N Please provide 1 or 2 examples.

Age
☐ 7-12  ☐ 13-18  ☐ 18-30  ☐ 31-50  ☐ 50+
I am a:
☐ Student  ☐ Parent  ☐ Community Member  ☐ School Staff  ☐ Other? ___________

This workbook was completed:
☐ On your own  ☐ With a group
If so, how many took part? ___________
CHALLENGES AND OPPORTUNITIES

WHAT IS OUR GOAL? To make the best possible use of available resources so that all students have access to vibrant schools and a range of quality programs in their sectors.

Edmonton Public School's Ten-Year Facilities Plan (2009-2018) outlines the need to implement a comprehensive, all-sector approach to managing excess school space across the entire district. The District recognizes that a meaningful public engagement process will provide an opportunity for everyone to better understand the issues, and the input gathered will contribute significantly to the decisions that will be made.

Edmonton Public Schools is a district with 196 schools and 79,894 students. Even though some areas of the city are growing rapidly, enrolment in schools in some of the more mature areas is declining. The result is a number of schools that have a significant amount of unoccupied space.

There are both challenges and opportunities in this process:

- Provincial funding for teaching is provided per student, and this creates challenges when enrolment is declining.
- Provincial funding for maintenance is tied to the number of students a district has, rather than the amount of space it maintains.
- In the event of a closure, school buildings continue to benefit the community by offering a space for services such as churches, cultural centres, or community programs.

QUESTION 1:

What challenges and opportunities do you see? How can we maximize resources, offer a range of programming, and consider community needs?
PLANNING PRINCIPLES EXPANDED

Planning supports teaching and learning by providing all students with access to quality learning environments and program choices.

1. All children are able to attend a good school that offers a variety of quality programs
   Students at all grade levels are entitled to equal access to high quality, modern facilities and a balanced range of regular, alternative and special programs regardless of where they live in the city.

2. If there is extra space in schools, it is used in creative and valuable ways
   School space that is not needed for instruction still has value to the community. The District will continue to seek out tenants and partners for the use of surplus school space that support the community in areas of child and family services, and the not-for-profit sector. Examples include early learning partners such as Head Start groups, immigrant services, child care providers, etc.

QUESTION 2:

Tell us what is really important to you about your schools and your community. How can we provide quality programming and maximize available resources while recognizing community needs?

We’ve come up with six ideas to start with:

1. All children are able to attend a good school that offers a variety of quality programs
2. If there is extra space in schools, it is used in creative and valuable ways
3. Enough schools exist in older neighbourhoods to meet student needs
4. Each Sector of the District can meet student needs
5. If the District is sure that the school will continue to have enough students in the future, they will apply for funds to renovate or change school buildings
6. We will be environmentally responsible in everything we do

How well do these ideas reflect what you think is important? What else do you think is important?
Planning Principles Expanded continued

3. An adequate amount of schools exist in older neighbourhoods to meet student needs

By reducing the amount of unused and unneeded space, the District will continue to work toward retaining schools in mature neighbourhoods.

4. Each sector of the District can meet student needs

The District will ensure that there are sufficient schools and programs in each sector to accommodate student demand. This will eliminate the need for students to travel great distances to access programs.

5. If the District is sure that the school will continue to have enough students in the future, it will apply for funds to renovate or change school buildings.

Upgrades will focus on schools where the long-term viability of programming and student enrolment has been confirmed. The District will continue to responsibly maintain existing schools in order to ensure that all matters of life, health and safety are fully addressed.

6. The District will be environmentally responsible in everything we do

The District will consider environmentally responsible approaches to the distribution of space and resources. The District will promote a proactive strategy to environmental awareness and stewardship of buildings and land.

**QUESTION 3:**

Please read the planning principles outlined here, as well as those on page 4 and share your thoughts and ideas about how we might use school space in your sector. What specific ideas do you have about how to meet student needs for quality education while ensuring effective use of space?
SOMETHING ELSE TO THINK ABOUT

It is important to think about how many children attend a school, and how many children could attend that school for an Edmonton Public Schools program. How many more children would be needed in order to fill up the extra space? We also need to think about your community in the future.

