The City of Calgary
Action Plan 2015-2018

In consideration of:
IAP2 Canada Project of the Year 2015
Extending the Practice Award
Creativity, Contribution and Innovation in the Field

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Publication #1: Calgary Herald. City Desk, News,Tel 403-235-7433   submit@calgaryherald.com
Publication #2: Metro Calgary. News tips,   403-444-0136   calgary@metronews.ca
Publication #3: Avenue magazine. Assistant Editor, Andrew Guilbert guilbert@redpointmedia.ca
<table>
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<tr>
<th>Title</th>
<th>Action Plan 2015-2018</th>
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<tr>
<td>Organizing Group</td>
<td>The City of Calgary</td>
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<td>Location</td>
<td>Calgary, Alberta, Canada population ~1,200,000</td>
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<td>Key Question/Problem</td>
<td>Calgary is one of the world’s most liveable cities. Yet, also faces challenges and costs associated with success and growth. Through Action Plan citizens, City Council and City staff established future direction and found the right balance between investing in quality public service and keeping tax rates affordable.</td>
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| Sample Methods        | Conducted online at [www.calgary.ca](http://www.calgary.ca) and in-person at 21 sessions located at community event and gathering places using:  
  - **Activity-based** methods of input (online City Priorities tool | in-person City Priorities dotmocracy | online Budget Simulator) , and;  
  - **Discussion-based** methods of input ( online City Talk discussion tool | in-person sticky note discussion boards | online open-ended comments in both Budget Simulator and City Priorities tool | citizen Ideation | social agency & business focus groups | Civic Partner Ideation | city staff Fluid Survey)  
  - **Methods for promotion and awareness** (Social media campaign consisting of Facebook, Twitter, Instagram, community newsletter articles, community blogs and The City of Calgary’s engagement portal) |
| Results               | The integrated results of the Action Plan 2015-2018 engagement strategy provided a comprehensive understanding of citizen and stakeholder perspectives and priorities that City Council and staff considered as they developed the City’s four-year road map (corporate business plans and budgets) for 2015-18. |
| Impact Level          | City-wide             |
| Time Frame            | Three weeks, March 2014 |
| People Engaged        | Multiple engagement and research tactics were implemented simultaneously and organized into four input streams. The four engagement-input streams included the following:  
  - **Reflection and synthesis** involved a review of citizen engagement and research activities across The Corporation conducted from 2010-2013.  
  - **Representative engagement** employed qualitative research methods. Participants in this stream were recruited to ensure representation of harder-to-reach populations and the broad diversity of perspectives of Calgarians.  
  - **Inclusive engagement** was the core effort of the engagement strategy, which sought to reach, educate, and solicit feedback from as many Calgarians as possible regarding spending priorities and the City’s long-term priority areas.  
  - **Internal engagement** leveraged City staff and civic partners’ specialized knowledge to generate ideas of ways to collaborate for efficiency and improved community success |
| Web Link              | [http://www.calgary.ca/CA/fs/Pages/Action-Plan/Results/Default.aspx](http://www.calgary.ca/CA/fs/Pages/Action-Plan/Results/Default.aspx)  
  [http://www.calgary.ca/CA/fs/Pages/Action-Plan/Citizen-Summary/Citizen-Summary.aspx](http://www.calgary.ca/CA/fs/Pages/Action-Plan/Citizen-Summary/Citizen-Summary.aspx) |
The Problem and Challenge

Calgary is one of the world’s most liveable cities. Yet, it also faces challenges and costs associated with success and growth.

*Action* Plan 2015-2018 describes how The City of Calgary will respond to the needs and aspirations of the citizens of Calgary over the next four years. It identifies priorities for the period and recommends the services and initiatives that will be provided, the performance results that Administration commits to accomplish, and the operating and capital budgets that will support the achievement of these results.

Gathering citizen input on The City’s Action Plan met with the challenge of presenting very complex information in a readily understandable format. The lack of familiarity held by the general public on The City’s business planning processes, and municipal financing sources and procedures, required creative approaches to providing information stakeholders required to provide meaningful feedback. *Action* Plan 2015-2018 represents the first time that the multi-year business plan and budgeting process moved to a 4-year cycle, in line with the new Alberta municipal election terms, increasing the information that would need to be conveyed to citizens about the process.

