



Engage Resource Unit

Research and Engagement Library // Document Overview

Document Overview

Project Name: **Triple Bottom Line Policy and Framework Review Project**

Document Type: Engagement Plan or Strategy

What is an Engagement Plan or Strategy ?	What is a What we Heard Report ?	What is a Final Summary Report ?
<i>A document that outlines the objectives for conducting engagement, who we planned to engage with and what engagement activities were planned.</i>	<i>A document that outlines the feedback that was heard through an engagement process.</i>	<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>
Why are we engaging?	The Triple Bottom Line Policy needs to be updated to reflect existing sustainability practices at The City, including clarifying sustainability practices and the tools that are available to support them.	
What stakeholders are involved?	City Council, Administrative Leadership Team, The City of Calgary Business Units, Imagine Calgary, Civic Partners, Calgarians, CED	
What are we talking to stakeholders about?	Assessment of current state of policy and framework and suggestions and ideas on how to adapt the Triple Bottom Line Policy to include the full systems approach to sustainability (smart growth, sustainability direction) and what tools/framework are needed to accomplish task.	
When did this engagement happen?	2013	

TBL Review engagement strategy

Project: The Triple Bottom Line Policy needs to be updated to reflect existing sustainability practices at The City, including clarifying sustainability practices and the tools that are available to support them.

Decision being sought:

- Should the Triple Bottom Line Policy be modified to reflect the full systems approach of sustainability, and should Council reports require a new method of reporting it? (Steph supplied)
- **Change to: how do we adapt the Triple Bottom Line Policy to include the full systems approach of sustainability (smart growth, sustainability direction, etc.) and what tools/framework do we need to do it?**

Non negotiable:

- 2020 Sustainability Direction identifies the definition for sustainability within the corporation. This will not be open for discussion
- Smart growth must be included?

Project scope:

- Review and rewrite/update TBL Policy
- Revise TBL Policy Framework
 - Review TBL Policy tools

What is engagement?

Engagement is the process that involves stakeholders in problem solving or decision-making and uses stakeholder input to make decisions. Fundamentally, the Project team needs to believe that by involving stakeholders in the decision-making process, the decisions/project will be improved.

The City of Calgary has an engage! Policy that is available [here](#).

Engagement rationale

Based on the information gleaned from meetings, discussions with project team members and observing committee meetings, engagement in the TBL Policy review is recommended.

Engagement in this project will result in:

- a foundational understanding of the TBL Policy
- identification/need assessment on TBL Policy tools and framework
- stakeholder input into strengths and weaknesses in the current state of how the TBL policy is being used
- stakeholder recommendations/observations or suggestions on future state of the TBL approach

There are two different approaches to TBL engagement:

1. Policy first. Work on the TBL Policy itself and involve stakeholders in the written policy, which will then inform the framework and consequently the tools needed to comply with the policy. Then, work (and outside of the engagement scope) would be around teaching and training in the use of the tools and bringing awareness to the policy and its pieces.
2. From the ground up. Think in terms of asking if the tools needed to support the work* are sufficient or are there additional tools needed, which then would lead to the development of the framework that would help teach and train people to use these tools, and the policy which describes and defines how the TBL Policy will be applied consistently, efficiently and effectively.

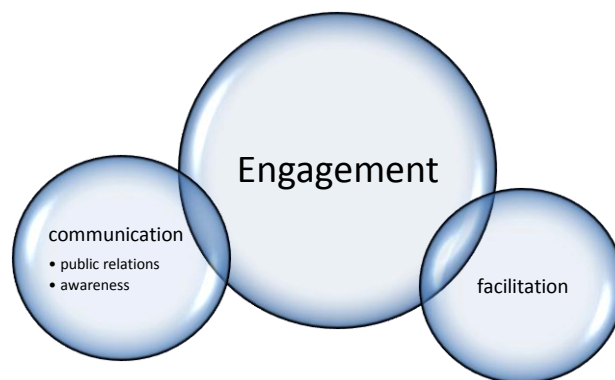
* (Is the work 'to apply social, economic, environmental and smart growth considerations on every project that The City undertakes'?)

Regardless of approach, there will be considerable need for further stakeholder analysis and work on the best ways to gather their input.

The following recommendations on how best to proceed with engagement are based on information gleaned from meetings, discussions with project team members and observing committee meetings.

Preliminary Engagement strategy:

- engagement will focus on internal stakeholders first, with external stakeholders being considered next. This is in keeping with TBL Policy being an administrative policy, where the belief is the lions' share of the input being expected from internal stakeholders and those most impacted, influenced and interest will share their experiences and expertise.
- The diagram below is a depiction of what will be key to the engagement: communication and facilitation. Communication and overall education on what TBL Policy is and what the goal of the review is will be crucial to the facilitation process and ultimately the overall engagement as a whole.