Edmonton Sector Data

Note: This data includes only the schools from each sector that are part of this Sector Review Process. Not all schools in each sector are included (for example, some have already been reviewed and some are unique like the Alberta School for the Deaf).

![Student space graph]

**ACU – (Area, Capacity, and Utilization). The ACU capacity looks at the square footage of the building and is based on safety codes for the maximum number of people a building can hold. Based on March 2009 report.

*ACOL – Student space based on a count of classrooms and the number of students that can be accommodated in them. This is based on the recommendations of the Alberta Commission on Learning.

District of Choice

Edmonton Public Schools offers families a choice. Students are not limited to schools within their own sectors and parents can choose to have their children attend any school in the city. The following chart displays how many children are living in each sector and attending school there. Children from outside a neighbourhood may end up attending a school in your community.

<table>
<thead>
<tr>
<th>Students living in Attendance Area*</th>
<th>WEST 1</th>
<th>CENTRAL</th>
<th>SOUTH CENTRAL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>5733</td>
<td>6601</td>
<td>5541</td>
</tr>
<tr>
<td>Students attending their designated area school</td>
<td>2524</td>
<td>2624</td>
<td>2280</td>
</tr>
<tr>
<td>Students attending a school outside their designated area</td>
<td>3209</td>
<td>3977</td>
<td>3261</td>
</tr>
</tbody>
</table>

*Schools with alternative programming do not have an "attendance area" and are not included in this figure.

Trends impacting future enrolment

Source: Censuses - Statistics Canada, City of Edmonton

Number of children, age 0-4, residing in each sector

Note: This information is the most accurate data related to potential number of children who will attend school in the future. There are different census numbers available. We will be sourcing these documents and posting them on the website as additional information.

Many people want to know how many children ages 0-4, reside in each sector. These numbers help us to estimate the number of students that will attend Edmonton Public Schools in the years to come.

On average, 75% of these families will choose an Edmonton Public School. Of these, 50% will choose their attendance area school. So, that means roughly 38% of children listed in the census families will end up choosing their designated school.
SCHOOL ATTENDANCE AREAS
Students Residing in WEST 1

**Elementary students**

- Athlone (Industrial Area) - 1
- Winterburn (Industrial Area) - 3
- Youngstown (Industrial Area) - 224
- Mayfield - 143
- Brightview - 217
- Sherwood - 137
- Glendale - 160
- Meadowlark - 111
- James Gibbons - 106
- Lynnwood - 149
- Patricia Heights - 223
- Coronation - 169
- Glenora - 97
- Crestwood - 123
- Glenora - 48
- Parkview - 155
- Laurier Heights - 140

**Junior High students**

- Rosslyn (Industrial Area) - 0
- Winterburn (Industrial Area) - 0
- Britannia - 257
- Westmount - 113
- Westlawn - 192
- Crestwood - 37
- Parkview - 174
- Laurier Heights - 113
- Hillcrest - 168
- Parkview - 155
- Westmount - 94
SCHOOL ATTENDANCE AREAS
Students residing in CENTRAL

Elementary students

Junior High students

CHANGE IS COMING.
SCHOOL ATTENDANCE AREAS
Students Residing in SOUTH CENTRAL

Elementary students

Junior High students

BE A PART OF IT.

EDMONTON PUBLIC SCHOOLS
**QUESTION 4:**

People have told us that the maps and information on the previous pages will help them understand sector planning better. What do these numbers mean to you? How do we make best use of available resources so that all students have access to vibrant schools and a range of quality programs in their sectors?

In the past, some schools that closed due to excess space were transformed and used in different ways. Children who originally went to these schools moved to other schools, and the school buildings are being used in the community for other purposes. Examples include District programs for students, a health centre, church and francophone schools.
Leases, tenants and partners may provide valuable support and services to schools and communities.