Another of the challenges of the *Action* Plan 2015-2018 engagement involved the sheer scale of the input required. Consultation would be sought on priorities and spending that would in some way impact virtually every City department. Furthermore, virtually every Calgary citizen was considered a stakeholder.

How does P2 respond to those challenges or opportunities?

City Council, at its meeting on Nov 18, 2013 identified that “the inclusion of stakeholder input as a component of the multi-year [business planning and budgeting coordination] process enhances the quality of Council Priorities, Departmental Business Plans, Budgets, and ultimately, the services delivered to Calgarians.”

*Action* Plan 2015-2018, and its engagement component was designed to enable Calgarians the opportunity to provide their input on how The City should prioritize spending to continue to move Calgary towards achievement of long-term goals.

Given the challenge of the wide scope of the project, both in terms of business operations impact and widespread stakeholder involvement, it was determined early on that no single engagement tactic on its own could provide enough input to support Council decision making. As a result, the *Action* Plan 2015-2018 engagement strategy sought feedback across distinct streams, using multiple channels and a variety of methods in order to best gather the breadth of input required to span the Action Planning process.
The City of Calgary – Action Plan 2015 - 2018 – Project of The Year

The Role of Public Participation
Level of engagement and project objectives.

IAP2 Spectrum: Consult

Gather insights from citizens on Council approved tax rate scenarios, services and priorities; and from staff on efficiencies and collaboration in order to inform Council decisions on indicative tax rates and Council Priorities; and, to inform Administration in the development of departmental business plans.

Council directed that engagement was to:
- Be comprehensive, inclusive, and provide multiple opportunities across multiple channels to participate;
- Improve access and convenience of face-to-face opportunities through locating engagement events at community gathering places such as malls, libraries, leisure centres, parks, etc.;
- Ensure citizen awareness of engagement opportunities through extensive marketing;
- Embed opportunities for education on the City’s services, budgets and business planning process in the engagement tactics;
- Focus dialogue on the community vision outlined in The City’s guiding strategic documents;
- Leverage existing engagement and research results in the development and implementation of the engagement strategy.

To meet Council’s engagement objectives within the time frame of Action Plan, multiple engagement and research tactics were implemented simultaneously in March 2014 and organized into four input streams. The four engagement-input streams included: reflection and synthesis, representative engagement, inclusive engagement, and internal engagement.

- **Reflection and synthesis** involved a review of citizen engagement and research activities across the corporation conducted from 2010-2013.
- **Representative engagement** employed qualitative research methods. Participants in this stream were recruited to ensure representation of harder-to-reach populations and the broad diversity of perspectives of Calgarians.
- **Inclusive engagement** was the core effort of the engagement strategy, which sought to reach, educate, and solicit feedback from as many Calgarians as possible regarding spending priorities and the City’s long-term priority areas.
- **Internal engagement** leveraged City staff and civic partners’ specialized knowledge to generate ideas of ways to collaborate for efficiency and improved community success.
What is the decision statement?

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

The role of the public and stakeholders.

- Public:
  - The public were asked to help make decisions on workplans, budgets and tax rates by using the Budget Simulator tool to register their priorities for spending. Additionally, the public contributed to the development of Council priorities (City Council’s strategic direction to City Administration) by ranking and submitting long-term planning priorities for the City’s Business Plans.

- Targeted public stakeholders:
  - Participants in the citizen Ideation session, business representatives, and social and community agencies provided insight and deeper exploration of some of the tax-related and service-related themes that arose from the annual Citizen Satisfaction Survey that aligned with Action Plan objectives. These research sessions were designed to contextualize the inclusive engagement stream. The citizen Ideation session (a proprietary computer-assisted, qualitative research methodology for large group discussions) gave a check-in point to see that the results that were coming in on-line and at in-person sessions were not dominated by any one group of voices. The focus groups conducted with businesses, social and community agencies were included to ensure that those perspectives were not missed from the Action Plan engagement.

- Civic partners:
  - The City invests significant resources in its Civic partners’ organizations, including operational and capital funding, land, buildings, artifacts and liaison support. In turn, the Civic Partners manage these resources and provide Calgarians with a wide range of opportunities and services. Consequently, it was critical that these organizations were provided an opportunity to contribute to The City’s business planning and budgeting discussion.

