



Engage Resource Unit

Research and Engagement Library // Document Overview

Document Overview

Project Name: **Corridor Study Terms of Reference Policy**

Document Type: Engagement Plan or Strategy

<p>What is an Engagement Plan or Strategy?</p> <p><i>A document that outlines the objectives for conducting engagement, who we planned to engage with and what engagement activities were planned.</i></p>	<p>What is a What we Heard Report?</p> <p><i>A document that outlines the feedback that was heard through an engagement process.</i></p>	<p>What is a Final Summary Report?</p> <p><i>A document that describes the purpose for engagement, who we talked to, and how their input was used by The City to help make decisions.</i></p>
<p>Why are we engaging?</p>	<p>To create a new Corridor Study Terms of Reference Policy.</p>	
<p>What stakeholders are involved?</p>	<p>City Council, Transportation Planning, Transit, Transportation Infrastructure, Transportation Optimization, Community and Neighbourhood Services, Communications, Parks, Land Use Planning and Policy, Alberta Transportation, Federation of Calgary Communities, Community Associations, Chamber of Commerce, Development Industry Representatives, Calgarians.</p>	
<p>What are we talking to stakeholders about?</p>	<p>The creation of the policy while taking into consideration preservation of adjacent communities, minimization of negative impacts on adjacent land uses, and options for staging and prioritizing both interim and ultimate solutions.</p>	
<p>When did this engagement happen?</p>	<p>2013</p>	

Corridor Study Terms of Reference Policy Engagement Plan Outline (2013)

1. Project Scope

a. Purpose / Overview

The purpose of the project, as per Notice of Motion 2012-15, is to:

- Create a new Corridor Study Terms of Reference Policy that includes but is not limited to:
 - Preservation of the integrity of adjacent communities;
 - Identification of community improvements;
 - Minimization of negative impacts on adjacent land uses and open spaces;
 - Provides clear definitions of desired outcomes for movement onto, through and across the corridors for all transportation modes;
 - Options for staging and prioritizing both interim and ultimate solution projects within the corridor over time utilizing criteria such as community impacts, cost vs. benefits, traffic optimization techniques, and feasibility;
 - Develop a new community engagement and communications approach which collaborates with stakeholders utilizing the ENGAGE Policy of The City of Calgary;

What are the decision(s) being sought (Decision Statement)

1) What is the appropriate process for undertaking Corridor Studies?

What are the appropriate steps in the process? What type of information is needed in each step? What decisions are being sought in each step? Beyond the topics to be explored in a Terms of Reference Policy stated in NM2012-15, what other topics should be explored in Corridor Study processes? When in the process should other topics be explored?

2) What does a collaborative community engagement and communications approach for Corridor Studies look like?

How, when, and what do stakeholders want to be engaged on in future Transportation Corridor Study processes?

What decisions have been made and are not negotiable

- Move forward with the Corridor Study Terms of Reference Policy, because Council has issued NM2012-51, and Administration provided a response in TT2013-0212.

2. Situation Analysis (Environment Scan)

a. Council / Aldermen

- Lots of interest in Corridor Study project to date. Ald. Farrell and Mar have been actively sending updates to community representatives on the status and direction of the project.
- All wards are within the scope of the project.
- Ald. Farrell and Mar lead a NM2012-15, which received unanimous support from Council members.
 - Notice of motion directs Administration to “Collaborate” with stakeholders using The City’s engage policy

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- Ald. Mar: “Many people expressed concern of the images they saw at open house... create policy on corridors.”
- Ald. Farrell: “letter from Crowchild Communities Initiatives...”
- Quotes from the media:
 - “We don’t destroy communities any more for traffic. That’s the 1960s view and it was an outdated view then.” – Ald. Farrell (Metro News, Dec. 13, 2012).
 - “The notion to me of bulldozing homes to throw in more roads, I just can’t support that.” – Ald. Pincott (Metro News, Dec. 13, 2012).

