REQUEST FOR PROPOSALS No. 20-019

Bylaw 500 Review and Update Project

ISSUED: April 3, 2020

CLOSING DATE AND TIME:
Submissions must be received at the Closing Location on or before:
3:00 PM (15:00 hrs) Local Time on May 8, 2020

Regional District of Nanaimo (RDN) Contact for Questions:
Greg Keller, Senior Planner, (250) 390-6527, gkeller@rdn.bc.ca

Questions are requested at least five (5) business days before the closing date.

Proponent's Information Meeting:

No Proponent's meeting will be held

Proposals will not be opened in public

Instructions to Proponents

Closing Date/Time/Location
Submissions must be received at the closing location on or before 3:00 PM (15:00 hrs), Local Time, on May 8, 2020. Select one (1) of the Submission Methods below:

1. By Email: With "RFP 20-019 Bylaw 500 Review and Update Project" as the subject line at this electronic address: gkeller@rdn.bc.ca

   Please note: Maximum email file size limit is 20MB, or less. The RDN will not be liable for any technological delays of submissions.

2. By hand/courier delivery: One (1) copy of the Proposal along with one (1) electronic copy of the Proposal on a USB stick should be enclosed and sealed in an envelope clearly marked: "RFP 20-019 Bylaw 500 Review and Update Project**"** delivered to the:

   Regional District of Nanaimo
   Main Reception – 2nd Floor
   6300 Hammond Bay Road
   Nanaimo, B.C., V9T 6N2
   Attention: Greg Keller, Senior Planner, Current Planning

   Should there be any differences between the hard copy and the electronic copy, the hard copy will prevail. Proposals received by facsimile are not accepted.

Amendment to Proposals
Proposals may be amended in writing and sent via email at gkeller@rdn.bc.ca on or before the closing. Such amendments should be signed by the authorized signatory of the Proponent.

Addenda
If the RDN determines that an amendment is required to this RFP, the RDN will post the Addendum on the RDN (www.rdn.bc.ca) and BC Bid (www.bcbid.gov.bc.ca) websites. Each addendum will be incorporated into and become part of the RFP. No amendment of any kind to the RFP is effective unless it is contained in a written addendum issued by the RDN. It is the sole responsibility of the Proponent to check and ensure any and all amendments are included prior to submitting their final Proposal submission.

Withdrawal of Proposals
The Proponent may withdraw their Proposal at any time by submitting a written withdrawal email to gkeller@rdn.bc.ca on or before the closing.

Unsuccessful Vendors
The District will offer debriefings to unsuccessful Proponents, on request, at a mutually agreeable time.

1. INTRODUCTION

The RDN has initiated the Bylaw 500 Review and Update Project (the Project) and is seeking a qualified consultant(s) to provide planning, research, leadership, drafting, public engagement, and graphic support services to produce an updated zoning Bylaw following staff direction. The purpose of the Project is to address known problems and to improve bylaw components that are unclear, inconsistent, or are challenging to administer or enforce. The Project also aims to modernize the Bylaw in response to emerging issues and best practices.

The budget for design and delivery of public engagement is $90,000, exclusive of applicable taxes.

2. BACKGROUND

"Regional District of Nanaimo Land Use and Subdivision Bylaw No. 500, 1984" was adopted in October 1984. Later in November of 1986, the Bylaw was struck down by the courts for failure to comply with the notice requirements of the *Municipal Act*. In response, in 1987, the RDN rescinded Bylaw 500, 1984 and enacted Bylaw 500, 1987. "Regional District of Nanaimo Land Use and Subdivision Bylaw No. Bylaw 500, 1987" (Bylaw 500) applies to Electoral Areas A, C, E, G, and H which includes an area of approximately 159,447 hectares (see Appendix 1 – Bylaw 500 Area Map). Based on the 2016 Census, Bylaw 500 serves a population of approximately 27,340.

Bylaw 500 is the principle regulatory bylaw that specifies the regulations that apply to the use and development of land in the areas where it applies.