- There are 190 leases and tenants in schools across the District.
- These generate $1.7 million in leasing revenue.
- That revenue is used to cover some of the costs of cleaning, heating and maintaining the leased space.

**QUESTION 5:**

a) If a school stays open, what are some ways extra school space (including spaces not used as classrooms) could be used?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

b) If a school closes, what could the building be used for if it isn't used as a school? What would you like to see?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

**COMMENTS**

Please use this space to tell us anything else you would like us to know. What else do you think should be considered?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Thank you very much for taking time to provide your input in this Sector Planning Review Process.
HOW TO USE THIS WORKBOOK TO HOST A CONVERSATION

Are you interested in discussing this topic with family, friends or others in your community? This workbook can be used to guide your conversation with others. It has been designed to help you learn about the issues and share the group’s thoughts, ideas, and suggestions.

- Assemble a group together. A group of 8-10 people is ideal.
- Designate someone to record the conversation. Make sure key points and concerns are written down.
- Make sure everyone has a chance to speak. Including everyone's ideas will add to your conversation and help participants understand each other's views.

HOW TO SUBMIT YOUR INPUT

Choose the one most convenient for you:

- Drop-off at your local school office
- By fax at 613.724.2450
- By mail to 2031 Neepawa Avenue, Ottawa, Ontario K2A 3L7
- Email the fillable online version to info@dialoguepartners.ca

You can get more copies or a pdf version of the workbook from the website at http://www.sectorreview2010.com

PLEASE SUBMIT YOUR WORKBOOK BY JUNE 18, 2010

Are you interested in being added to our contact list? If so, please provide us with the following information:

Name:
Address:
Email:
Phone Number:

FREEDOM OF INFORMATION & PROTECTION OF PRIVACY (FOIP)

If you have indicated that you would like to be included on the contact list, you may be contacted by phone, letter or e-mail for the intended purpose. Personal information is collected for the purpose of supporting the development of a public engagement program and providing input into the decision making processes in regards to sector planning. All personal information is collected in accordance with the Freedom of Information and Protection of Privacy Act, the Alberta School Act, and board policies of Edmonton.
Appendix E-Dialogue Partners Materials and Resources

Dialogue Partners has produced a number of communication pieces to support the company:

- 2 Post cards, top ten lists
- DP Training Brochure (3 fold, 4 panel)
- Case Studies
  - Case Study 3, Canadian Environmental Assessment Agency, development of public involvement guides and toolkits for engaging stakeholders in environmental assessment.
  - Case Study 4, Qikiqtani Truth Commission, facilitation and community consultation
  - Case Study 5, Natural Resources Canada, Nuclear Legacy Liability Program
  - Case Study 6, Canadian Blood Services, process and design and facilitation for leadership conference
- White Paper on the use of Community Priorities in Public Engagement
TOP TEN LIST OF THINGS WE’VE LEARNED #1:

1. Embrace your enemies.
2. There are no enemies.
4. Political rhetoric will sink everyone’s ship.
5. Hold hands with your clients/boss.
6. Roller coasters are good for your mental health.
7. All you have is your integrity.
8. If your knees are shaking, that’s a good thing.
9. Do things where there are no guarantees.
10. Practice gratitude.

After years of being in the trenches of public and community engagement, we’ve learned a few things about what works – and what doesn’t.

We hope this “take-away” of Top Ten things helps you in your work.

To see our expanded Top Ten Lists:
> Scan the QR code into your Smartphone, or
> Follow the short link http://bit.ly/qf2jpN
TOP TEN LIST OF THINGS WE’VE LEARNED #2:

1. The Rolling Stones had it right.
2. Responsibility is a 2-way street.
3. It’s not that hard to reach the hard to reach.
4. Saying sorry has to mean something.
5. Empathy is not a strategy.
6. The politics of division is here to stay.
7. Representative process just doesn’t cut it.
8. Participants – not you - need to say your process was a good one.
9. You have to go through the trench to get to the other side.
10. Practice gratitude.