b. Internal Stakeholders

- Main internal stakeholders will consist of Business Units that have been involved or have been involved in major Transportation projects.
- Challenge will be identifying individuals who have been involved in past projects to gain perspective and understanding about Transportation processes

c. External Stakeholders / Community Representatives

- Participants in the Crowchild Trail Corridor Study have expressed a high interest in participating in the project
- Other participants from past Transportation projects will be sought out to participate and lend perspective to the project
- Specific external stakeholder groups and the general public will be asked to participate throughout the project

3. Stakeholders

Decision-makers:

- Transportation Planning decides on recommended plan to report to Council while looking to stakeholders for advice and innovation in formulating solutions and incorporate the advice and recommendations into the decisions to the maximum extent possible.
- City Council decides on approval of recommended plan.

	Primary	Secondary
Internal	<ul style="list-style-type: none">• Aldermen• Transportation Planning• Transit• Transportation Infrastructure• Transportation Optimization• Community & Neighbourhood Services• Communications• Parks• Land Use Planning & Policy	<ul style="list-style-type: none">• ?
External	Government <ul style="list-style-type: none">• Alberta Transportation (i.e., Stoney Tr) Community / General Users	<ul style="list-style-type: none">• MLAs?

Corridor Study Terms of Reference Policy Engagement Plan Outline (2013)

	<ul style="list-style-type: none"> Federation of Calgary Communities Community Associations Participants from: <ul style="list-style-type: none"> Crowchild Trail Corridor Study 16 Avenue North Urban Corridor Study 17 Avenue SE Study Shaganappi Trail Corridor Study West LRT Study Cycling communities / cyclists Commuters – drivers, transit users <p>Business / Commercial</p> <ul style="list-style-type: none"> Chamber of Commerce Development Industry representatives Transportation groups 	
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4. Public Engagement Assessment

a) Stakeholders and Issues Assessment

Issue	The City's Evaluation: Impact Level N = None L = Low M = Moderate H = High U = Unknown	Stakeholders			
		Stakeholder Group	Concern Level N = None L = Low M = Moderate H = High U = Unknown	Geographic Frame of Reference	Contacts
Impact to properties (and property value) in constrained section	H	Section residents	H	Within 2-blocks east and west of current Shaganappi Trail in Varsity	
		Business owners	H	Along Shaganappi Trail within study area	
		Commercial landowners	H	Along Shaganappi Trail within study area	
Impact on traffic along Shaganappi	L	Commuters	H	All commuters along Shaganappi Trail	
Impact on traffic through communities	M	Commuters	L	All commuters along Shaganappi Trail	
		Community residents	H	Primarily Varsity residents	
Impact to community access to and from Shaganappi	M	Community residents	H	Primarily Varsity residents	
	M	Commuters	L	Commuters accessing Shaganappi through community	
Impact to transit operations	L	LUPP	M	Along Shaganappi Trail within study area	

Corridor Study Terms of Reference Policy Engagement Plan Outline (2013)

Issue	The City's Evaluation: Impact Level N = None L = Low M = Moderate H = High U = Unknown	Stakeholders			
		Stakeholder Group	Concern Level N = None L = Low M = Moderate H = High U = Unknown	Geographic Frame of Reference	Contacts
		Calgary Transit	M	Transit connections to area transit network	
		Current transit users	M	Transit connections to area transit network	
		Community residents	M-H	Transit connections to area transit network	
Impact on future land use and development	M	LUPP	H	Activity centre and future developments along Shaganappi Trail	
		West Campus	H	Section of Shaganappi between 32 & 16 Ave	
		Attainable Homes	H	NW corner of Varsity Dr & Shaganappi Trail	
Impact on pedestrian and cycling connectivity	M	Community residents	L	Along Shaganappi Trail	
		Cyclists	H	Along Shaganappi Trail	
Impact on health and environment	L	Section residents	H	Within 2-blocks east and west of current Shaganappi Trail in Varsity (potential construction area, traffic noise)	
		Community residents	M	Primarily Varsity residents	
		Alberta Health Services	U	Alberta Children's Hospital between 32 Ave & 24 Ave	

What are the disparities between internal and external stakeholder views? Is there an opportunity to refine the decision statement?