Stakeholder groupings:

Steering Committee – Collaborate with this group and keep them updated as to the progress of the project. This group will also serve as a champion to other stakeholder groups on the value of the TBL Policy Review.

Civic Leadership – Listen and Learn from this group and keep them updated on the project.

Admin Leadership – Inform this group as to what is happening and the progress of the project. Keep this information higher level and update on the impacts to their business (at a departmental/business unit and divisional level). This recommendation is based on Project sponsor’s relationships within the CMO and other project learnings.

Project Team – Collaborate and utilize.

BU users – consult – what works for you, what doesn’t.

BU others – consult – What are the barriers to using TBL approach? Includes management, dept ID owners and EA’s

Corporate process users – Capital Investments – consult – strengths, weaknesses, opportunities, threats,

Corporate process users – by project/program/portfolio consult – strengths, weaknesses, opportunities, threats, includes report writers, corporate initiatives, resource teams.

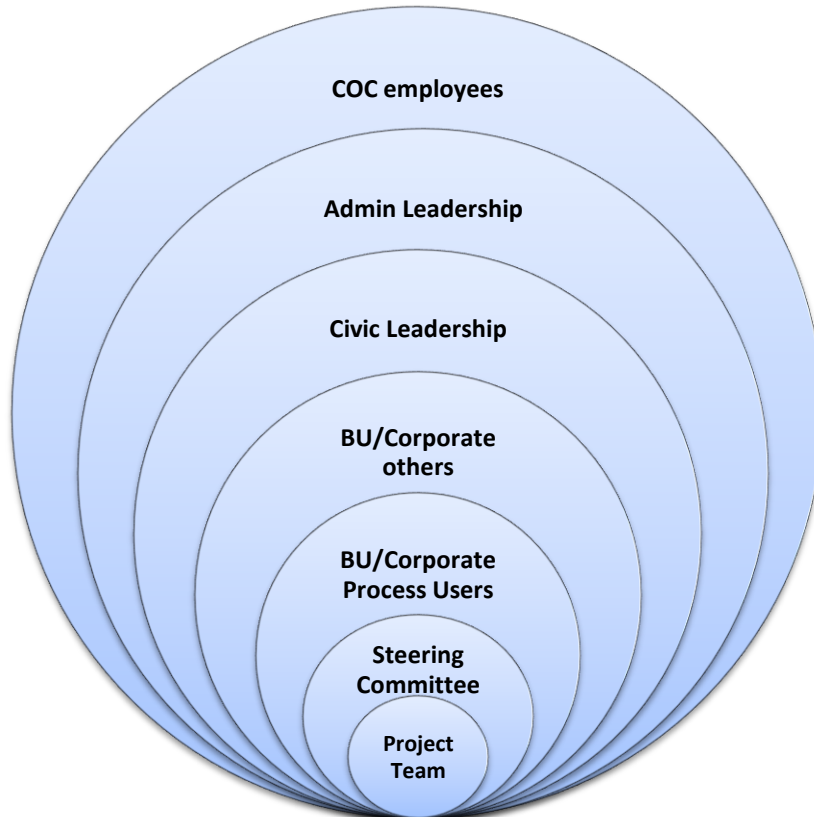
CED and imagineCalgary – external – listen and learn