After years of being in the trenches of public and community engagement, we’ve learned a few things about what works – and what doesn’t.

We hope this “take-away” of Top Ten things helps you in your work.

To see our expanded Top Ten Lists:

> Scan the QR code into your Smartphone, or
> Follow the short link http://bit.ly/qVUN3Z
WHAT WILL YOU LEARN?

THE INTERNATIONAL ASSOCIATION FOR PUBLIC PARTICIPATION (IAP2) CERTIFICATE IN PUBLIC PARTICIPATION (3 MODULES, 3 DAYS)

Module 1: Planning for Effective Public Participation (3 days)
- In this introductory module, you will learn the foundations of public participation, the importance of setting clear objectives, of delivering on a promise to the public, and how to determine the appropriate level of public participation. A rigorous step-by-step approach will be outlined along with the IAP2 Core Values and Code of Ethics.

Module 2: Communication for Effective Public Participation (3 days)
- Now that you have the basics of public participation, you will learn about communication skills needed as a public participation practitioner, including an exploration of how to clearly communicate complex information, develop key messages, and increase abilities to engage participants in emotional and risky issues.

Module 3: Techniques for Effective Public Participation (3 days)
- This interactive module will give you an opportunity to learn about and practice a wide range of different techniques and practical tools that have been tested and used by public practitioners around the world.

IAP2 Emotions, Outrage & Public Participation (2 days)
- Understand the factors that contribute to public outrage, the link between outrage management and meaningful public engagement, and understand and apply strategies for addressing and reducing outrage in your public engagement programs.

ANALYZE THIS! Making Sense of Conflict in Public Engagement® (1 day)
- Being able to identify, assess and resolve conflict before the public is engaged will go a long way in diffusing intensity and creating opportunities for constructive dialogue. Build the skills needed to identify, understand and assess conflict in public engagement. We strongly encourage participants to take this course prior to registering for "Standing in the Fire: Transforming Conflict Through Collaboration®.

Standing in the Fire: Transforming Conflict Through Collaboration® (2 days)
- Master Course
- Geared to seasoned practitioners who are focused on solving complex problems that inevitably arise in public engagement situations, this course will build skills and knowledge in specific methodologies, approaches and techniques for dealing with conflict and high emotion in those seemingly impossible circumstances we face.

Group Facilitation Skills for Public Engagement® (2 days)
- This course emphasizes the planning and designing of meaningful and effective facilitated public engagement events and has a practical component that gives all participants ample opportunity to practice facilitation. Participants will learn facilitation skills to deal with emotion, expand positive participation, identify and build common ground and move discussion forward.
SAVE YOUR SPACE!

For a more detailed description of these courses and/or to register for upcoming sessions, please visit our website at: http://www.dialoguepartners.ca/civic-engagement-services/training/.

Tech-sawy AND want to register now? Use your smart phone to scan the QR code.

CHANGED PRIORITIES AHEAD

YOUR LEARNING COACHES

Stephani Roy McCattum is the Managing Director at Dialogue Partners Inc. and has been a licensed trainer of the IAP2 Certificate in Public Participation since 2005. She was the lead developer of IAP2's Direction and Public Participation and is an IAP2 Accredited coach and mentor for new candidate trainers for all of IAP2's training programs. She was the interim President of IAP2 International and has worked in a variety of international settings, with a wide diversity of participants, in a wide range of environments. Her experience includes facilitating workshops on conflict resolution and transformation, community resilience and transitions. Stephani is an IAP2 Accredited Professional Facilitator and holds certificates in community development, conflict resolution and dispute resolution.

MEETING YOUR NEEDS

Are these courses close to, but not QUITE what you're looking for? We would be happy to discuss tailoring, combining or creating programs to suit your public engagement needs. Please contact us for more information.