- Impact on traffic along Shaganappi Trail
- Impact on traffic through community (Varsity)
- Impact to community access to and from Shaganappi
- Impact to transit operations
- Impact on future land use and development
- Impact on health and environment

b) Public and Internal Expectations

See worksheets for details.

Corridor Study Terms of Reference Policy Engagement Plan Outline (2013)

Expectations of Key Participants	Inform	Listen & Learn	Consult	Collaborate	Empower
1. What level of public participation was forecasted by the sponsor prior to doing the assessment?				X (NoM states that this level is required)	
2. What level of public engagement do key stakeholders desire and/or expect (external)?				X (4.6)	
3. What level of public engagement do managers and technical staff support (internal)?		X (2.63)			
4. What level of public engagement do the decision makers support (internal)?				X	
Summary – What engagement level would be appropriate based on external and internal expectations?				X	

c) Engagement Benefits and Opportunities

Are there benefits or opportunities for some elements of the decision process to be at a higher engagement level?

Benefits

- Respond to what we heard from public open house feedback – desire for more information and to participate more meaningfully in engagement process.
- Provide opportunities for adjacent homeowners (most impacted stakeholders) to become more informed about the study, understand the decision(s) being sought, and to provide input.
- Demonstrate to stakeholders that The City is open to feedback, transparent about what we hear from citizens and what we do with the input we receive.

Opportunities

- Clearly inform stakeholders on the decision(s) being sought in this study.
- Provide information to help stakeholders understand the long-term, future transportation issues and concerns The City needs to address with the study.
- Enable stakeholders to listen and learn of The City's perspective, and other perspectives in the community, while considering future transportation needs along the corridor.

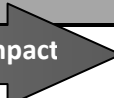
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5. Engagement Strategy

a. Public Engagement Goal (Select P2 level)

Collaborate throughout the process: To obtain stakeholder feedback on decision criteria, design alternatives and evaluation of alternatives.

Engagement Level	Decision Process Steps					
	Define Problem/ Opportunity	Gather Information	Establish Decision Criteria	Develop Alternatives	Evaluate Alternatives	Make Decision
Inform	X					X
Listen & Learn						
Consult		X?				
Collaborate			X	X	X	
Empower						

	Consult	Collaborate
Goal	Stakeholder 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 a preferred solution and making recommendations.
Promise	We will consult with stakeholders to obtain feedback and ensure their input is incorporated to the maximum extent possible . We undertake to advise how consultation affected the decisions and outcomes.	We will partner with stakeholders in a process that result in joint recommendations. We undertake to advise how collaboration affected decision-making.
Increasing level of public impact 		

b. Public Engagement Objectives

Decision Step	Level	Objective	Measure
Gather Information	Consult	<ul style="list-style-type: none"> Stakeholders are clear about what decisions are being sought (see Decision Statements) Use public input to supplement gathered information to ensure project decision reflects City and stakeholder values to the maximum extent possible. 	Majority respondents agree.
Establish decision criteria	Collaborate	<ul style="list-style-type: none"> Stakeholders are clear about what decisions are being sought (see Decision Statements) Work with stakeholders to finalize decision criteria to ensure project decision reflects City and stakeholder values to maximum extent possible. 	Majority respondents agree.

