



Document Overview

Project Name: Mosquito/ Hurricane Aircraft Project

Document Type: Engagement Plan or Strategy

<p>What is an <b>Engagement Plan</b> or <b>Strategy</b>?</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 <b>What we Heard Report</b>?</p> <p><i>A document that outlines the feedback that was heard through an engagement process.</i></p>	<p>What is a <b>Final Summary Report</b>?</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 examine options for the future of the Mosquito and Hurricane aircrafts owned by The City of Calgary, i.e. whether to donate, loan, sell or keep each of the aircrafts. Additionally to establish and execute a credible Request for Proposal process for the selling/ restoration of the aircrafts.</p>	
<p>What stakeholders are involved?</p>	<p>Civic Leaders (Mayor, City Council), Project Team, Project Sponsor, Aero Space Museum, Calgary Heritage Authority, Alberta Museums Association, Provincial Government, Potential buyers/ restorers, Canadian Aeronautical Preservation Association, Canadian Heritage, Media, Veterans Groups, Citizens.</p>	
<p>What are we talking to stakeholders about?</p>	<p>Options for the future of the Mosquito and Hurricane aircrafts owned by The City of Calgary, i.e. whether to donate, loan, sell or keep each of the aircrafts.</p>	
<p>When did this engagement happen?</p>	<p>June 2008 – Mid 2009</p>	



# Engagement Resource Unit Engagement Plan

MAY 12, 2008

**Mosquito/Hurricane Aircraft Project**

## Background

In June 2007, in an in-camera session, Council approved the sale of the City-owned Mosquito aircraft in camera. The sale was to remain confidential until the transaction was finalized and a report outlining the Aerospace Museum's investment plans had been completed.

However, information on the sale was leaked and some members of the public voiced considerable opposition. For example, Alderman Mar reported receiving 70 emails in opposition to the sale. Correspondence was also sent to the Mayor and members of Administration. Beyond opposition of the sale, concerns were raised regarding the perceived "secretive" nature of Council's decision-making process. Media coverage also echoed these concerns. In response, Council reconsidered its decision and in March 2008 called for Administration to explore further options (following a recommendation from the Community and Protective Services SPC).

## Project Definition

The **objectives** of the project are two-fold. The first objective is to examine options for the future of the Mosquito and Hurricane aircrafts owned by The City, i.e. whether to donate, loan, sell or keep each of the aircrafts. The second objective is to establish and execute a credible Request for Proposal (RFP) process for the selling/restoration of the aircrafts (the selling/restoration options to be determined by Council).

A report will be submitted to Council in September outlining the possible future options for the Mosquito and Hurricane based on analysis of the cultural and historical significance of the two aircrafts. Council will be asked to make a decision on which options should form the basis of the terms for the RFP. Following this decision, the project team will open the RFP process to national and international bidders. An independent review panel will assess the RFPs with the results being submitted to Council for a final decision (most likely in early 2009).

This engagement plan is for the period of May 2008 through mid 2009 (and will need to be revised and refined periodically throughout the project).

The Project Sponsor is the General Manager of Community Services and Protective Services Erika Hargesheimer. The project lead is Gerry Laing, Civic Partnership Consultant (Recreation). The project team consists of the following members:

- David Plouffe, Heritage Planner (LUPP)

- Alexandra Hatcher, Civic Partnership Consultant, Arts and Culture (Recreation)
- Colin Dease, Lawyer (Law)
- Anthony Worman, Curator, Aero Space Museum
- Kristina Vasic, Buyer (Finance and Supply)
- Michael Harle, Inventory Recovery Specialist (Finance and Supply)
- Steve Ogle, Board of Directors, Aero Space Museum

## **Engagement Objectives**

The broad objectives of this engagement plan are to:

- Provide accurate and comprehensive information on the historical and cultural significance of the Mosquito and Hurricane
- Inform relevant stakeholders about the project, including the feasibility study and defining the various future options for the two aircrafts
- Ensure ongoing awareness of the project
- Receive feedback on the possible future options for the Mosquito/Hurricane
- Increase support for the project outcomes
- Provide input into the development of credible evaluation criteria in the RFP process
- Promote the RFP process nationally and internationally (part of communications strategy)
- Ensure decisions are made in a fair and transparent process

## **Stakeholder Identification**

Internal:

- Civic Leaders: Mayor, City Council (ultimate decisions made here)
- Project Team, project sponsor

External:

- Aero Space Museum: Two representatives are on the project team (helping with statements of significance, evaluation criteria)
- Calgary Heritage Authority: Advisory Board to City Council, has a Public Awareness committee and an Evaluation and Review committee
- Alberta Museums Association: link with the broader museum community
- Provincial government (Alberta Culture and Community Spirit)
- Potential buyers/restorers: at a national and international level
- Canadian Aeronautical Preservation Association (CAPA): Preservation experts providing technical support to the project team
- Canadian Heritage: Regulatory authority at the federal level responsible for artifacts of cultural/historical significance and export permits