YOUR LEARNING COACHES

Gate Simpson is a Dialogue Partners Associate and President of gWhiz Consulting Ltd. and has a background in public relations and community relations spanning more than 25 years, working with the federal government, educational and pruprization sectors. Her interest lies in understanding why conflict develops in public engagement and how practitioners can deal with these situations that are becoming more the norm. Gate has been a licensed trainer of the IAP2 Certificate in Public Participation since 2005, is an IAP2 Accredited trainer of IAP2's Direction and Public Participation, and regularly teaches about conflict transformation.

Are there other people who are experiencing the same things I am?

What do I do with all of these comments?

WHY are these people yelling at me?
A central purpose of the Canadian Environmental Assessment Agency is to strengthen the practice of environmental assessment in Canada through training and guidance.

WHAT HAPPENED: Dialogue Partners provided a best practices review, re-write and development of a series of Guidance and Toolkits for Public Involvement in Environmental Assessment. The Toolkit was published in the spring of 2008 and can be found on the CEAA website.

THINGS WE LEARNED: Working to get agreement with environmental and industry groups on guidance content required extensive negotiation and mediation. Reflecting the spirit and intention of the legislation versus the letter of the law was important to present best practices, flexibility and opportunities for meaningful engagement. Creating the toolkit, and then testing it with stakeholders, helped refine and improve the materials.
QIKIQTANI TRUTH COMMISSION FACILITATION AND COMMUNITY CONSULTATION

Dialogue Partners was retained by the Qikiqtani Truth Commission (QTC) to support their work in developing recommendations from months of hearings with Inuit people in Nunavut. The QTC was created to investigate facts, interview witnesses, hold public hearings and to report the truth surrounding the alleged dog slaughter, relocations, and other decision-making of the governments up until 1980, and to consider the effects of these decisions on Inuit culture, economy and way of life.

WHAT HAPPENED: With a mandate to tell the truth of the Inuit people, on multiple issues such as residential schools, relocation, housing, alcoholism and substance abuse, education, killing of sled dogs and “government mind set” we provided the following support: design, facilitation and reporting of meetings with elders and the Commission to develop recommendations and directions for change. The directions for change and draft recommendations are being used as a basis for additional conversations in communities, along with discussion on how to work towards reconciliation and healing. Dialogue Partners also designed and co-facilitated community conversation sessions, and then trained and coached Inuit co-facilitators who led sessions in the 13 communities in the Baffin Region in the high Arctic.

The truth that has emerged is a shared one - where the oral testimony and the archival record document the same history and series of events, from very different perspectives. Recently, the Canadian Federal Government extended an official apology to the Inuit people for some of the wrong doing documented in the report.

THINGS WE LEARNED ALONG THE WAY: people understand each other's views and perspectives, so that they can engage in dialogue in a meaningful way. We believe that once we understand each other, we can begin to talk together in a different way - even if we don't agree on everything. Through our work, we're continually learning that perceptions aren't right or wrong - they just are. Our experiences have shown us that your truth and my truth are influenced by our background, experience, culture, gender and values, and that sometimes, other people have a different perspective on the same issue or experience. When we understand each other's perspectives, we can create a shared truth.

"We can create an enormous amount of harm, for example, by not listening to other people who might have different views and insights."
— Jon Kabat-Zinn
Working with our partner, AMEC Earth and Environmental, Dialogue Partners worked to develop and build community relationships to support the creation of a long-term strategy for the clean up and management of radioactive waste at Atomic Energy of Canada sites throughout the country. Initial focus was on the upper Ottawa Valley area near the Chalk River Laboratories where 70% of the nuclear waste is located.

**WHAT HAPPENED:** Dialogue Partners conducted interviews with key stakeholders to understand their needs, level of awareness and desire for information; we drafted information materials designed to make complex, technical information understandable and accessible; we designed and facilitated a focus group on the materials with key stakeholders; met with First Nations and Métis communities and representatives; facilitated internal working group meetings; designed and populated the project website; and hosted information sessions in a number of different communities.