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Develop alternatives	Collaborate	<ul style="list-style-type: none"> Stakeholders are clear about what decision criteria will be used to evaluate alternatives. Work with stakeholders to eliminate/modify/fine-tune alternatives. Project team and Committee members can provide broader public with reasons why some input cannot be incorporated. 	Majority respondents satisfied/ somewhat satisfied with process.
Evaluate alternatives	Collaborate	<ul style="list-style-type: none"> Stakeholders are clear about how decision criteria are used to evaluate alternatives. Work with stakeholders to identify recommended option. Project team and Committee members can provide broader public with reasons why some input cannot be incorporated. 	Majority understand: 1) How input has been incorporated. 2) Why some input cannot be incorporated.
Make Decision	Inform	<ul style="list-style-type: none"> Stakeholders are clear about how decision criteria are used to evaluate alternatives. Stakeholders see how input was incorporated and where it was not, why. Stakeholders are clear about how the recommended concept best meets evaluation criteria. 	Majority understand: 1) How recommended concept best meets evaluation criteria.

c. Engagement Phases

The Engagement Strategy consists of three phases. The overall purpose of creating three phases is to work with stakeholders to mirror a similar process of engagement that is anticipated to be in the resulting Corridor Study Terms of Reference Policy. The high level details of the three phases are detailed in the table below.

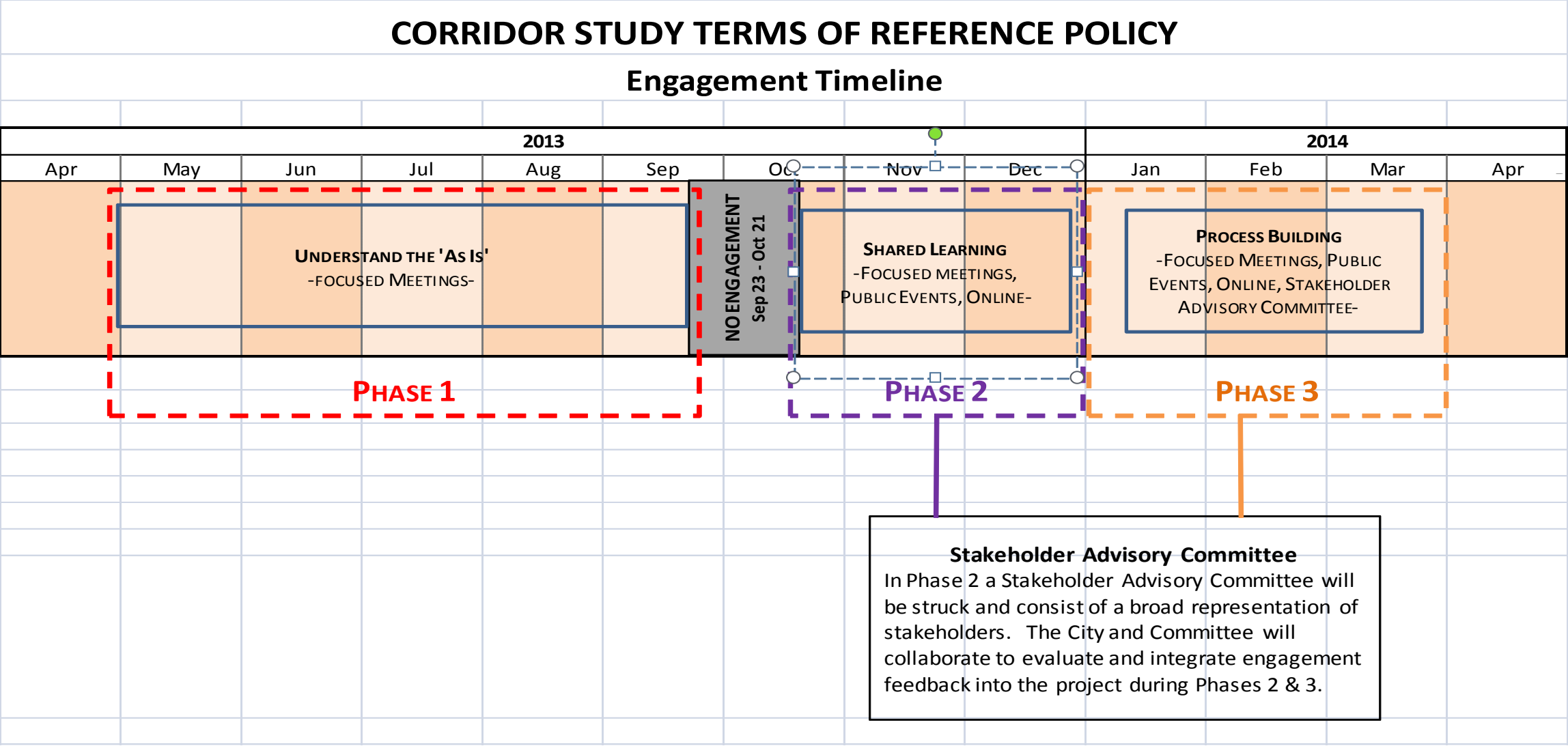
CORRIDOR STUDY TERMS OF REFERENCE POLICY -Engagement Phases-			
	Phase 1 – Understand the ‘As Is’	Phase 2 – Education	Phase 3 – Process Building
<i>Purpose</i>	Relationship building and understanding the experiences/perception of past transportation study participants.	Educate external stakeholders on transportation corridor study processes, engagement processes, report back from Phase 1 and begin moving forward on building processes	Work with stakeholders to build engagement/communications process by using decision making steps and identifying roles/responsibilities in each step of process.
<i>Questions</i>	What didn't work for you? What could we do better/What needs to change?	Does what we heard in Phase 1 make sense? What is missing/gaps? Does the Corridor Study process idea make sense, what is missing?	Do the decision making steps make sense? Anything missing? Who should be involved at what point? What are the roles and responsibilities of stakeholders in each step? What is negotiable/non-negotiable? How should people be involved?