- Popular Media: will provide an information link to many stakeholder groups
- Aircraft Enthusiasts
- Veterans groups
- Citizens expressing concerns to Mayor, Aldermen, Administration
- Citizens of Calgary
- Bid Evaluation Committee
- MLAs, MPs
- Trade magazines: for promotion of RFP process

## **Sensitivity/Risk**

Risks that have the potential to impact the project include the following:

- Change in political direction / Council decisions
- Misinformed stakeholders (when the Mosquito was built, where it has flown, where the funds from the sale would be used)
- Strong opposition from special interest groups (especially if one or both planes leave Canada)
- Preferred future option of stakeholder groups who were initially opposed is not put forward by Council for the RFP
- Perceived 'secretive' nature of earlier Council decisions
- Negative media coverage
- Loss of original buyer
- Status quo resulting from lack of political buy-in for proposed options
- Disconnect of City process from Canadian Heritage regulations

## **Stakeholder Roles and Strategies**

In the tables below, the stakeholders identified by the project team are organized by level of involvement. The levels used come from the Engage Framework's Spectrum of Strategies (Inform, Listen and Learn, Consult, Collaborate and Empower) . The tables delineate the roles of each stakeholder group, including the interests the group represents and the type of input being sought.

### **1. Consult Level**

The following stakeholder groups will provide direct input into the development of the range of options and the evaluation criteria for the RFP process.

<b><i>Stakeholder</i></b>	<b><i>Interests / Issues</i></b>	<b><i>Promised Involvement</i></b>	<b><i>Suggested Engagement Techniques</i></b>	<b><i>What is the question to be asked or the decision sought?</i></b>	<b><i>Advisory Role</i></b>	<b><i>Decision-Making Role</i></b>
Calgary Aerospace Museum	Current custodian; Potential beneficiary	Already being consulted	Regular meetings; correspondence	1. What is the best way to proceed? 2. Do you agree with the feasibility study findings?	Yes	No
Canadian Heritage	Regulatory body overseeing and approving the process	Already being consulted	Regular meetings; correspondence	Are the process and terms of the RFP acceptable?	Yes	No, but regulatory authority on possible sale
Canadian Aeronautical Preservation Association	Act as advisors through their experts and evaluation team	Already being engaged	Regular meetings; correspondence	1. What is the best way to proceed? 2. Do you agree with the feasibility study findings?	Yes	No

## **2. Listen & Learn Level**

The project team will meet with the following stakeholders to learn about their concerns/preferences with respect the range of possible options and to inform them of the project timeline and background information.

<b><i>Stakeholder</i></b>	<b><i>Interests / Issues</i></b>	<b><i>Promised Involvement</i></b>	<b><i>Suggested Engagement Techniques</i></b>	<b><i>What is the question to be asked?</i></b>	<b><i>Report Back to their Stakeholders/ Members</i></b>	<b><i>Advisory Role</i></b>
Aircrafts Enthusiasts / Veterans	Emotional attachment to assets	None	One Open House	What are your concerns regarding the proposed options?	Yes	No

## **3. Inform Level**

For the following stakeholder groups, we will prepare communication messages to build awareness and understanding of the project. Different presentations of project information (i.e. content, mode of delivery) will be used for each group – this will be detailed below in the “Techniques/Tactics” section.

<b><i>Stakeholder</i></b>	<b><i>Interests / Issues</i></b>	<b><i>Promised Involvement</i></b>	<b><i>Suggested Engagement Techniques</i></b>	<b><i>Report Back to their Stakeholders/ Members</i></b>	<b><i>Advisory Role</i></b>
Calgary Heritage Authority	Promotion of Calgary Heritage; Advisory group to Council; No regulatory authority in this case	None	Information sharing; Agenda item at CHA’s Evaluation and Review Committee	Yes	No
Alberta Museum Association	Promotion of Alberta Heritage; No regulatory authority in this case	None	Information sharing; Probably only one formal meeting	Yes	No
Alberta Historical Resources Act	Promotion of Alberta Heritage; No regulatory authority in this case; the province may also be a potential match donor	None	Information sharing; Probably only one formal meeting	Yes	No
General Public & Taxpayers	Costs and value for money; Best asset management practices; some concern over losing assets	None	Media relations campaign	N.A.	No
Media, incl. trade magazines	Matter already received coverage; issue is controversial	N.A.	Media relations campaign	N.A.	N.A.