The Project has been identified in the Current Planning Department's work plan for many years and is also identified by the Board's 2019-2020 Operational Plan. In addition, Bylaw 500 has been in place for 36 years and has undergone a significant number of amendments over the years that include both owner-initiated zoning amendments and RDN planning initiatives. The Planning Department is currently reviewing the 429th amendment to Bylaw 500. Given the large number of amendments that have been made to Bylaw 500 over the years, continuing on this path presents an increased risk of creating additional inconsistencies, inefficiencies, and unintended consequences.

Despite the various updates made to Bylaw 500 over the years, the primary reason for the review is to address known problems and to improve bylaw components that are unclear, inconsistent, or are challenging to administer or enforce. The Project also aims to modernize the Bylaw in response to emerging issues and best practices.

Efforts have been made by the RDN to maintain and extend the life of Bylaw 500 by completing targeted updates, such as the recent Development Permit Area (DPA) standardization project, and agriculture regulation updates. However, for the most part, Bylaw 500 has remained unchanged since 1984. Continuing to maintain Bylaw 500 in its current form is no longer practical.

In addition, a number of other factors that support the Project include:

- Significant population growth and development has occurred between 1984 and 2020;
- In general, many of the easy to develop properties have been developed. Bylaw 500 is not well suited to address properties with significant development constraints;
- Economic shifts; and,
- Increasing community expectations.

3. SCOPE OF SERVICES

The scope of services for this contract includes research, planning, public outreach design and implementation, drafting of documents, document design, and graphic support services. The Bylaw 500 Review and Update Project includes, but is not necessarily limited to the Project Focus Areas (See Appendix 2 – Project Focus Areas).

Table 1 below details the consultant and RDN responsibilities. Approval on the deliverables for the scope of services is the RDN.

Table 1: Project Responsibilities

Consultant Responsibility	**RDN Responsibility**
Prepare and finalize a public engagement plan which follows the RDN Public Engagement Policy and is based on the RDN Public Engagement Strategy and Toolkit.	Provide stakeholder list Review and provide input on public engagement plan and submit to RDN Board for endorsement
Implementation of the endorsed engagement plan including facilitating live public engagement events and set-up.	Making all necessary arrangements and advertising for engagement events. Attend live public engagement events and hold office hours for the Project as required. Co-facilitate and/or present where required. Create a project website and oversee online engagement opportunities.
Develop a modern document design that is easy to navigate, simple to maintain, is presentable in digital, print and online versions, and is in Microsoft Word 2016 or newer. Ensure that the document is designed in a way which makes it easy for us to serve our customers.	Provide oversight, direct the work of the consultant as required, approve the document design prior to proceeding to drafting stage.
Research the Project Focus Areas and draft potential options in a format suitable for public and Board consumption. Research and draft options on other issues that may arise through the process.	Provide a list of Project Focus areas and organizational knowledge of the issues (see Attachment 1 – Project Focus Areas). Review and provide input on potential options.
Provide planning advice on best practices, and options to address ideas, questions, and concerns generated from the community engagement process.	Provide overall direction and manage the project.
Communicate mapping needs to the RDN in a timely manner throughout the Project.	Provide GIS mapping support services including analysis, map amendments, data, bylaw maps, and other mapping supports for the Project.

Draft an updated zoning bylaw. Track all proposed changes and conduct analysis on the impacts of the proposed changes.	Oversee the drafting process and take the lead in internally reviewing the draft zoning bylaw. Review and provide input on the draft bylaw and seek Board endorsement and approval at appropriate times throughout the process. Draft staff reports and amendment bylaw.
Graphically illustrate key regulations in the draft bylaw using diagrams, graphics, and images embedded throughout the document.	Identify which regulations in the draft zoning bylaw require illustrations.

4. DELIVERABLES AND OUTCOMES

a) Public engagement plan following RDN Public Engagement Policy.
b) Live public engagement events to be determined through the process of developing the public engagement plan.
c) A report outlining the results of analysis of project focus area and options in a format presentable to the RDN Board and the public.
d) Diagrams, graphics, and/or images that illustrate key regulations contained in the updated bylaw.
e) A graphically-illustrated updated draft Zoning Bylaw in Microsoft Word and Adobe PDF that addresses the project focus areas as well as input received from the Board and through the public engagement process.
f) Note: any deliverables not identified in this RFP that the Contractor will also provide to the RDN should be listed in the proposal.

