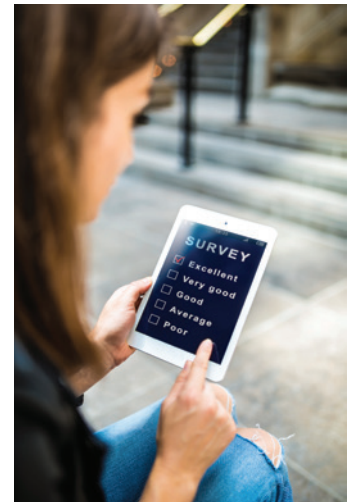


Calgary



Engage Framework and tools

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Introduction to the Engage Framework

At The City of Calgary, we make decisions that impact more than a million people on a daily basis. Public engagement helps ensure our governance remains in line with the wants, needs and expectations of the people we work for. By engaging citizens and other stakeholder groups in the decision-making process where appropriate, we can achieve:

- ▶ Better project outcomes or decisions.
- ▶ Objective input.
- ▶ Strengthened relationships with citizens and stakeholders.
- ▶ Credibility as a government that is responsive to its citizens.

The City's Engage Policy CS009 (page 12) is in place to ensure we set a standard of excellence when working with citizens and stakeholders by following engagement best practices consistently across The Corporation. The Engage Framework spells out those best practices, and is intended as a guide to assist you in understanding the purpose of engagement as well as your own role and responsibilities within the process. It outlines the concepts of public and internal engagement, as well as The City's approach, commitment and expectations. It explains the benefits of engagement and includes various tools to help you incorporate engagement into your projects.

Setting realistic expectations

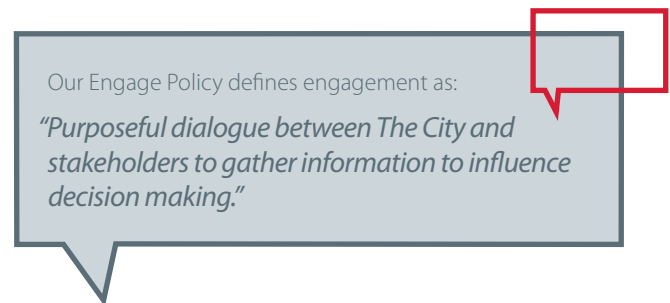
Stakeholder contributions are unscripted, conversation based, and often emotionally charged. It can be stressful, and at times, it can get messy.

Although we may wish that at the end of a project all of our stakeholders will be happy with the outcome, that is generally not realistic. The purpose of engagement is not to make everyone happy, it is to ensure that all voices are heard and considered when making decisions that impact others.

Understanding engagement

The City of Calgary develops policies and makes decisions on matters that affect the lives of its citizens and stakeholders. Inviting stakeholders to participate in conversations about those decisions is an excellent way of adding viewpoints, information and value to the decision-making process.

Stakeholders have the option for involvement in issues that affect their lives, and The City has a responsibility to ensure they have the opportunity to be involved.



This definition of engagement is an important part of the Engage Policy because it establishes a common understanding within The Corporation and beyond. Here, engagement is about more than simply talking to stakeholders. It's about inviting and initiating conversations that can influence decision making.

Understanding and identifying stakeholders

We define stakeholders as: “Anyone (person or group) who can impact or be impacted by the results of a decision made by The City.”

Stakeholders can be members of the community at large, customers, businesses, non-profit organizations, community organizations and partners, other government agencies, and internal departments, business units and staff.

These individuals and/or groups may:

- ▶ Be directly or indirectly affected by your project or decision.
- ▶ Have an interest in your project or decision.
- ▶ Have something to offer your project or decision.
- ▶ Impact your ability to carry out your project or decision.
- ▶ Have influence on your project or decision.

The engagement process should include as many stakeholders as can be identified and are willing to participate. An inclusive process is needed to:

- ▶ Understand all perspectives on an issue and ensure diverse views are shared, heard and understood between stakeholders themselves as well as with The City.
- ▶ Balance the loud voices of a few with the silent thoughts of many.
- ▶ Ensure those stakeholders who are typically difficult to reach because of barriers and constraints, are identified, invited and encouraged to participate by removing the barriers.

As we demonstrate our commitment to better engage and include stakeholders in the decision-making process, there are some things we need to remember:

- ▶ Stakeholders often have knowledge of their communities and/or information we don’t have.
- ▶ Stakeholder concerns go beyond the technical details and will be tied to personal beliefs and values. We need to ensure we respect all voices brought forward.
- ▶ The City has multiple engagement projects on the go at any given time. We need to respect stakeholders’ time and align our engagement efforts where possible.
- ▶ Engagement that is not meaningful will be recognized, and The City will be held accountable for poorly orchestrated or ineffective engagement processes. This makes it more difficult the next time we need to work with those affected stakeholders.

People who choose to participate in public engagement activities are increasingly knowledgeable and sophisticated in their expectations. In order to meet those expectations, to build trust and credibility, we need to model a consistent approach to engagement that demonstrates our genuine commitment and high standards of practice.

Opportunities for engagement

Not every project or decision made by City Council requires large-scale engagement. It is important to assess the need for engagement and choose appropriate engagement strategies, based on project and stakeholder needs. Even when engagement is not required for your project, there are other forums for public comments, such as Standing Policy Committee meetings and Public Hearings of Council.

The Engage Policy (page 12) provides direction as to the types of opportunities where citizens and stakeholders should be engaged, including:

- ▶ Specific planning, policy and project initiatives that directly or indirectly impact citizens and stakeholders.
- ▶ Mandated/legislated processes involving public participation.

How do you know if your project requires engagement? Consider:

- ▶ Has the decision(s) already been made or will the input be used to influence the decision? If the decision is already made or will be made regardless of input, engagement is not appropriate for your project.
- ▶ Is there potential for citizens/stakeholders to be impacted by the outcomes of the project / initiative?
- ▶ Is there legislation or regulation requiring engagement for this project / initiative?
- ▶ Have promises been made to stakeholders about their ability to give input into the project?

If a project has a direct or indirect impact on citizens and stakeholders, an Engage Assessment (Appendix B) must be completed by the project manager and communicator to determine if engagement is needed.