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<i>Who</i>	External and internal participants in past transportation study processes.	General public, external and internal participants in past transportation study processes.	General public, external and internal participants in past transportation study processes.
<i>Methods</i>	Focused Meetings, Online	Focused Meetings, Public Events, Online	Focused Meetings, Public Events, Online, Stakeholder Advisory Committee
<i>Deliverables</i>	Report Back	Report highlighting ideas on new processes, Report Back (case studies & good practices completed prior to Phase 2), Stakeholder Advisory Committee sign-up	Report highlighting ideas on new processes, Report Back

Details of Phases 2 and 3 will be completed at a later date. The intent is to obtain feedback from stakeholders in Phase 1 that will help clarify the details in Phase 2 and 3. The timeline for the three Phases is below.

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The next section contains the details of Phase 1.

i. Phase 1 – Understand the ‘As Is’

The objective of Phase 1 is to understand the experiences and perceptions of external and internal past participants in Transportation project processes and create the foundation to move forward with Phase 2. The details of engagement for Phase 1 are detailed in the Table below.

PHASE 1 - UNDERSTAND THE 'As Is'		
Mid-June -Externally Focused Meetings-	July -Internally Focused Meetings-	Mid-September -Report Back Sessions-
<p>Purpose: Understanding the experiences and perceptions of past participants in Transportation project processes.</p> <p>Feedback questions: What didn't work for you? What could we do better? What needs to change? How do you want to be involved in projects in the future?</p> <p>Stakeholders: External participants from past transportation study processes . -Crowchild Trail Corridor Study -16 Avenue North Urban Corridor Study -17 Avenue SE Study -Shaganappi Trail Corridor Study -West LRT Study</p> <p>Deliverable: Report Back (Sept)</p>	<p>Purpose: Understanding the experiences and perceptions of past participants in Transportation project processes.</p> <p>Feedback questions: What didn't work for you? What could we do better? What needs to change? How do you want to be involved in projects in the future?</p> <p>Stakeholders: Internal participants from past transportation study processes . -Aldermen -Transportation Planning -Planning -Community & Neighbourhood Services -CSC - Communications -Parks</p> <p>Deliverable: Report Back (Sept)</p>	<p>Purpose: To reflect back to participants what was said in June-July and determine if there is anything missing.</p> <p>Feedback questions: Is there anything missing from the feedback based on what was captured previously? Does the feedback we have captured reflect what you said?</p> <p>Stakeholders: External and Internal participants in the process from June through August .</p> <p>Deliverable: Report Back (Nov)</p>