5. Project Schedule/Timeline

The requested project timeline is shown in Table 2 below.

Table 2 – Project Schedule/Timeline

Milestone / Task	Schedule
Post request for RFPs	April 3, 2020
RFP closing date	May 8, 2020
Award contract (anticipated)	May 22, 2020

6. REFERENCE/BACKGROUND INFORMATION

The following is not an exhaustive list:

- Regional District of Nanaimo Land Use and Subdivision Bylaw No. 500, 1987 – see https://www.rdn.bc.ca/bylaws-policies-forms-maps
- Bylaw 500 Area Map – See Attachment 1
- Project Focus Areas – See Attachment 2
- Regional District of Nanaimo Public Engagement Policy – See Attachment 3
- Regional District of Nanaimo Public Engagement Strategy and Toolkit – See Attachment 4
- Draft Consulting Services Agreement

7. *PROPOSAL SUBMISSION AND EVALUATION*

The following criteria identify the key components on which Proposals to this RFP will be evaluated.

Evaluation Criteria	Point Value	X Rating	Total Score
Corporate Qualifications, Relevant Experience, and Social Responsibility	10		
Experience, Depth, and Breadth of Project Team	20		
Approach and Methodology	15		
Innovation	5		
Project Management and Quality Assurance	10		
Proposed Fees	40		
Total	**100**		

Rating	Description
5	Exceeds Expectations, Proponent clearly understands the requirement, Excellent Probability of success
4	Somewhat Exceeds Expectations
3	Meets Expectations, Proponent demonstrates a good understanding of the requirement. Good probability of success
2	Somewhat meets Expectations, Minor weakness and/or deficiencies. Fair probability of success
1	Does not meet expectations, does not demonstrate a good understanding of the requirements, low probability of success
0	Response indicates a complete misunderstanding of the requirements, very low probability of success.

Evaluation Criteria Notes:

a) *A score of ZERO (0) on ANY of the Rated Criteria items MAY result in disqualification of a Submission.*
b) *These are the only factors which will be used to evaluate the submission.*
c) *The highest scoring or any submission will not necessarily be accepted.*
d) *The lowest price proposal will receive a rating of 5. Other proposals will receive reduced ratings based on the proportion higher than the lowest price. i.e. Rating = (Min Cost x 5)/Cost*

Proposals submitted should be in enough detail to allow the RDN to determine the Proponent's qualifications and capabilities from the documents received. Every effort should be made to include complete details of the proposed work. The selection committee, formed at the RDN's sole discretion, will score the Proposals in accordance with the criteria provided.

The selection committee may proceed with an award recommendation and/or the RDN may proceed to enter into negotiations with the highest evaluated proponent with the intent of developing an agreement. If the parties after having bargained in good faith are unable to conclude a formal agreement, the RDN and the Proponent will be released without penalty or further obligations other than any surviving obligations regarding confidentiality and the RDN may, at its discretion, contact the Proponent of the next best rated Proposal and attempt to conclude a formal agreement with it, and so on until a contract is concluded or the RFP is cancelled.

The RDN reserves the right to award the assignment in whole or in part or to add or delete any portion of the work.

Throughout the evaluation process, the selection committee may seek additional clarification on any aspect of the Proposal to verify or clarify the information provided.

8. PROPOSED PURCHASE CONTRACT

The RDN's preferred form of Contract is attached herein. Proponents should carefully review this form of Contract. Proponents may (but are not required to) request that RDN consider making revisions to the form of Contract, including the scope of Services. Proponents should submit such requests to the RDN well before the Closing Date and Time. If the RDN agrees to a request received prior to the Time, then RDN will issue an Addendum to modify the Contract. Failure to do so means acceptance of the agreement as presented.

9. GENERAL CONDITIONS

9.1 No Contract

By submitting a Request for Proposal and participating in the process as outlined in this RFP, proponents expressly agree that no contract of any kind is formed until a fully executed contract is in place.

9.2 Privilege Clause

The lowest or any proposal may not necessarily be accepted.