Here are some examples of projects that typically have an impact on stakeholders:

- ▶ Planning
(e.g. Transportation network and transit service, Parks development.)
- ▶ Policies and Bylaws
(e.g. Snow and Ice Control Policy, Community Standards bylaw.)
- ▶ Project initiatives
(e.g. Upgraded or new transportation infrastructure, new community or recreation facilities.)
- ▶ Mandated/legislated processes
(e.g. Cell phone towers, area re-development plans.)
- ▶ Internal City of Calgary initiatives
(e.g. Corporate-wide IT projects, department reorganizations.)

The Engage Process

The City's approach to engagement is well defined and needs to be standardized across The Corporation. The Engage Process (Figure 1, page 7) consists of six steps which detail the fundamental components of good engagement, and when used consistently across The City will ensure we are putting forward our best and demonstrating The City's commitment to the engagement process.

STEP 1 – Engage Assessment

The Engage Assessment (Appendix B) is available to help project managers determine whether a project requires engagement. If it is not required, then it will help clarify why not. This tool will also help assess the impact and complexity of a project with respect to engagement and outline who should approve the engagement strategy.

Project managers, along with communicators, should complete the Engage Assessment and submit it to the Engage Resource Unit at engage@calgary.ca.

STEP 2 – Develop a plan

Once your Assessment is complete, the Engage Resource Unit will work with the project manager and communicator to develop an engagement strategy and plan. An engagement plan serves as a roadmap for the engagement process and helps clarify:

- ▶ Engagement goals and objectives.
- ▶ What you are seeking input on.
- ▶ Who your stakeholders are.
- ▶ Details such as engagement scope, budget, timelines, dates, roles and responsibilities.
- ▶ At what level on the Spectrum of Strategies and Promises (Appendix C) you are engaging your stakeholders.
- ▶ Decisions that are not open to input.

Checkpoint: During the development of the engagement plan, ensure there are discussions with the Ward Councillor(s) office, and if applicable, the Mayor's Office.

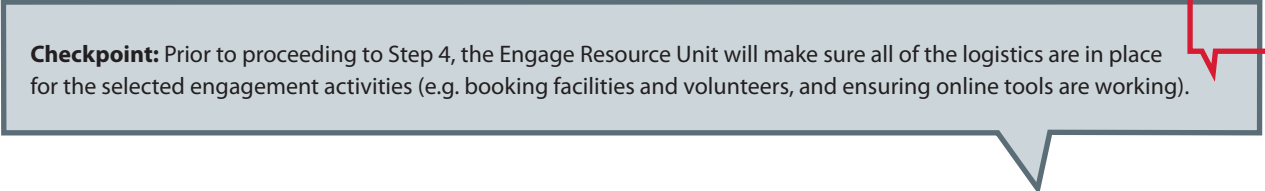
STEP 3 – Tell the story

In order for citizens and stakeholders to provide meaningful input, they need to understand the project. Build this knowledge by sharing the details of the project in plain language (see Policy CS014 for more details), including what has been done so far, why engagement is needed, what is being considered, what are the constraints, and how input is going to be used.

To build credibility and trust in the engagement process, stakeholders will also need to understand:

- ▶ The overall engagement timeline.
- ▶ Details of the engagement activities.
- ▶ Who will be reviewing the input and making decisions.
- ▶ What is expected of them as a stakeholder.

This information will be shared at the outset and will be developed by the Engage Resource Unit and the project communicator.



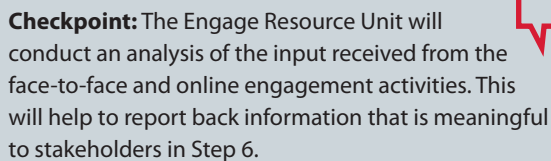
Checkpoint: Prior to proceeding to Step 4, the Engage Resource Unit will make sure all of the logistics are in place for the selected engagement activities (e.g. booking facilities and volunteers, and ensuring online tools are working).

STEP 4 – Raise awareness

Citizens and stakeholders are unable to provide input if they don't know about the opportunity to do so. The engagement plan should work together with the project's communication plan to generate awareness about the engagement opportunities.

STEP 5 – Connect

This is the step where you connect and work with your stakeholders through the engagement opportunities that have been outlined in the engagement plan. Do so in a genuine, open and honest manner.



Checkpoint: The Engage Resource Unit will conduct an analysis of the input received from the face-to-face and online engagement activities. This will help to report back information that is meaningful to stakeholders in Step 6.