**THINGS WE LEARNED:** Balancing the needs and expertise of scientists and technical experts with the needs and interests of community and stakeholders is crucial. Coaching, strategic advice and capacity building were built into the project. Testing of materials, process and approach is critical to “getting it right” and meeting stakeholder needs. Some of the techniques used were pre-identified for us at the start of the project, and together we learned and affirmed that there is great value in asking stakeholders how they want to be involved, and engaging them where they gather already, instead of scheduling meetings for them to come to us. Ongoing relationship building with Métis, First Nation and other communities of interest will be important as the project goes forward.

CANADIAN BLOOD SERVICES
PROCESS DESIGN AND FACILITATION
FOR LEADERSHIP CONFERENCE

Dialogue Partners was engaged to provide expert advice and coaching to build staff capacity for leadership development and to plan, design and facilitate a leadership conference with the organizational senior management team.

WHAT HAPPENED: We worked with staff to design and develop materials and methodologies for a 2.5 day leadership conference, and then facilitated the event, one day of which involved co-facilitation with renowned author Margaret Wheatley. Leadership staff were energized, enthused and rejuvenated as a result and progress was made in a number of significant areas.

Supporting staff capacity while the work took place meant trust and faith in process and ability for everyone in the organization. Addressing issues of organizational hierarchy, and supporting all participants to question assumptions and talk about the "hard issues" was key. Methodology, design and innovative facilitation techniques were used to accomplish these tasks.

THINGS WE LEARNED Assisting organizations so they have the capacity to be successful: You have one opportunity to build trust and respect with stakeholders. You have good ideas, but as an organization you may lack the experience. With a combination of planning, coaching, skill development and a small measure of trust and faith...your organization can lead these important conversations, build relationships with partners and create the capacity to be successful. Working with Canadian Blood Services has shown us time and again that commitment, leadership and values make the difference.

"Successful organizations, including the Military, have learned that the higher the risk, the more necessary it is to engage everyone's commitment and intelligence."
— Margaret J. Wheatley

OTHER WORK WITH CANADIAN BLOOD SERVICES:
- Dialogue Partners was engaged to provide expert advice and a best practices review of a public involvement plan for organ and tissue donation.
- Dialogue Partners has trained organizational staff in facilitation, group process, public participation and engagement techniques.
- Dialogue Partners has a standing offer with Canadian Blood Services for public involvement planning, design and implementation, research, facilitation, reporting and training services.

"In these troubled, uncertain times, we don't need more command and control; we need better means to engage everyone's intelligence in solving challenges and crises as they arise."
— Margaret J. Wheatley
White Paper on the use of Community Priorities in Public Engagement

Prepared by:

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President and CEO
Purple Forge
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Engagement and consultations with the public, employees and stakeholders often focus on the group defining and ranking their priorities. There are always lots of good and interesting ideas, but how do we determine the best idea? Through mass participation, Community Priorities allows participants to clearly define which are both the most and least supported ideas.

An underlying premise in any public engagement process is that each participant is an expert in his or her own life. The larger engagement process may be supported by technical experts with professional expertise - however regular people are experts too. They are experts in their own lives, they know their communities, they understand services, programs and the context and environment they live, play and work in. In fact some may be more expert than the so-called experts in very specific areas. There are rocket scientists amongst us.

Community Priorities

Community Priorities is an upgraded and mobilized version of crowd sourcing built on an open source software application initially designed by Princeton University, with support from Google.

Crowd Sourcing

There are many definitions of crowdsourcing, each with its own nuance. The expression reached popular culture in a 2006 Wired magazine article [2]. Below are a few definitions that highlight the role of presenting a problem/question to an open-ended group and collaborating towards solutions.

- Crowdsourcing is a distributed problem-solving and production model.
- Crowdsourcing is the act of sourcing tasks traditionally performed by specific individuals to an undefined large group of people or community (crowd) through an open call.
- Problems are broadcast to an unknown group of solvers in the form of an open call for solutions. Users—also known as the crowd—typically form into online communities, and the crowd submits solutions.
Community Priorities vs. other Crowd Sourcing Tools

Community Priorities takes the best of Crowd Sourcing techniques and allows for new ideas to percolate through, allowing the group to weigh, rank and prioritize the most supported ideas.