MLAs, MPs	Citizens' interests; usually get contacted by concerned citizens	None	Include in news release distribution list	Yes	No
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**3. Empower Level**

City Council is a major stakeholder in this project.

<b><i>Stakeholder</i></b>	<b><i>Interests / Issues</i></b>	<b><i>Role</i></b>
Council	Responsibility to constituents; has been contacted on this issue by opponents of the potential sale; has received two Standing Policy Committee reports and an Administration Update	Ultimate decision-maker on possible options for the RFP, and approval of Administration recommendations from the results of the RFP process.

Note: Restorers, proponents and potential buyers will be engaged through the RFP process.



## **Techniques/Tactics**

This section provides a detailed breakdown of engagement activities, organized chronically. Developing engagement techniques should be considered an iterative process, and the later stages of engagement will need to be revised and refined as the project progresses.

### **STAGE ONE: DEVELOPING RANGE OF OPTIONS (June – November 2008)**

This phase of engagement will focus on the development of the range of options for the Mosquito/Hurricane that will be put forward to Council in November 2008.

#### ***ACTIVITY #1: Listen and Learn with Veterans/Aircraft Enthusiasts***

##### **Engagement Outcomes:**

- A) The project team gains an understanding of stakeholder issues relating to the proposed options.
- B) Attendees understand the cultural and historical significance of the aircraft, the range of possible options for the future of the aircraft, and The City's process for making an ultimate decision (emphasis that City holds ultimate decision-making power).

##### **Invited Stakeholders:**

- Direct invite to concerned citizens (people who contacted The City directly about this issue,
- General invite to "Aircraft Enthusiasts" – group names to be supplied by Aerospace Museum
- General invite to Aero Space Museum to distribute to its membership
- General invite to Royal Canadian Legion, other veterans groups

##### **Engagement Technique: Open House**

In an Open House, project materials are presented in a station format that stakeholders are invited to tour through at their own pace. There is generally no large group session with presentations, but instead invitees talk one-on-one with project team members while reading visual storyboards outlining highlights of the project.

Specifically for this project, we would suggest one or two (max) Open House sessions to take place in September. One session could take place in the evening and one in the daytime to account for different schedules. Each session would be three hours in length. Considering that the majority of the invitees are retired, a day

event is feasible and may be well-attended. We could perhaps expect 30-40 participants in each session.

Suggested materials for the Open House (to be determined by Communications team):

- Story boards outlining cultural/historical significance of the plans, Council's decision process, the RFP process, range of options (required)
- Feedback forms: Participants will be requested to fill out a feedback/evaluation form (required)
- Ongoing visual Powerpoint presentation with same information as storyboards (possible, depending on A/V options at the venue – may be redundant)
- Information on how participants can stay abreast of project outcomes should be provided either orally or in written form (to “close the loop”)

Location: Is it appropriate to hold this event at the Aero Space Museum???

### ***ACTIVITY #2: Information Item on Calgary Heritage Authority Meeting Agenda***

**Engagement Outcome:** To inform and respond to questions from the Calgary Heritage Authority (CHA)

**Involved Stakeholders:** The CHA has a sub-committee, called the Evaluation and Review Committee which would be an appropriate venue for presenting information on the project and taking questions.

#### **Engagement Technique: Present at CHA Monthly Meeting**

Add Mosquito/Hurricane project as an informational agenda item on the monthly meeting of the Calgary Heritage Authority in June or July.

The CHA mandate is to advise Council on all matters related to heritage resources (mostly buildings, but this project could also fit in this broad mandate).

- o Project team member would present similar information as is listed in Speaking Points for the Museum AGM (i.e. overviews of Council Directions in 2007/2008, the range of possible options, the RFP process and the broad project timelines)
- o Project team member would take questions/comments from the CHA Board. If there are issues that warrant further engagement with this group, we can revise the engagement plan as we move forward.

### ***Activity #3: Create Communications/Media package***

***NOTE: This section will need to be coordinated with the Communications rep.***

**Engagement Outcome:** To inform relevant stakeholders about the Council decision process, the range of options, the engagement process, and the RFP process.

**Involved Stakeholders:** Attendees at the Listen and Learn + stakeholders we want to update on the progress of the project (provincial government, federal government, CAPA, AMA, Aero Space Museum). Communication should also continue with the original buyer.