9.3 Acceptance and Rejection of Submissions

This RFP does not commit the RDN, in any way to select a preferred Proponent, or to proceed to negotiate a contract, or to award any contract. The RDN reserves the right in its sole discretion cancel this RFP, up until award, for any reason whatsoever

The RDN may accept or waive a minor and inconsequential irregularity, or where applicable to do so, the RDN may, as a condition of acceptance of the Submission, request a Proponent to correct a minor or inconsequential irregularity with no change in the Submission.

9.4 Conflict of Interest

Proponents shall disclose in their Proposals any actual or potential Conflict of Interest and existing business relationships it may have with the RDN, its elected officials, appointed officials or employees.

9.5 Solicitation of Board Members and RDN Staff

Proponents and their agents will not contact any member of the RDN Board or RDN Staff with respect to this RFP, other than the RDN Contact named in this document.

9.6 Litigation Clause

The RDN may, in its absolute discretion, reject a Proposal submitted by Proponent, if the Proponent, or any officer or director of the Proponent is or has been engaged either directly or indirectly through another corporation in legal action against the RDN, its elected or appointed officers and employees in relation to:

(a) any other contract for works or services; or

(b) any matter arising from the RDN’s exercise of its powers, duties, or functions under the Local Government Act, Community Charter or another enactment within five years of the date of this Call for Proposals.

In determining whether to reject a Proposal under this clause, the RDN will consider whether the litigation is likely to affect the Proponent’s ability to work with the RDN, its consultants and representatives and whether the RDN’s experience with the Proponent indicates that the RDN is likely to incur increased staff and legal costs in the administration of this Contract if it is awarded to the Proponent.

9.7 Exclusion of Liability

Proponents are solely responsible for their own expenses in preparing and submitting a Proposal and for any meetings, negotiations, or discussions with the RDN. The RDN will not be liable to any Proponent for any claims, whether for costs, expense, losses or damages, or loss of anticipated profits, or for any other matter whatsoever, incurred by the Proponent in preparing and submitting a Proposal, or participating in negotiations for a Contract, or other activity related to or arising out of this RFP. Except as expressly and specifically permitted in these Instructions to Proponents, no Proponent shall have any claim for compensation of any kind whatsoever, as a result of participating in this RFP, and by submitting a Proposal each Proponent shall be deemed to have agreed that it has no claim.