Civic Partners – external – listen and learn

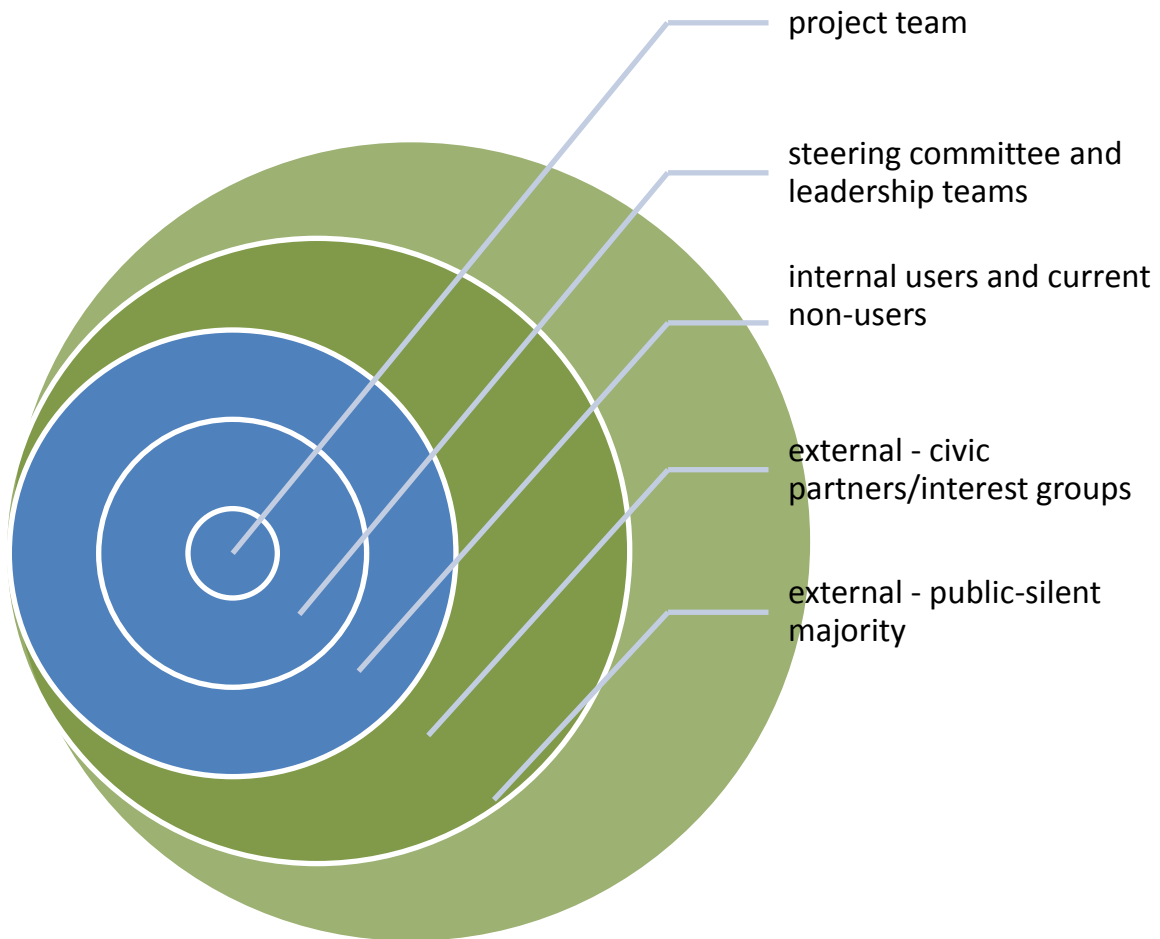
Public – external – listen and learn

Visually, this looks like:

Internal Stakeholder groupings 1



Stakeholder group engagement 1



Engagement strategy:

I would recommend that we begin engagement in a phased approach.

Pre-work:

Who uses the TBL tools and framework and other

Phase one, Ideation on current state - engage employees on:

- who uses the TBL tools and framework and what they like about it
- who does not use the TBL tools and framework and why
- what other tools do you use to assess sustainability in your projects?
- what do you need to do this work? What's missing? What barriers are in place?

Pework:

Project team researches best practices so that this can be incorporated into the findings before phase two of the engagement. We can share the best practices and research as another stream of input as what has informed the phase two of the engagement

Phase two, next steps – engage stakeholders (internal and external)