Engagement Techniques

Internal Stakeholders

External Stakeholders (See table below)

The techniques below address the following decision process steps:

- Establish Design Criteria
- Develop Alternatives
- Evaluate Alternatives (including the opportunity to create new alternatives)

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Phase 1: Understand the 'As Is' Engagement			
Events	Technique	Description	Objective
Externally Focused Meetings	Facilitated Meetings (multiple meetings, approx. 2 hours in length)	Attendees will participate in facilitated meetings that will introduce the project and ask about their experiences in past Transportation projects. Set-up: Facilitated small group discussions for stakeholders to talk with staff about their experiences in Corridor Studies	<ul style="list-style-type: none"> Provide project information to stakeholders so they clearly understand the decision being sought. Begin the process of stakeholder involvement and allow stakeholders to express their experiences in past Corridor Studies
Internally Focused Meetings	Facilitated Meetings (multiple meetings, approx. 2 hours in length)	Attendees will participate in facilitated meetings that will introduce the project and ask about their experiences in past Transportation projects. Set-up: Facilitated small group discussions for stakeholders to talk with staff about their experiences in Corridor Studies	<ul style="list-style-type: none"> Provide project information to stakeholders so they clearly understand the decision being sought. Begin the process of stakeholder involvement and allow stakeholders to express their experiences in past Corridor Studies
Workshop #2 (Developing Alternatives, Corridor Study Process and Engagement & Communications Approach)	Conversation Cafe Note: 2 sessions, optional 3 if required (Approx. 2 hours each)	Attendees will participate in facilitated dialogues based on topics and questions pre-determined by the project team around the creation. Attendees will provide comments and identify the themes that best reflect the comments from the group. Attendees discuss different topics in subsequent discussion rounds.	<ul style="list-style-type: none"> Gather stakeholder input on overall Corridor Study process – what steps are/not important, what other steps need to be considered (1 hour) Gather stakeholder input on a collaborative Engagement & Communications approach – what engagement and communications considerations are/not important in each step of the Corridor Study process, what other criteria need to be considered. (1 hour) Provide dialogue opportunities for project team members and stakeholders to collaborate from different stakeholder perspectives Solicit Stakeholder Advisory Committee applications
	Dotmocracy Exercise (Approx. 1 hour)	Attendees are divided into small groups to review suggested Corridor Study process changes, and Engagement & Communications approaches while considering the themes identified in the Conversation Cafe exercise. Attendees generate new ideas on worksheets, where other participants can indicate the preference for the idea and explain	<ul style="list-style-type: none"> Gather stakeholder input on – Which of the suggested changes to the Corridor Study process and approaches to Engagement & Communications do stakeholders like/dislike and why? What other ideas should be considered? Solicit Stakeholder Advisory Committee

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		why. The highest ranked / most favourable ideas determined by stakeholders will be <u>considered</u> by The City and stakeholders will be advised on how collaboration affected decision making.	applications
	Online, Email to contact list	A summary and verbatim compilation of the themes generated at these sessions. Provide displays and feedback form online for people to make additional comments for a 2 week period.	<ul style="list-style-type: none"> Report back on what was heard from stakeholder input in an open, transparent and timely manner.

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Conversation Topics for External Stakeholders

Example topics may include the following. Topics and discussion questions require further input from project manager and consultants.

- Decision making processes
- Corridor Study processes that include, but are not limited to:
 - Preservation of the integrity of adjacent communities;
 - Identification of community improvements;
 - Minimization of negative impacts on adjacent land uses and open spaces;
 - Provides clear definitions of desired outcomes for movement onto, through and across the corridors for all transportation modes;
 - Options for staging and prioritizing both interim and ultimate solution projects within the corridor over time utilizing criteria such as community impacts, cost vs. benefits, traffic optimization techniques, and feasibility;
- Engagement and communications approaches for Corridor Study processes