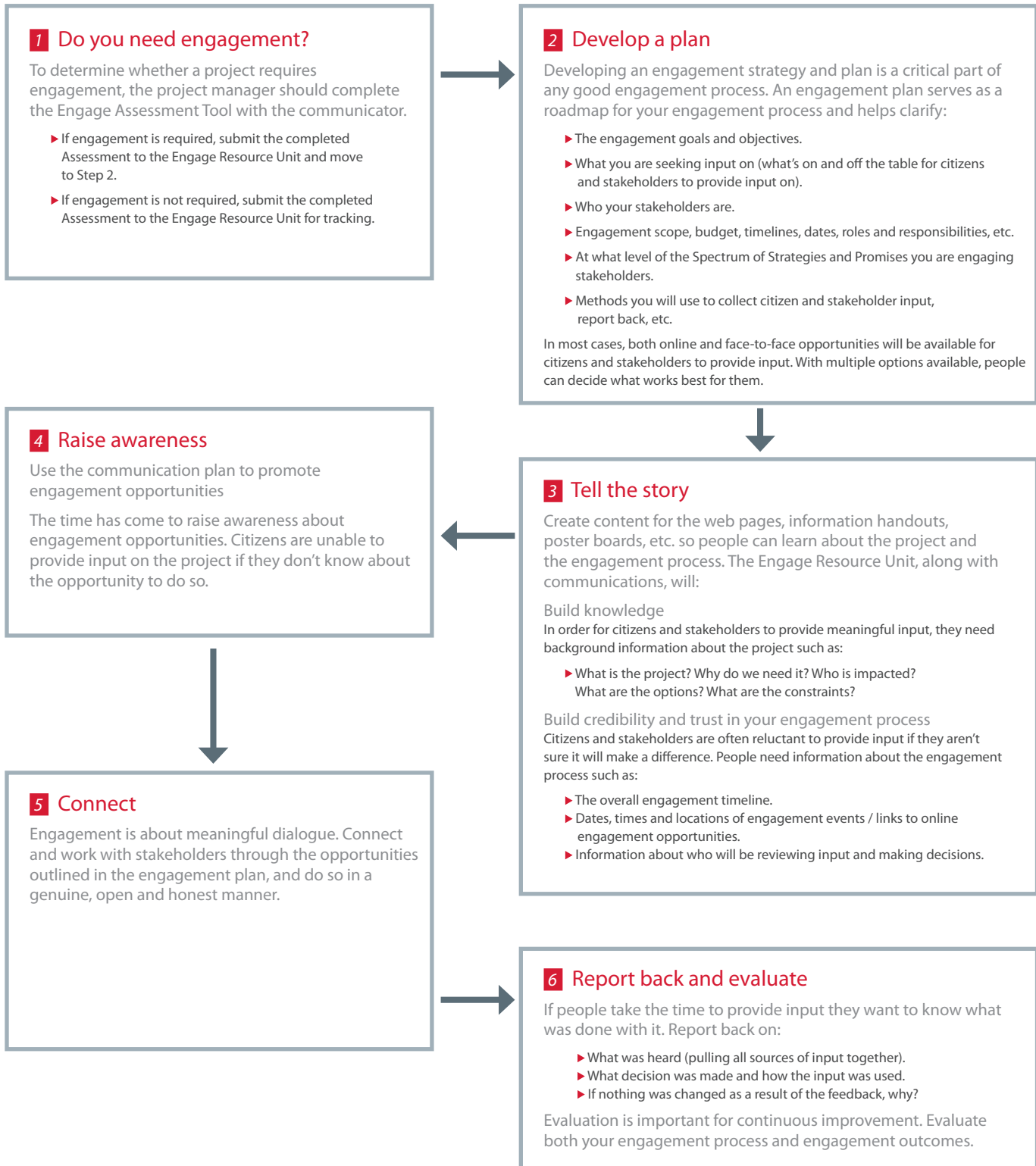
STEP 6 – Report back and evaluate

One of the foundations of a good engagement process is to ensure stakeholders know what you have done with their input. When preparing report backs, The City will tell stakeholders what was heard, how that input influenced the decision, and if it didn't, why not. By ensuring this feedback loop happens, stakeholders will be more inclined to participate in future engagement opportunities. If they know their time and efforts are being respected, we will continue to gain trust and credibility.

Good engagement is not a formula. The engagement plan should be designed to meet the unique needs of the stakeholders and the project at hand. By evaluating the process and engagement outcomes, The City can document lessons learned that can be applied to future projects. This extra step ensures we continually refine and improve our engagement efforts and approach.

Figure 1:

Engage Process diagram



Working together

Engagement shouldn't be considered a separate step or process within a project. It should be seamlessly integrated into a project as part of the decision-making process. Engagement works together with project management best practices and relies on communications for its success. As such, the most successful engagement efforts will be a result of teamwork.

Roles and responsibilities

Good engagement requires the involvement of many different roles within a project and a coordinated effort between the project manager, communications and the Engage Resource Unit.

The first step in the engagement process is for the project manager, along with the communicator, to complete the Engage Assessment Tool in the Project Initiation stage (or earlier) so that an engagement plan and budget can be incorporated into the project plan.

The Engage Assessment Tool (Appendix B) has been designed to determine whether engagement is required on a project. If it's required, the tool will also investigate the complexity of the project and the impact it will have on citizens and stakeholders and who will be responsible for approving the engagement strategy.

Here are the three levels of approving authorities:

- ▶ For projects of **low level impact and complexity**, the Project Sponsor will approve the engagement strategy.
- ▶ For projects of **medium level impact and complexity**, the Director of the Business Unit will approve the engagement strategy.
- ▶ For projects of **high level impact and complexity**, the General Manager of the Department will approve the engagement strategy.

Upon completion of the Engage Assessment Tool, the project manager or communicator should send the completed form to the Engage Resource Unit (at engage@calgary.ca) in order to begin the engagement process, or to record the reason engagement is not required.

From there, the roles in the process look like this:

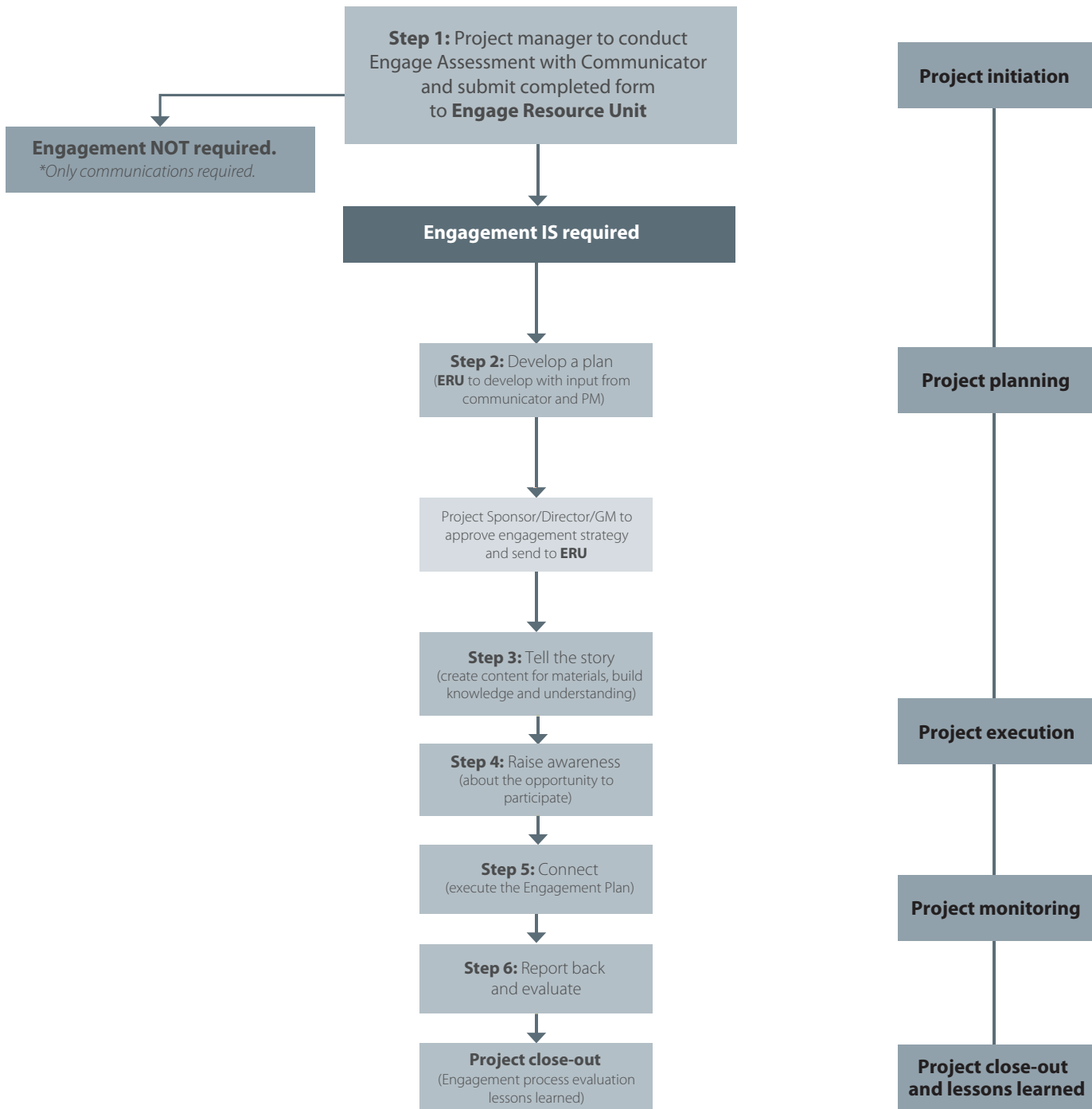
STEP 2	Develop a plan	Lead: Engage Resource Unit Support: project manager and communicator
STEP 3	Tell the story	Lead: Engage Resource Unit Support: communicator and project manager
STEP 4	Raise awareness	Lead: cOommunicator Support: Engage Resource Unit and project manager
STEP 5	Connect	Lead: Engage Resource Unit Support: project manager and communicator
STEP 6	Report back and evaluate	Lead: Engage Resource Unit Support: project manager and communicator

A workflow diagram (Figure 2) has been provided on the next page to show how these roles work together through each step in the engagement process.

For a breakdown specific to roles and responsibilities, see Appendix D.

Figure 2:

Engagement workflow



Alignment with other City processes

The City's Engage Process is integral to our operations and should be a part of the processes we already use. As you can see in Figure 2, page 9, the Engage Process is designed to align with the Corporate Project Management Framework, making it easier to build engagement steps into project plans.

The Engage Process also relies on The City's Integrated Risk Management system to identify and mitigate risks when developing an engagement strategy.

Engagement planning will also consider other City processes and Policies such as:

- ▶ Issues Management
- ▶ Triple Bottom Line
- ▶ Plain Language Policy # CS014
- ▶ Calgary Corporate Accessibility Policy #CSPS003
- ▶ Welcoming Community Policy #CSP034

This is not an exhaustive list as the relevant processes and policies may be dependent on the type of project.

Training and support

To ensure we are doing a better job at engaging our citizens and stakeholders, we all need to have the same understanding and expectations of engagement and the Engage Framework. Training on the Framework and Tools will be provided to communicators, project managers and project sponsors on an ongoing basis to support them in their engagement efforts.

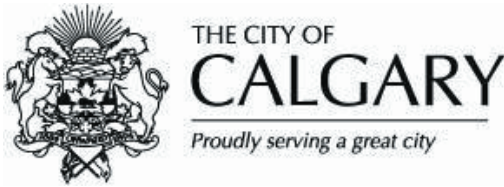
The Engage Resource Unit is available anytime for support and consultation. You can reach us at engage@calgary.ca

Engagement tools

The City has developed a suite of tools to help staff succeed in their engagement activities.

The Engage Framework tools are briefly outlined below.

TOOL	DESCRIPTION	WHO SHOULD USE THIS TOOL
Engage Assessment	This tool will help you determine if engagement is required for your project, and will outline the approval level and next steps.	The project manager should complete the Assessment with input from the department or business unit communicator and submit the completed form to the Engage Resource Unit.
Engage Process	These are the steps to follow to execute a good engagement process.	The engagement lead will follow these steps when executing an engagement process.
Spectrum of Strategies and Promises	This tool will help clarify at what level each stakeholder will be involved.	The engagement lead, in consultation with the project manager and communicator, will determine the level(s) of engagement.
Roles and Responsibilities	This tool will help clarify who is responsible for specific tasks in the engagement process.	Any City staff should refer to this document for role clarification.
Guiding Principles	The Guiding Principles document (Appendix E) lays out The City's engagement values of accountability, inclusiveness, transparency, commitment and responsiveness, offering various strategies to consider when getting started, and to keep in mind as the engagement process proceeds.	All City staff should all follow the guiding principles.



COUNCIL POLICY

Policy Title:	Engage Policy
Policy Number:	CS009
Report Number:	PFC2013-0235
Approved by:	City Council
Effective Date:	2013 May 27
Business Unit:	Customer Service and Communications

BACKGROUND

The City of Calgary (Council and Administration) recognizes that decisions are improved by engaging citizens and other stakeholder groups where appropriate. Within The City's ability to finance and resource, The City commits to conduct transparent and inclusive engagement processes that are responsive and accountable.