In a traditional crowd sourcing application, an idea is written into the discussion area. The user can be identified. The ideas often sit in a ranked order based upon time of submission waiting for people to review. Participants review the ideas, giving favorable or unfavorable comments and then voting. Some programs allow people to comment and possibly collaborate on the idea. The total number of votes determines the ranking of the idea. Thus the early good ideas often sit on top, receiving most of the attention and new late ideas rarely receive a second look. Compounding the issue is that participants often see the contributor’s name or identifier, which means that campaigns and followership often drive votes instead of the quality of the ideas.

Community Priorities is different. It levels the playing field; making sure the best ideas rise to the top, rather than the most popular contributor or the earliest submission.

Community Priorities has many tremendous attributes; from social sharing to the ability to be embedded in various delivery applications including web, Facebook widgets and mobile applications - all supported by the same “back door” and information. In addition, by using embed codes participating groups can also post the application, with the same questions on their sites, increasing the number and diversity of participants.

Community Priorities sets itself apart from other crowd sourcing tools because of its ease of use, the focus on generating ideas and allowing contributor submissions.

The binary framing of separate ideas allows participants to quickly identify and respond with their preference. Participants could be voting for or against an idea as both are appropriate. As well, there are a number of options for those who don’t know, can’t decide, or believe ideas are both equally good or bad. By allowing various reasons for I don’t know instead of forcing a vote, this allows the probability feature, (the main ranking feature) to be robust.

Community Priorities also allows a number of different reporting and data outputs that support analysis and the overall engagement process, including total votes and the probability of an idea winning.

The most robust reporting table is the probability rank table, which lists the probability of an idea winning. The idea has a score that is based on its results in the vote pairing, and does not rely solely on total votes, like other online tools. The probability table rank orders all the ideas, with equal weighting to user generated and seeded ideas.

Ideas that are similar statements often score closely together. New ideas enter the list in a neutral position. They are scored as 50%, which is neither positive nor negative. As the statement is voted upon through the binary setting it slowly builds a probability of winning score and works it way up or down the list.

The strongest ideas are voted to the top. The least supported ideas fall to the bottom. The program quickly ascertains where the group support lies.
In the development of Community Priorities, we have reviewed Princeton’s researcher’s materials and furthered them in a number of areas to ensure that best practices in public engagement are being followed.

**The Deployment of Community Priorities**

The marketplace of ideas includes two key elements: the over-arching question; and the statement portfolio, which are the statements that answer the question. There are a number of approaches that have proven to positively contribute to the engagement process.

The two distinct ways to organize a market place include:

- A large marketplace, seeded with 50 plus statements and open for a month or more; or
- Many small marketplaces with 20 to 30 statements open for shorter periods of time, e.g. 10 to 21 days. There are two versions within this approach.

Both large and small marketplaces have merit and a role to play in an engagement process.

The large market place means all ideas are worked on at once, with all priorities being developed across a broad range of issues. This provides a broad ranking and identifies many themes.

During a large-scale public engagement process for the City of Calgary with over 24,000 participants that included extensive web, mobile and in the room activities, the tool was deployed in the second phase of the project. The second phase was designed to allow citizens an opportunity to identify the City services they valued and felt were most important.

To start the conversation using the tool, we asked What City services are important to you? The tool was seeded with over 150 original statements (or answers) related to City services and business units. The marketplace ran for just under 5 weeks.

These initial seeded statements were statements reflecting the services provided by the City. These same statements were used as part of the larger engagement process, in the Budget Booklet and citizen and employee discussion guides, and at Community and Staff Forums, so there was consistency in engagement, language, tone and data collection.

The overall engagement process utilized a significant amount of social media to support the participation in the online tools deployed throughout the project. Twitter, Facebook, e-newsletters, blog and web landing pages helped to support traffic and familiarity with the tools in the process. Use of social media was crucial in encouraging and inviting participation on the marketplace.