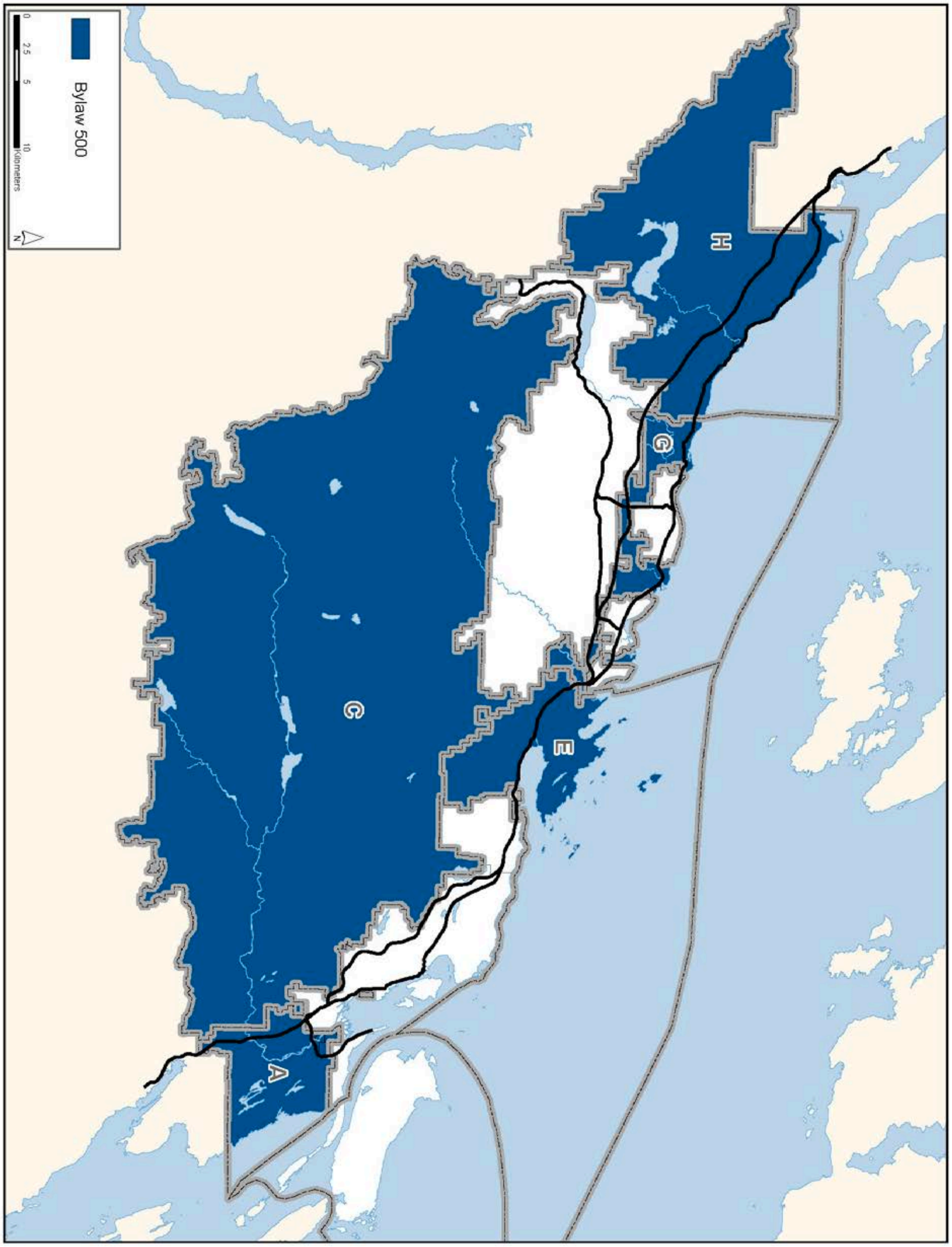
9.8 Ownership of Proposals

All Proposals, including attachments and any documentation, submitted to and accepted by the RDN in response to this RFP become the property of the RDN.

9.9 Freedom of Information

All submissions will be held in confidence by the RDN. The RDN is bound by the Freedom of Information and Protection of Privacy Act (British Columbia) and all documents submitted to the RDN will be subject to provisions of this legislation. The successful vendor and value of the award is routinely released.

Attachment 1
Bylaw 500 Area Map



Attachment 2
Project Focus Areas

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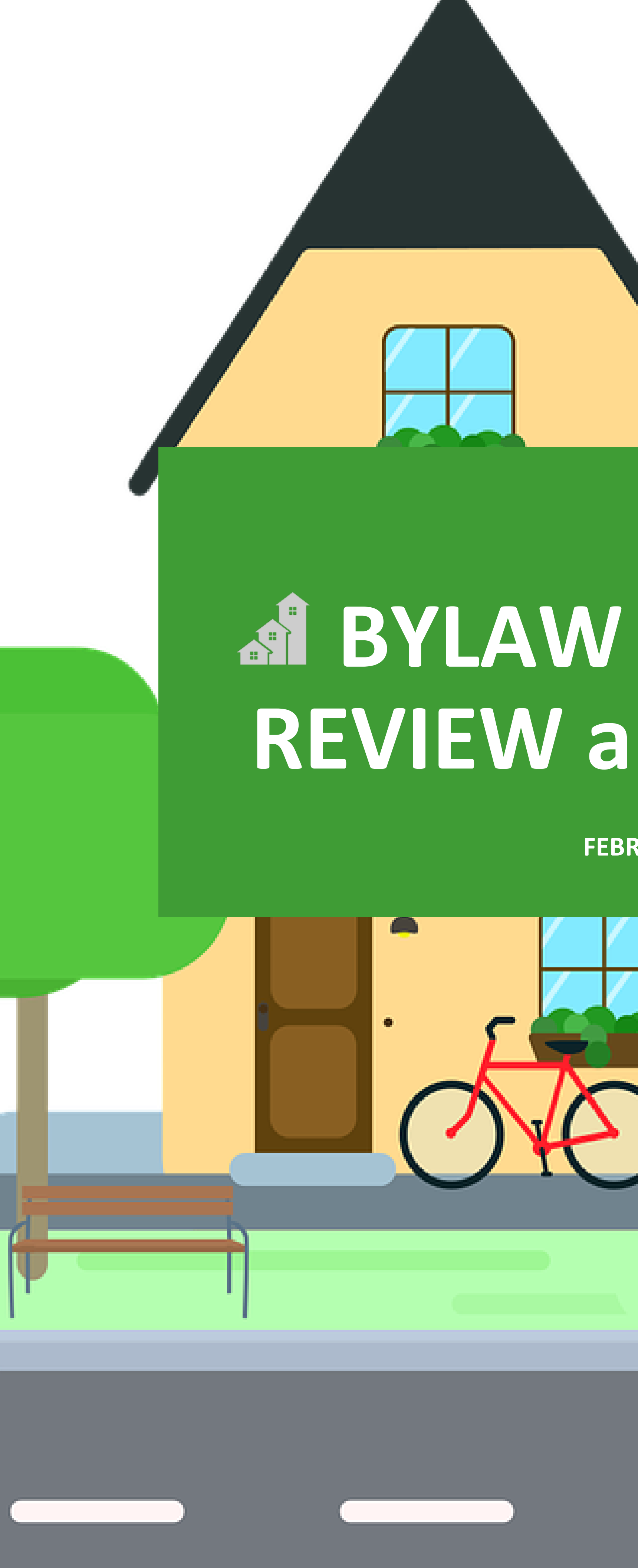