PURPOSE

The Engage Policy provides the guidelines for the development and implementation of engagement processes for stakeholders, both external and internal, in order to achieve the following:

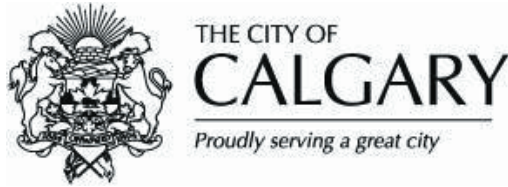
- alignment with City Council's priorities for citizen-centric service delivery
- support for City Council's decision making by providing information about stakeholders' opinions and perspectives
- consistent and clear engagement practices
- enhancement of The City of Calgary's reputation as an organization that listens to citizens and stakeholders

Administration is directed to develop and adhere to the Engage Administration Framework – outlining how The City's commitment to engagement will be carried out, how it will be resourced, and how accountability will be managed.

POLICY

Definitions

"Engagement" at The City of Calgary is defined as: purposeful dialogue between The City and citizens and stakeholders to gather information to influence decision making.



COUNCIL POLICY

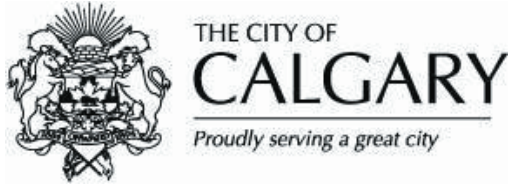
“Stakeholders” for the purpose of this policy are defined as anyone (person or group of people) who can impact or can be impacted by the results of a decision made by The City, and may include: citizens, the public, customers, businesses, community organizations and partners, other government agencies and any other body interacting with The City.

Engage Guiding Principles

The City of Calgary assigns a high priority to appropriately involving citizens and other stakeholders early on and throughout the process, especially when the decision(s) impact their lives.

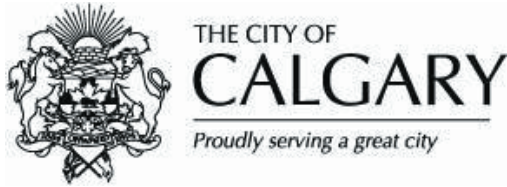
This policy incorporates the following five principles for guiding engagement initiatives:

1. **Accountability** – The City upholds the commitments it makes to citizens and stakeholders and demonstrates that results and outcomes of the engagement processes are consistent with the approved plans for engagement.
 - Stewardship of the Engage Policy lies with Council.
 - The City Manager, and General Managers and/or designates, are responsible for adherence to the Engage Policy and stewardship of the Engage Administration Framework.
 - The City’s project managers and work leads are responsible for the correct and thorough completion of The City’s engagement processes, as directed in the Engage Administration Framework.
 - Customer Service & Communications is responsible for the development and maintenance of the Engage Administration Framework, including The City’s processes, tools, training and data archives with respect to engagement.
2. **Inclusiveness** – The City makes its best efforts to reach, involve and hear from those who are impacted directly or indirectly.
 - Opportunities are provided for citizens and stakeholders to get involved at the beginning and throughout a City project or initiative when decisions will impact their lives.
 - Best efforts are made to accommodate diverse needs and backgrounds including those in accordance with CSPS003 Calgary Corporate Accessibility Policy and CSPS034 Welcoming Community Policy.



COUNCIL POLICY

- Opportunities are provided to create shared visions embraced by diverse interests.
3. *Transparency* – The City provides clear, timely and complete information, and endeavours to ensure decision processes, procedures, and constraints are understood and followed.
- The promise, purpose and limitations on engaging citizens and stakeholders are made clear.
 - The roles and responsibilities of all parties are clearly communicated.
 - Citizens and stakeholders are provided with relevant background and context about the project or work requiring engagement, as well as information about how to participate in the engagement process.
 - The City communicates to citizens and stakeholders:
 - what was heard – sharing input received, and
 - how input was considered, or why input was not used, in decision making.
4. *Commitment* – The City, within its ability and work plans, allocates sufficient resources for effective engagement.
- Business Units identify appropriate funding and resources for engagement processes within business plans for capital and operational work.
 - Customer Service & Communications develops and delivers training to support effective engagement across The City, specific to roles and responsibilities of The City’s engagement processes.
 - Stakeholder time and resources are respected and used effectively.
5. *Responsiveness* – The City of Calgary endeavours to understand citizen and stakeholder concerns.
- Timely information is provided to citizens and stakeholders about opportunities for input via channels that best suit the audience.



COUNCIL POLICY

- Feedback is collected and delivered to citizens and stakeholders in order to share input on both engagement processes and outcomes.
- The City is receptive to hearing the views of citizens and stakeholders.

PROCEDURE

Application of the Engage Policy

This policy applies to the following types of opportunities for engagement that exist within The City:

- Engagement in specific planning, policy, and project initiatives that directly or indirectly impact citizens and stakeholders.
- Mandated/legislated processes involving public participation.

Administration of the Engage Policy

Customer Service & Communications has the following responsibilities:

- Develop and keep current the Engage Administration Framework.
- Provide internal training and build familiarity with the Engage Policy and Engage Administrative Framework.
- Provide advice regarding engagement process design.
- Provide support to Council, staff, civic partners, citizens and stakeholders with regards to engagement expertise and process stewardship for consistent application of this policy.
- Advocate for, coordinate, and link engagement activities, standards and practices across The City through the Engage Administration Framework.

Spectrum of Strategies and Promises

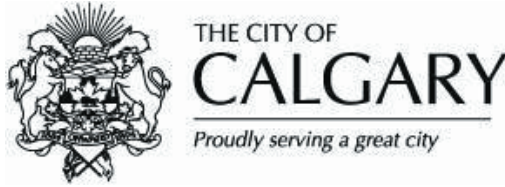
This policy includes a spectrum of four strategies and associated promises related to reaching and involving citizens and stakeholders in specific engagement initiatives. Whenever The City embarks on an engagement process, the purpose of the engagement and the 'promise' will be clarified at the beginning of the process. The Inform/Communicate tasks are required for all engagement initiatives at The City. The processes and details of how to conduct engagement will be outlined in the Engage Administration Framework.