The results speak for themselves: There were 119,811 votes on 1,358 ideas submitted by participants (not including the 153 seeded ideas) with 2,726 user sessions.

The tool was used in a number of ways to support the broader engagement process:

- It provided the ability to see peoples’ priorities not just within the statements of the business units but also city wide;
- These priorities supported the fine-tuning of the questions and processes in the third phase of the budget engagement process;
- It supported the theming from the discussion workbooks and online survey that received over 900 submissions; and
- Results of the input from the tool were weighted and analyzed with the input from other activities allowing trends to be identified in the 2nd Phase reporting.
Many Small Market Places of Ideas

Many small market places supporting separate areas of a project provide another option for use of Community Priorities. This second approach has been used by groups to support internal engagements such as development of mission statements and business lines. The technique utilizes multiple discreet market places and then each of these support a distinct element of the larger whole.

For example, there may be multiple values on how a group operates. The core attributes of each value could be seeded into a discreet market place and the group could contribute to each of these marketplace values. These conversations would then contribute to the overall mission statement of the organization, by clarifying the priority value propositions to be included.

Another approach to using many small market places is to engage people in a number of discreet and focused marketplaces and then use the best of those in seeding a final market place. These separate market places can then be compiled together to create overall priorities.

What makes a Great Marketplace

There are a number of common themes coming out of the Princeton research and our experience about what makes a solid market place:

- The statements need to be controversial, compelling or have the potential to spark reflection and thought;
- More statements make it more interesting;
- Depending on the end goal, deliberative higher order statements allow people to dream, while specific statements allow straightforward rank ordering;
- There is a balance between the number of ideas and the length in field – the goal is an interesting market place. Small seeded ideas and less time OR more ideas and more time. The users need to feel it is an engaging process;
- The breadth of the seeded ideas need to reflect the intended goal of the overall engagement process and the question being asked;
- Complete thoughts often support deeper ideas;
- Linking multiple ideas works if they are part of making a deeper statement; and
- The process needs to demonstrate integrity and ethics (trust), and quick response so that participants feel like their ideas are not being censored, edited or tailored (barriers to trust).
How do you get an active group of participants?

Online engagement applications need to be supported by a vast array of social media communication and electronic media, including:

- Tweeting and retweeting (with mobile links) directing participants to the tool, to controversial statements and to new questions on an ongoing basis;
- Facebook posts and Facebook widgets, discussion forums and repeats of the question and answers;
- In a mobile application, push notifications;
- Newsletters with links to the tool;
- Web page and a splash page with a note and link, refreshed on a regular basis, preferably with compelling, thoughtful and controversial statements to generate discussion and demonstrate openness and transparency; and
- Possible Google or Facebook ads and/or online banners on targeted websites to target to specific groups, regions or demographics.

The use of social media needs to be sustained and needs to reflect optimal times and approach for your engagement process with the broader group.

Community Priorities does not discern between the highly educated or the non-expert. All voting is treated equally without care towards the length of the user session or the amount of repeat visits.

The ability to be a repeat voter is positive experience. The repeat voter is challenged in “gaming the system”. Community Priorities cannot be easily gamed because new ideas are often added and the pairings are different and random. Each user has their own experience and none are exactly the same. In the reporting spreadsheet one would be able to determine if a person only voted for the right side or some other peculiar tacit. This voting technique would not distort the probability table.

The calculation of the score is an elegant equation:

\[
\text{Score} = \frac{(w_1 + 1)}{(w_1 + 1 + (l_1 + 1))} \times 100
\]

Once an idea has received many votes the power of its average/probability becomes an anchor that affixes it in the total ranking. Once a reasonable idea has been seen by many, i.e. many like it but it is not the best, it will be positioned in the upper quarter for a long period until many great new ideas out compete it.

The ease of use, the ability to have the same questions appear on multiple platforms makes community priorities an excellent public engagement tool. The flexibility of the tool allows different design approaches to ensure the information can be used within your larger public engagement process.