BYLAW 500 REVIEW and UPDATE

FEBRUARY 2020

Regional District of Nanaimo

Phase One
Focus Areas

PREPARED BY:

Greg Keller, Senior Planner
Paul Thompson, Manager Current Planning

Bylaw 500 Update and Review Project

Phase One: Background

The Bylaw 500 Review and Update project is proposed to be divided into three distinct phases as follows:

Phase One: Clarification and Housekeeping
Phase Two: Housing (Green Building and Affordability) and Land Use Contracts
Phase Three: Other

The purpose of this document is to provide a short summary of each focus area included in Phase one of the project. This document also provides a conceptual outline of focus areas to be considered during Phases two and three.

The focus areas have been identified based on our experience working with Bylaw 500 with the intent of addressing problems, inconsistencies, current trends, emerging issues, and improving overall efficiency. As per the Board's 2019-2020 Operational Plan (the Plan), the Bylaw 500 Review and Update project is a targeted review which also includes the other Bylaw 500 related actions identified in the Plan. It is anticipated that focus areas provided herein will evolve in response to community, stakeholder, and Board input.

Regional District of Nanaimo Land Use and Subdivision Bylaw No. 500 (Bylaw 500) was adopted in 1984 and later set aside by the courts for failure to comply with the notice requirements of the *Municipal Act* in 1986. In response, in 1987, the RDN rescinded Bylaw 500, 1984 and enacted Bylaw 500, 1987. Bylaw 500 has served the Regional District of Nanaimo (RDN) well during the last 36 years. However, the region has experienced significant growth, the economy has evolved, and community expectations have changed since Bylaw 500 was first adopted in 1984.

In addition, Bylaw 500 is now being considered for amendment for the 429th time. These amendments represent both owner-initiated amendments (zoning amendments) primarily to facilitate changes in land use as well as RDN-initiated amendments to implement various land use projects and modernization.

The above illustrates the need to consider a review and update to Bylaw 500. As a result of numerous amendments to various sections of Bylaw 500 over time, inconsistencies, additional complexity, difficulties with interpretation, and unintended consequences have developed that affect the ability of Bylaw 500 to effectively regulate land use in an efficient manner. It has become clear that Bylaw 500 is in need of a holistic review and update.