THE CITY OF
CALGARY
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COUNCIL POLICY

INFORM / COMMUNICATE				
<p>The City will provide context and background information (for all levels of engagement) to assist citizens and stakeholders in understanding issues, problems, alternatives and / or solutions, and services we provide. Our commitment is to:</p> <ul style="list-style-type: none"> • Provide information that is timely, accurate, balanced, objective, and easily understood. • Respond to questions for clarification and direct citizens and stakeholders to sources of additional information. • Share with stakeholders what we heard from them. • Share with stakeholders if the input cannot be used in making the decision and the reasoning for why it may not be used. • Share how the input was factored into the decision. 				
	Listen & Learn	Consult	Collaborate	Empower
Strategy	Stakeholders and The City listen to and learn about each others' views, plans, concerns, and expectations.	Stakeholders' feedback is obtained through consultation to analyze issues and build alternatives, and thereby make contributions to the decision-making process. Consulting with stakeholders ensures issues and concerns are understood and considered.	Stakeholders are considered partners in the decision-making process, including collaboration on analyzing issues, building alternatives, identifying preferred solutions and making recommendations.	Aspects of the decision-making process are delegated to stakeholders.
Promise	We will listen to stakeholders and learn about their plans, views, issues, concerns and expectations and ideas	We will consult with stakeholders to obtain feedback and ensure their input is considered and incorporated to the maximum extent possible. We undertake to advise how consultation impacted the decisions and outcomes.	We will partner with stakeholders in a process that results in joint recommendations. We undertake to advise how collaboration impacted decision making.	Where legislation permits, we will abide with the decisions made under delegated authority. Where legislation precludes making such a commitment in advance, we undertake to be guided by the outcome.



COUNCIL POLICY

AMENDMENTS

2003 New Policy

2010 - Revisions to policy. Policy number changed from FCS002 to CS009 due to department reorganization

2013 May 27 (PFC2013-0235)

Engage Assessment

Purpose

The Engage Assessment, illustrated in these pages, is a four-step process designed to help you navigate and develop a consistent approach to engagement in the work conducted by The City of Calgary in accordance with the Engage Policy (CS009).

Information from this Engage Assessment may be used in whole or in part for future project reports to indicate how the decision to engage or not and/or depth and breadth of engagement were determined.

Outcome

By completing the Engage Assessment, you will be able to determine:

- ▶ If engagement is required.
- ▶ The actions and responsibilities with respect to the engagement process.
- ▶ The steps to be taken as per the Engage Framework.
- ▶ Approval levels for your engagement plan.

The Engage Assessment includes four steps:

STEP 1 – Project definition and engagement consideration

This step will help define your project; what areas are open for input from stakeholders and citizens, and if engagement is required for the project.

STEP 2 – Assess degree of engagement

This step will assess the level of impact and complexity of the project and illustrate next steps.

STEP 3 – Actions and responsibilities

This step will explain who will be responsible for approving the engagement strategy.

STEP 4 – Engage Assessment approval

It has been determined the level and complexity that will/will not be required for your project. Once you have obtained proper sign-off from your project sponsor, please submit to engage@calgary.ca for records maintenance and/ or follow-up support.

NOTE – *This tool is designed to be completed by the project manager, in collaboration with the communicator.*

STEP 1 - Project definition and engagement consideration

Before you start – this assessment tool can be submitted electronically if completed in Adobe Acrobat or Internet Explorer.

A. PLEASE ANSWER THE FOLLOWING QUESTIONS:

1 What is the project/initiative?

2 What is the planned outcome of the project/issue? (i.e. A new policy; an amendment to an existing policy; changes to an existing process; a land or transportation action or decision.)

3 Are there decisions that will be open to input from stakeholders and citizens? If yes, what are they? *If decisions are not open to input, engagement is not appropriate for your project. Please explain why decisions are not open to input here.

4 What are the decisions that have already been made?

5 Have any promises been made about stakeholder and citizen involvement? If yes, please explain.

** If decisions are not open to input, please complete step 4 and provide this Assessment to the Engage Resource Unit. Otherwise, please continue with the questions below.*

B: PLEASE ANSWER YES OR NO:**YES / NO**

Is there potential for stakeholders and citizens to be impacted by the outcomes of the project/initiative?

Is there specific Council direction for engagement with stakeholders and/or citizens for this project/initiative?

Is there legislation or regulation requiring engagement for this project/initiative?

If the answer to any of the questions in Section B is "yes", engagement is required for your project. Please continue to Step 2 on the next page.

STEP 2 - Assess impact and complexity of the project

IMPACT	Number 1 ASSIGN 1 POINT FOR EACH BOX CHECKED	Number 2 ASSIGN 2 POINTS FOR EACH BOX CHECKED	Number 3 ASSIGN 3 POINTS FOR EACH BOX CHECKED
Project type	<input type="checkbox"/> standard/routine	<input type="checkbox"/> unique/pilot	<input type="checkbox"/> precedent setting/multiple phases/new program or service
Project duration	<input type="checkbox"/> 3 months to 1 year	<input type="checkbox"/> 1-3 years	<input type="checkbox"/> 3+ years
Community impact	<input type="checkbox"/> Less than two communities or organizations	<input type="checkbox"/> 3-10 communities or organizations	<input type="checkbox"/> 10+ communities or organizations
Internal impact	<input type="checkbox"/> Within a business unit or department	<input type="checkbox"/> Multiple business units within one department	<input type="checkbox"/> Within multiple business units and across multiple departments
Stakeholder ability to impact decisions (Refer to Spectrum of Strategies and Promises)	<input type="checkbox"/> Listen and learn	<input type="checkbox"/> Consult	<input type="checkbox"/> Collaborate and/or empower
Add up the total points in each column	Total points:	Total points:	Total points:

If your total points are between: 5-7: Your Impact Number is **1**
 8-12: Your Impact Number is **2**
 13-15: Your Impact Number is **3**