- City employees:
  - City Staff are key stakeholders for many aspects of the business planning and budgeting discussion. They are already engaged by their respective departments for inputs into the development of those departmental plans. There was still a desire to understand more about their experiences in terms of what could be done to increase collaboration and efficiencies from a corporate perspective.
Alignment with Core Values

How did you align with the core values?

Those who are affected by a decision have a right to be involved in the decision making process: City Council, at its meeting on Nov 18, 2013 identified that “the inclusion of stakeholder input as a component of the multi-year [business planning and budgeting coordination] process enhances the quality of Council priorities, departmental business plans, budgets, and ultimately, the services delivered to Calgarians.”

The public’s contribution will influence the decision: Citizen input was provided to City Council as an input to their strategic planning process in the development of Council priorities and the indicative tax rate. Engagement results were also provided to City Administration for the development of their proposed business plans (subsequently deliberated and approved by City Council).

Recognize and communicate the needs and interests of all participants, including decision makers: Input was highly aligned with decision-maker needs. This facilitated the direct incorporation of input to the decision-making process. Input collection methods were designed to meet citizen and stakeholder needs, encouraging high rates of participation and thus a robust collection of input.

Facilitate the involvement of those potentially affected by or interested in a decision: Complementing online engagement by attending community events and gathering places allowed the engagement process to reach a wide diversity of citizens in their own neighbourhoods, at libraries, shopping centres, parks, ethno-cultural events and other community hubs.

- The engagement strategy sought feedback across multiple channels and a variety of methods. This helped reach as many Calgarians as possible, in order to best gather the breadth of input required to span the Action Planning process across all City Departments. An extensive marketing and awareness campaign on opportunities to participate complemented the engagement activities.
  - Six Ads in three newspapers
  - 640 Transit ads
  - Two Ads in 127 Community Newsletters
  - Social Media ads promoted 14,900 times
  - 307 E-newsletters sent
  - 13 Bold Signs
  - Seven Fairchild Ethnic Radio Ads over 59 spots
  - Eight Shaw TV City Matters
  - 4000 Budget Kits
  - Posters in all City facilities
  - Internal & external digital displays
Seek input from participants in designing how they participate: Secondary research of citizen input gathered from 2010-2013 as well as lessons learned from engagement conducted for the previous multi-year business planning and budget cycle was used to develop the engagement strategy for Action Plan 2015-2018.

Provide participants with the information they need to participate in a meaningful way: Citizen engagement was structured to be interactive, maximize educational opportunities and minimize depth of specialized knowledge of municipal processes and corporate finance - in addition to being a methodology for collecting targeted input.

- **Activity-based methods of input** reduce the need for subject matter expertise by embedding subject complexities into the structure of the activity. Content in the activities provides something for participants to respond to which increases the clarity of input. Activity-based engagement methods constrain input to within the limitations of the activity. Input methods of this type employed in Action Plan engagement include:
  - Online city priorities tool
  - In-person city priorities dotmocracy
  - Online Budget Simulator

- **Discussion-based methods of input** generate context for the input collected and contribute to transparency by encouraging participant-to-participant interactions. Discussion-based methods do not address subject-specific education nor limit input from going off-topic. Input methods of this type employed in Action Plan engagement include:
  - Online City Talk discussion tool
  - In-person sticky note discussion boards
  - Online open-ended comments in both Budget Simulator and city priorities tool
  - Citizen Ideation
  - Social agency & business focus groups
  - Civic partner Ideation
  - City staff Fluid Survey

Communicate to participants how their input affected decisions: Comprehensive reporting on the results of each stream of engagement as well as an integrated summary were provided online and at a public presentation to City Council within four-weeks of the conclusion of the engagement period. Each department included an articulation of how engagement was incorporated into the resultant business plan proposed to Council in the autumn of 2014.

Don’t forget to tell us about the decision making process.

City Council sets indicative tax rates in May of the business planning year. This decision helps to provide scope to City Administration in developing business plans and budgets which are subsequently deliberated and approved by City Council in the autumn of the business planning year. Citizens and stakeholders were asked to consider the impact to services of differing tax rate scenarios. This activity on balancing trade-off not only provided Council information on
citizen perspectives on the municipal tax rate, but within that, which existing services were priorities for citizens and to what degree.