Bylaw 500 Review
Project Phasing and Review Items
February 11, 2020

Phase One: Clarification and Housekeeping

Focus Areas:

Definitions	**Current definitions are in need of update to address concerns over clarity and to reflect current practices and modern standards. The following examples illustrate some definitions in need of updates.**

- *Accessory Building* - Clarification is needed to better define accessory building and when a building is considered to be a dwelling.
- *Dwelling Unit* - The definition of dwelling unit does not provide adequate clarity with respect to the use of breezeways and heated hallways which are used to connect different parts of a dwelling.
- *Floor Area* - The definition is not clear on what is considered floor area; clarity needed on buildings that shelter uses.
- *Front Lot Line* - Current definition has resulted in lot line irregularities, inconsistencies with neighbouring parcels, and interpretations which do not reflect the intent of the definition.
- *Condominium Unit* - Loss of tourist accommodation and non-lawful residential use which are the result of a definition which is unclear and very problematic from an enforcement perspective.
- Structure - Current definition not clear on what is considered to be a structure and has led to confusion and inconsistent interpretation. Examples are retaining walls, water cisterns, shipping container, heat pumps, and hot tubs.

General Regulations	**The following focus areas have been identified for review.**

- *Building and Structure Height* - maximum heights that are less than surrounding jurisdictions and inconsistency in how height is measured in flood plains.
- *Food Trucks* - Bylaw 500 does not provide direction with respect to Food Trucks which creates uncertainties and inconsistencies.
- *General Setback Review* - Setback regulations in Bylaw 500 are overly complex and apply to a full range of buildings and structures. This has resulted in inconsistent interpretations and requested variances. There are no specified minimum setback requirements adjacent to RDN or provincial park land.
- *Home Based Business* - The Home Based Business regulations are unclear on emerging or in-demand uses that require significant parking; not clear on short term rentals; not clear on food-related uses and medical services.
- *Keeping of Animals* - **2019 Operational Plan Action – Review Household Poultry regulations.**
- *Parking Stall Setbacks* – no parking is currently allowed in setbacks; impractical to apply minimum setback requirements to parking stalls located on small residential lots.
- *Secondary Suites* - **2019-2020 Operational Plan Action – Review secondary suite requirements – building standards and parcel size.** Unclear on location for attached suite and size of parcel for detached suite.
- *Setbacks within strata developments* - Bylaw 500 does not provide adequate setback requirements for strata developments. Clarification is required to ensure that minimum setback requirements in both building strata and bare land strata developments are well defined.
- *Split Zoned Property Regulations* - The current language is unclear and is difficult to interpret in a consistent manner.
- *Watercourse Setback Requirements* - Watercourse setbacks are currently dependent on both slope and watercourse width which in many cases requires applicants to obtain a surveyor to determine the applicable setback. Simplification of watercourse setbacks could achieve equivalent results, improved bylaw efficiency, and reduced costs for applicants.

Land Use Zones	**The following focus areas have been identified for review.**

- *Floor Area Ratio* – in some zones there is a conflict between parcel coverage and floor area ratio

Phase One: Clarification and Housekeeping	
Focus Areas:	
• *Horne Lake Comprehensive Development Zone 9* - The complexity of this zone has resulted in significant difficulties with respect to administration and enforcement. In addition, this zone is extremely challenging for property owners.	
• *Industrial and Commercial Zones Review* - The industrial and commercial zones are not well defined and do not reflect current market demand. This has resulted in overlap between zones and a number of zoning amendment applications for uses considered appropriate within the affected zoning designation.	
• *Minimum Site Area Requirements* - The minimum site area requirements have no practical basis and are no longer relevant given current site servicing requirements and universal building inspection.	
• *Parcel coverage in the Agriculture 1 (AG1) Zone* - There are a number of small parcels located in the AG1 zone that, based on 10 % parcel coverage can not support an average sized dwelling unit.	
• *Residential 5 (RS5) Zone review* - Single detached dwelling units are being constructed contrary to the intent of the RS5 zone which is to require attached forms of housing.	
• *Zone Classifications* - Bylaw 500 contains a number of zones which are very similar. Having fewer zones would help ease administration and simplify the bylaw.	
Other Sections	**The following focus areas have been identified for review.**
• *Off-street parking and loading spaces* - Current parking and loading requirements are out of date. In addition, there are a number of permitted uses without prescribed minimum parking requirements.	
• *Landscaping requirements* - The landscaping requirements no longer reflect industry standard and do not reflect the context, type, and scale of development.	
• *Subdivision for a relative* - Bylaw 500 is currently *ultra vires* as it regulates the minimum parcel size of the new parcel being created rather than the minimum parcel size of the parent parcel to be eligible to be subdivided as per the *Local Government Act*.	
• *Regulation of Signs* - **2019-2020 Operational Plan Action –Complete sign bylaw review to support community kiosks, community identification and wayfinding signage. The current regulations no longer reflect best practices or industry standards and do not support the range of uses permitted on parcel.**	