**Engagement Technique: Creation of Project Backgrounders, Media Release**  
The package will form the basis of the presentations at the Listen and Learn and the CHA meeting. As well, it will be used as the basis for an information update to other stakeholder groups (other levels of government, CAPA, etc). Key inform messages to be included in the package are:

- Outline of range of possible options for the aircraft
- Dispelling the myth that the Mosquito will fund museum operations
- This particular Mosquito did not fly during the war
- This particular Mosquito did not crash in Calgary
- Outline of decision process (i.e. Council decision on range of options, the engagement plan, the RFP process, the evaluation committee, the ultimate Council decision after the RFP process)
- That Administration is undertaking active engagement (because of the earlier perceived notions of secrecy)

A general media release could be sent out announcing the Listen and Learn and providing a blanket invite to anyone interested in attending. This would promote transparency and inclusiveness, but also risks a larger, potentially more volatile turnout. However, the active opponents to the project will also be invited personally, which mitigates the risk. We should consult with the Coms rep on whether this has the potential to lead to media coverage – I'm not sure it's a newsworthy event, but am suggesting a media release to ensure the process is transparent (especially because the previous Council activities were not public).

#### ***Activity #4: Consult with Technical Experts***

**Engagement Outcome:** Feedback on the technical aspects of the possible range of options for the Mosquito/Hurricane.

**Involved Stakeholders:** Canadian Heritage could provide input on alignment with federal departmental rules. Other input could come from representatives of CAPA, AMA, and others as needed.

**Engagement Technique:** One-on-one consultations in person, by phone or over email.

## **STAGE TWO: Developing Evaluation Criteria for RFP process (May 2008 – November 2008)**

This phase of the project focuses on building a credible and defensible RFP process. The project team is developing a draft set of evaluation criteria based on input from representatives of the Aero Space Museum. At the same time, the project team will be developing the components of the RFP process.

The draft set of evaluation criteria will be distributed to third-party experts (for example, experts from CAPA, Canadian Heritage – still to be determined) for comment in advance of finalizing the criteria.

### ***ACTIVITY #1: Create Bid Evaluation Committee***

Not specifically an engagement activity, but it will be important for the project team to identify and invite potential members of the evaluation committee (suggestions include CAPA, Canadian Heritage). I note it here to ask whether this is something to be presented to Council as well (for yet another level of transparency). This could be either as an information point or for a decision.

## **STAGE THREE: Running the RFP process (November 2008 – mid-2009)**

After Council makes a decision on which of the possible future options remains on the table, the project team will run a RFP process open to both national and international parties. The Project Team will call for submissions, hold a bidder information session, and schedule the evaluation process. Beyond this, we suggest the following communications/engagement activity.

### ***ACTIVITY #1: Update Stakeholders on Council Decision/RFP process***

**Engagement Outcome:** Inform involved stakeholders on outcome of Council meeting and terms for the RFP.

**Involved Stakeholders:** All stakeholders identified by the project team should be part of this activity.

**Engagement / Communication Techniques:** Communications team will create relevant materials for distribution to each stakeholder group. A media relations strategy will need to consider both popular media and specialized media (trade magazines and other venues for reaching potential bidders in the RFP process)

## **STAGE FOUR: Report to Council/ Final Decision (Early to mid 2009)**

In this phase of the project, Administration will present a final report to Council on the outcome of the RFP process. Council will make a final decision on the future of the Mosquito/Hurricane plans. The engagement/communication for this phase of the project will focus on communication of Council's final decision.

### **ACTIVITY #1: Inform Stakeholders of Council Decision**

**Engagement Outcome:** All involved stakeholders are aware of the Council decision and its rationale.

**Involved Stakeholders:** All stakeholders identified by the project team should be part of this activity, including the successful and unsuccessful bidders. It is important for closing the loop on stakeholder participation.

**Engagement Techniques:** A media release will be sent announcing the decision. Council members, Administration should be available for Q/A. Attendees at the Listen and Learn, technical experts, bidders, etc., should receive individual communications.

If an export permit is needed as a result of Council's decision, Canadian Heritage requires a subsequent application process to approve the sale.

## **Alignment**

The project is aligned with the five Engage cornerstones: Accountability, Inclusiveness, Transparency, Commitment, and Responsiveness. As well, the project will align with Canadian Heritage's regulations/instructions on the sale of cultural artifacts.

## **Required Resources**

The Project Team is responsible for funding and implementing the engagement strategy. The ERU's role is to help in devising the engagement strategy, including advice on if, how and when to engage stakeholders throughout the project timeline. As well, the ERU will help the Project Team in choosing facilitators and venues for the engagement events (if needed) and will liaise with Communications in the preparation of communication messages.

Specifically, resources (time, money and personnel) are required to do the following for this engagement plan:

- Book and prepare venues (finding locations, booking A/V equipment, handouts, storyboards, etc.)
- Prepare and print/send communications material (in conjunction with Communications representative)

## **Evaluation**

The Engagement Resource Unit and the project team will conduct periodic evaluation of the engagement plan to incorporate new information and changes in project direction (at each Council decision point at a minimum).

## **Schedule of Reporting**

To be determined.