Key messages for Public Engagement

- Feedback from the public open house indicated that area citizens want to have more information and more time to consider design concepts to provide meaningful input to the study.
- The City heard that area citizens' desire more opportunities for input, and is providing opportunities for citizens to get more involved in the study.
- A consultation level of engagement means input will be considered and incorporated to the maximum extent possible.
 - There may be input that cannot be incorporated.
 - The City will report back on how input was incorporated, and where it could not be incorporated, why.
- The City is consulting stakeholders for input that will be used to:
 - 1) Narrow and refine design options for evaluation.
 - 2) Finalize evaluation criteria for decision making.
- The City and consultants will evaluate the design concepts based on the finalized evaluation criteria (with stakeholders' input). Evaluation results will be reported back to stakeholders.
- **One of many inputs**

Media Relations

Spokesperson

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Tactics & Timelines

Decision Step	Stakeholders	Engagement Level	Engagement Objective	Technique	Communication Materials	Timeline	Responsible	Status
Define problem/opportunity	All stakeholders	Inform		Project web page, Email to key stakeholders	Project launch material, Stakeholder Advisory Committee application	May 2013		
Gather information	Internal	Listen & Learn	Gather background information from relevant internal stakeholders for presentation to external stakeholders	Meeting and comment form	email	April/May 2013		
	External groups	Consult	Gather input that will help clarify any outstanding issues from past Corridor Study processes	Public Launch events (Open House with presentation)	Newsletters, email, PSA, Invite, PPT presentation, agenda, summary, feedback form	June 2013		
	External individual stakeholders	Consult	Gather input that will help clarify any outstanding issues from past Corridor Study processes	Public Launch events (Open House with presentation)	Newsletters, email, PSA, Invite, PPT presentation, agenda, summary, feedback form, Stakeholder Advisory Committee application	June 2013		
Establish decision criteria	External Stakeholders (All)	Collaborate	Work with stakeholders to develop draft decision	Workshop #1 (Presentation, Conversation	Invite, CA newsletter ad, bold signs,	June 2013		

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			criteria options for Corridor Study processes and Engagement & Communications approach.	Café, Dotmocracy)	posters, City website, social media and blog, agenda, draft decision criteria, key questions, feedback form, summary			
	Stakeholder Advisory Committee	Collaborate						
Develop alternatives	External Stakeholders (All)	Collaborate	Work with stakeholders to develop draft alternatives for Corridor Study processes and Engagement & Communications approach.	Workshop #2 (Presentation, Conversation Café, Dotmocracy)	Invite, CA newsletter ad, bold signs, posters, City website, social media and blog, agenda, draft decision criteria, key questions, feedback form, summary	June 2013		
	Stakeholder Advisory Committee	Collaborate	Work with the Committee to					

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Evaluate alternatives	External Stakeholders (All)	Collaborate	Work with stakeholders to refine and select preferred alternatives for Corridor Study process and Engagement & Communications approach.	Workshop #3 (TBD)	Invite, CA newsletter ad, bold signs, posters, City website, social media and blog, agenda, draft decision criteria, key questions, feedback form, summary	November 2013		
	Stakeholder Advisory Committee	?	?	?	?			
Make decision	Internal (All)	Inform	Present recommended plans.	Meeting with presentation and/or email update.	Invite, presentation, meeting summary	Winter 2014	Amanda – all materials Peggy/Lei – review/approve materials	
	External	Inform		Project web page	Update via email, website.	Winter 2014	Amanda – all materials Peggy website updates Peggy/Lei – review/approve materials	
	All stakeholders	Inform		Project web page	Update via email, website and notice to key landowners	Winter 2014	Amanda – all materials Peggy website updates Peggy/Lei – review/approve materials	

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*Comment: At this stage, the level of engagement is more likely at Listen & Learn – it's unlikely that the project team will "go back to the drawing board." Also, stakeholders have already been consulted on how alternatives are to be evaluated (i.e., evaluation criteria) in previous engagement. Now, it's applying those criteria to the alternatives, and stakeholders seeing what the application of those criteria mean.