Total points: _____

Impact Number: _____

COMPLEXITY	Letter A ASSIGN 1 POINT FOR EACH BOX CHECKED	Letter B ASSIGN 2 POINTS FOR EACH BOX CHECKED	Letter C ASSIGN 3 POINTS FOR EACH BOX CHECKED
What is the political sensitivity of this project or decision?	<input type="checkbox"/> Little attention – project or decision unlikely to be a public issue.	<input type="checkbox"/> There has been some attention. Some disagreement or differing of opinions is anticipated.	<input type="checkbox"/> Highly sensitive topic – either currently or anticipated.
How inclined will citizens and stakeholders be to accept this project or decision?	<input type="checkbox"/> The stakeholders are not likely to be concerned.	<input type="checkbox"/> Some issues are anticipated.	<input type="checkbox"/> There are many issues or there is at least one stakeholder group that is opposed.
Based on what you know, what do you anticipate will be the level of disagreement between stakeholder groups?	<input type="checkbox"/> No disagreement or can be easily managed.	<input type="checkbox"/> There will be a few competing positions – but can be managed with some effort.	<input type="checkbox"/> Competing positions by multiple stakeholder groups or more than a few different strongly held positions.
Add up the total points in each column	Total points:	Total points:	Total points:

If your total points are between: 3-4: Your Complexity Letter is **A**
 5-7: Your Complexity Letter is **B**
 8-9: Complexity Letter is **C**

Total points: _____

Complexity Letter: _____

STEP 3 - Actions and responsibilities

Combine your Impact Number and Complexity Letter from **Step 2** and find the corresponding box below.

Complexity Letter/Number Combination: _____

Degree of complexity ↑ HIGH MEDIUM ↓ LOW	1C: Low impact, high complexity	2C: Medium impact, high complexity	3C: High impact, high complexity
	▶ Engage Strategy Approval Level: Director ▶ Budget: \$\$	▶ Engage Strategy Approval Level: General Manager ▶ Budget: \$\$\$	▶ Engage Strategy Approval Level: General Manager ▶ Budget: \$\$\$
	1B: Low impact, medium complexity	2B: Medium impact, medium complexity	3B: High impact, medium complexity
	▶ Engage Strategy Approval Level: Project Sponsor or Manager ▶ Budget: \$	▶ Engage Strategy Approval Level: Director ▶ Budget: \$\$	▶ Engage Strategy Approval Level: General Manager ▶ Budget: \$\$\$
	1A: Low impact, low complexity	2A: Medium impact, low complexity	3A: High impact, low complexity
	▶ Engage Strategy Approval Level: Project Sponsor or Manager ▶ Budget: \$	▶ Engage Strategy Approval Level: Project Sponsor or Manager ▶ Budget: \$	▶ Engage Strategy Approval Level: Director ▶ Budget: \$\$
	← LOW	← MEDIUM	← HIGH →
	Degree of impact		

STEP 4 - Engage Assessment approval

Please review the completed Engage Assessment Tool with your project sponsor.

If your sponsor has an electronic signature have them sign before submitting. If they do not, please submit the form electronically, without signature, before printing and signing for your file.

The completed tool can be submitted to the Engage Resource Unit via the button below, or by emailing engage@calgary.ca.

<p>The Engage Assessment Tool indicates engagement is required. This form is being submitted to begin the project intake process.</p>	<input type="checkbox"/> Yes, engagement is required.	<input type="checkbox"/> No, engagement not required. <i>Comments</i>
<p>Project name:</p> <p>Business unit:</p> <p>Project start date:</p> <p>Project contact:</p> <p>Role: Project manager</p> <p>Contact email:</p> <p>Form completion date:</p>	<p>Project Sponsor Name:</p> <p>Title:</p> <p>Contact email:</p> <p>Electronic signature (if available):</p>	
<p>Additional comments: Please provide any additional comments.</p>	<p>Tell us about the tool:</p> <p>How did you find out about the Engage Assessment tool?</p> <p>Are the instructions for this tool clear and easy to understand?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Did this tool give you a better understanding of whether engagement was required for your project?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	