City Council also sets Council priorities to direct City Administration in the development of the 4-year business plans. Citizens and stakeholders were asked to articulate their priorities against The City’s long-term planning documents and these were formatted for easy comparison with the resultant Council Priorities

Creating relationships and building trust
Action Plan 2015-2018 sought to build relationships and trust through a transparent process and demonstrated commitment to incorporating citizen input into the decisions around municipal tax rates and setting Council priorities.

- Commitment by the corporation to the engagement strategy:
  - Action Plan involved all levels of the corporation in the engagement to some degree, seamlessly integrating stakeholder input into the Action Plan process. City Council set the direction for engagement, City operational staff designed and delivered the engagement strategy and City business planners and senior managers used the results of engagement in the development of their departmental plans.

- Commitment to using engagement results through reporting:
  - Comprehensive reporting on the results of each stream of engagement as well as an integrated summary were provided online and at a public presentation to City Council within four-weeks of the conclusion of the engagement period.
  - Each department included an articulation of how engagement was incorporated into the resultant business plan proposed to Council in the autumn of 2014.

- Transparency through interactive methodologies:
  - Both the online discussion forum and in-person discussion boards sought to share, in real time, participant input with other participants in order to share the direct input The City was collecting and reporting to Council

- Transparency through reporting format:
  - Given the complexities of municipal business planning and budgeting it was important that participants could see a clear line of sight between the input they provided and the resulting decisions made by Council on tax rates and business priorities. To this end the engagement methods of input mimicked as much as
possible the decisions facing City Council.

Evaluation Process
Provide a brief summary of the project evaluation process.

Evaluation of the Action Plan process was conducted a variety of ways:

- **Participant experience**: Participant evaluations of Ideation sessions were conducted by Ipsos-Reid
- **Awareness and understanding**: Pre and post-engagement survey with citizens conducted by Ipsos-Reid
- **Usefulness of results**: Council and senior administration comments and reactions to results
- **Vendor experience**: Online vendor debriefs to evaluate implementation and inform project lessons learned
- **Facilitation experience**: Event facilitator post-engagement survey to evaluate implementation and inform project lessons learned
- **Project experience**: Engagement Resource Unit debrief to evaluate implementation and inform project lessons learned
- **Adherence to The City's engagement policy**: Engagement Resource Unit subject matter experts reviewed engagement strategies so that the Action Plan process reflected The City’s engagement principles by being accountable, inclusive, transparent, committed and responsive

Describe the project’s effectiveness in achieving results.

- Complementary techniques mitigated the weakness of any given tactic with the strength of another
- Activity-based engagement reduced barriers to participation by reducing the need for specialized knowledge resulting in a high number of public submissions (~6800) in three weeks
- Reporting the results in a ward to city-wide format increased the relevance of the results to stakeholders and decision-makers
- Positive citizen interactions with City staff as event facilitators put a human face on City services
- Encouraging members of City Council to help promote the opportunities to participate through their community networks was very effective
- A detailed work plan optimized the coordination of engagement staff
- Well-defined objectives and prepared content made rapid execution successful for all online tools
- City departments were able to articulate how citizen and stakeholder feedback was reflected in the business plans and budgets
- The nature of the activities to discuss tax rate/ spending priorities as well as long-term planning priorities created a high degree of transparency between stakeholder experience and decision-maker needs

“There’s merit in doing this. There’s even more merit...and value...and IMPORTANCE...in SHARING the findings/results and making it EXPLICITLY clear and transparent that this process actually contributed to and influenced policy decisions.”

~Participant Quote

See report-back video here
Uniqueness of the Project

- A strategy for using secondary research, primary research and engagement results were developed as complementary input streams into an integrated report on citizen and stakeholder perspectives on the City’s budget as well as spending, service and planning priorities.
- Inclusive online and in-person engagement activities were direct mirrors of each other. This facilitated integration of the results of engagement as well as provided a consistent experience for the public regardless of how they came to the engagement process.
- Attending community events and gathering places allowed the engagement process to reach a wide diversity of citizens in their own neighbourhoods, at libraries, shopping centres, parks, ethno-cultural events and other community hubs.
- Input was highly aligned with decision-maker needs; this facilitated the direct incorporation of input to the decision-making process.
- Reporting on engagement results by including a comparison of ward-specific to city-wide results allowed decision-makers to better understand how the specific feedback they hear from those they represent comes together to create a city-wide picture on citizen perspectives.

Independent References

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