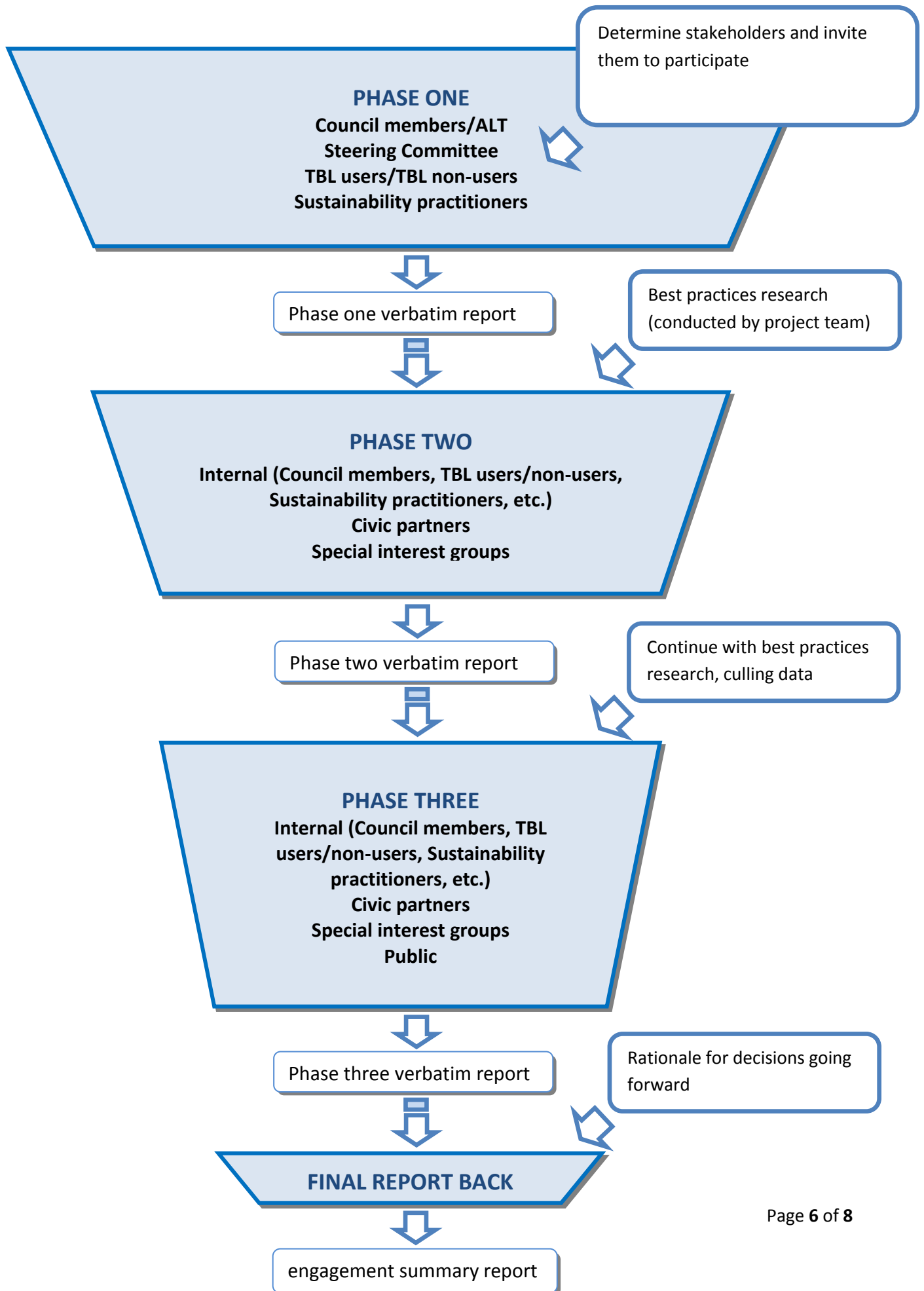
- here's what we heard
- here's what we found (best practices)
- here's where we think we need to go?
- What's the best way to get there – tools – framework – policy
- Emphasize that this is not so much what the tool will look like, but the components of it. Training and specifics will be dealt with in the implementation of these tools and is outside of the scope of this project at this time.

Pework:

Project team continues to cull data

Phase three – going forward – engage stakeholders (internal and external)

- Amalgamation of input, rationale of what is being presented to council
- Any further comments
- Dates and timelines (if needed)



Timelines:

Date	What	Purpose	Responsible
	Introduce project to ALT for preliminary approval to go forward	<ul style="list-style-type: none"> - gain approval - align with business goals - provides opportunity for champions and understanding 	COMMS/ERU
	One-on-one sessions with council members	Stakeholder group: <ul style="list-style-type: none"> - what do you need in terms of what appears on the report? 	COMMS/ERU
	Phase 1 – current state with internal employees (users/non-users; those who don't know)	<ul style="list-style-type: none"> - find out what current state is - find out expectations so we can manage them - discover barriers in current system 	ERU
	Aggregate data and create verbatim reports	<ul style="list-style-type: none"> - input collection - recognizing and identifying themes (if there are any) 	ERU
	Phase 2 – next steps with internal and external stakeholders	<ul style="list-style-type: none"> - here's what we heard - here's what we found (best practices) - here's what we determined as where we want to go - now how do we get there? - what do you need to get there? 	ERU
	Aggregate data and create verbatim reports	<ul style="list-style-type: none"> - input collection - recognizing and identifying themes (if there are any) 	ERU
	Phase 3 – going forward - with internal and external stakeholders	<ul style="list-style-type: none"> - input amalgamation - rationale on decisions - final thoughts before going to council? - dates or timelines (if council approves, training and more information to begin xxx) 	ERU
	Aggregate data and create verbatim reports	<ul style="list-style-type: none"> - input collection 	ERU
	Final report back to all stakeholders	Final chance to provide input	ERU

End of August 2013	Summary report		ERU
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