Spectrum of strategies and promises

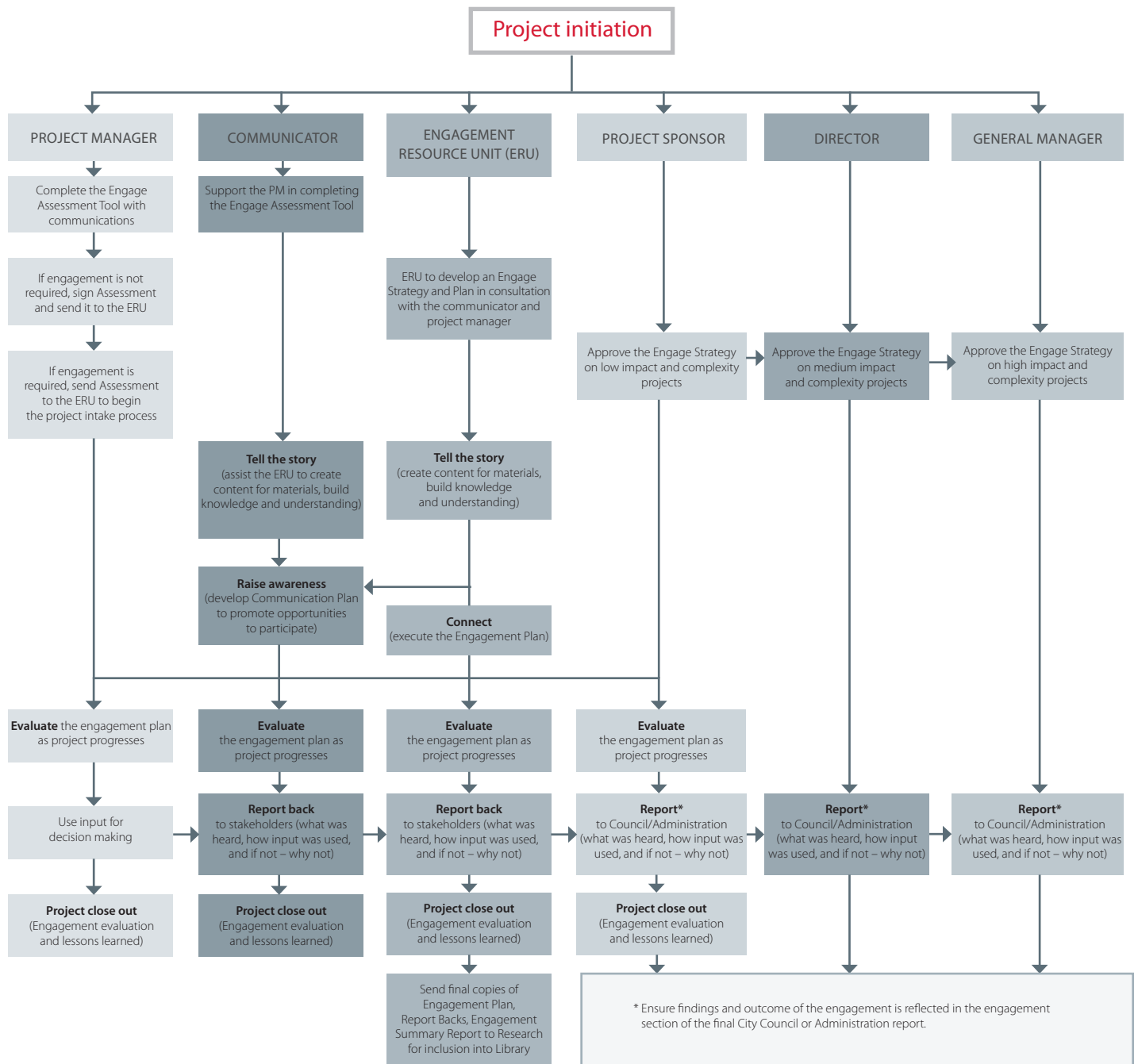
Inform/communicate

The City will provide context and background information (for all levels of engagement) to assist citizens and stakeholders in understanding issues, problems, alternatives and/or solutions, and services we provide. Our commitment is to:

- ▶ Provide information that is timely, accurate, balanced, objective, and easily understood.
- ▶ Respond to questions for clarification and direct citizens and stakeholders to sources of additional information.
- ▶ Share with stakeholders what we heard from them.
- ▶ Share with stakeholders if the input cannot be used in making the decision and the reasoning for why it may not be used.
- ▶ Share how the input was factored into the decision.

	Strategy	Promise
LISTEN AND LEARN	Stakeholders and The City listen to and learn about each others' views, plans, concerns, and expectations.	We will listen to stakeholders and learn about their plans, views, issues, concerns, expectations and ideas.
CONSULT	Stakeholders' feedback is obtained through consultation to analyze issues and build alternatives, and thereby make contributions to the decision-making process. Consulting with stakeholders ensures issues and concerns are understood and considered.	We will consult with stakeholders to obtain feedback and ensure their input is considered and incorporated to the maximum extent possible. We undertake to advise how consultation impacted the decisions and outcomes.
COLLABORATE	Stakeholders are considered partners in the decision-making process, including collaboration on analyzing issues, building alternatives, identifying preferred solutions and making recommendations.	We will partner with stakeholders in a process that results in joint recommendations. We undertake to advise how collaboration impacted decision making.
EMPOWER	Aspects of the decision making process are delegated to stakeholders.	Where legislation permits, we will abide with the decisions made under delegated authority. Where legislation precludes making such a commitment in advance, we undertake to be guided by the outcome.

Engagement roles and responsibilities



Guiding principles

The City of Calgary assigns a high priority to appropriately involving citizens and other stakeholders early on and throughout the process, especially when the decision(s) impacts their lives.

The Engage Policy incorporates the following five principles for guiding engagement initiatives:

Guiding principle	Strategies and promises
<p>ACCOUNTABILITY</p> <p>The City upholds the commitments it makes to citizens and stakeholders, and demonstrates that results and outcomes are consistent with the approved plans for engagement.</p>	<ul style="list-style-type: none"> ▶ Stewardship of the Engage Policy lies with Council. ▶ The City Manager, and General Managers and/or designates, are responsible for adherence to the Engage Policy and stewardship of the Engage Administration Framework. ▶ The City's project managers and work leads are responsible for the correct and thorough completion of The City's engagement processes, as directed in the Engage Administration Framework. ▶ Customer Service & Communications is responsible for the development and maintenance of the Engage Administration Framework, including The City's processes, tools, training and data archives with respect to engagement.
<p>INCLUSIVENESS</p> <p>The City makes its best efforts to reach, involve and hear from those who are impacted directly or indirectly.</p>	<ul style="list-style-type: none"> ▶ Opportunities are provided for citizens and stakeholders to get involved at the beginning and throughout a City project or initiative when decisions impact their lives. ▶ Best efforts are made to accommodate diverse needs and backgrounds, including those in accordance with Calgary Corporate Accessibility Policy CSPA003 and Welcoming Community Policy CSPA034. ▶ Opportunities are provided to create shared visions embraced by diverse interests.
<p>TRANSPARENCY</p> <p>The City provides clear, timely and complete information, and endeavours to ensure decision processes, procedures and constraints are understood and followed.</p>	<ul style="list-style-type: none"> ▶ The promise, purpose and limitations on engaging citizens and stakeholders are made clear. ▶ The roles and responsibilities of all parties are clearly communicated. ▶ Citizens and stakeholders are provided with relevant background and context about the project or work requiring engagement, as well as information about how to participate in the engagement process. ▶ The City communicates to citizens and stakeholders: <ul style="list-style-type: none"> ▷ What was heard – sharing input received; and ▷ How input was considered, or why input was not used, in decision-making.
<p>COMMITMENT</p> <p>The City, within its ability and work plans, allocates sufficient resources for effective engagement.</p>	<ul style="list-style-type: none"> ▶ Business Units identify appropriate funding and resources for engagement processes within business plans for capital and operational work. ▶ Customer Service & Communications develops and delivers training to support effective engagement across The City, specific to roles and responsibilities of The City's engagement process. ▶ Stakeholder time and resources are respected and used effectively.
<p>RESPONSIVENESS</p> <p>The City of Calgary endeavours to understand citizen and stakeholder concerns.</p>	<ul style="list-style-type: none"> ▶ Timely information is provided to citizens and stakeholders about opportunities for input via channels that best suit the audience. ▶ Feedback is collected and delivered to citizens and stakeholders in order to share input on both engagement processes and outcomes. ▶ The City is receptive to hearing the views of citizens and stakeholders.