Phase Two: Housing (Green Buildings and Affordability) and Land Use Contracts
Focus Areas:
Shipping Containers
Temporary buildings and structures
Tiny Homes/Park Models
Living in Recreational Vehicles on a Temporary Basis
Building Strata Developments
Land Use Contracts

Phase Three: Other
Focus Areas:
Campground Regulations and Standards
Residential Mobile Home Park Regulations and Standards
Water bottling
Park Zoning
Setback Exemptions

Attachment 3
Engagement Policy

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REGIONAL DISTRICT OF NANAIMO

P O L I C Y

SUBJECT:	***Public Engagement Policy***	POLICY NO: CROSS REF.:	**A1.23**
EFFECTIVE DATE:	**February 25, 2020**	APPROVED BY:	**Board**
		PAGE	1 OF 4

A. Purpose

To establish a framework for public engagement at the Regional District of Nanaimo (RDN).

B. **Policy**

The engagement goals of the RDN are:

- That RDN engagement is effectively managed, clear and responsive to the diverse needs of residents.
- The RDN considers the views and interests of residents when developing policies, programs, services and initiatives.

The RDN is committed to improving communication or engagement with residents and stakeholders using a collaborative, transparent and authentic approach. To help build these relationships, an open and meaningful approach will be developed on a case-by-case basis on a variety of plans, projects and initiatives.

Commitment to Engagement: The RDN recognizes the value that public engagement provides and recognizes that:

- People desire to participate in decisions that affect them,
- Effective participation facilitates understanding, and
- Effective participation improves decisions.

The RDN supports effective public engagement (also referred to as participation) which is based on three foundations of engagement:

a) **Values-based**: meaningful participation is focused on talking to people about what matters most to them and what matters most to you.

b) **Decision-oriented**: outlining the scope of issues under discussion to purposefully come to a conclusion or decision over the course of a process.

c) **Goal-driven**: outlining the public's role and potential to influence the issues under discussion with clear objectives of what will be achieved. For example, information is communicated, input or feedback is sought or collaborative development is desired.

This policy applies to all employees, volunteers and contractors of RDN. Consultation and engagement with First Nations communities occurs independently from the engagement of the broader public and requires a customized approach.

The RDN uses the International Association of Public Participation (IAP2) model as the foundation for planning and delivering engagement. IAP2 is an international association whose mission is to advance and extend the practice of public participation through professional development, certification, standards of practice, core values, advocacy and key initiatives with strategic partners around the world. The spectrum below will identify the purpose of engagement and the activities to achieve the engagement goals for each project.

IAP2 Spectrum of Public Participation

IAP2's Spectrum of Public Participation was designed to assist with the selection of the level of participation that defines the public's role in any public participation process. The Spectrum is used internationally, and it is found in public participation plans around the world.

iap2 international association for public participation

	Inform	Consult	Involve	Collaborate	Empower
Public Participation Goal	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	To obtain public feedback on analysis, alternatives and/or decisions.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision making in the hands of the public.
Promise to the Public	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.

Engagement Planning: Engagement must be done with a purpose and must be organized. Engagement is not required for every project, but elected officials and staff should consider whether it is needed at the commencement of all RDN projects and initiatives. Where engagement is required, an engagement plan should be developed that identifies the level of spectrum that will be used at each phase of the project. This plan provides order, structure, and sets expectations for how input will be used.

Engagement plans will be developed at an early stage in a project and may adopt a multi-phased approach to public engagement that employs different levels of the IAP2 spectrum throughout the process.

All RDN departments will allocate appropriate working time for staff to develop and execute engagement plans and activities.

Procedure

Training: To develop capacity, enhance consistency, and strive for continuous improvement, training in IAP2 and/or engagement tools will be made available to staff. There are various levels and types of training; certain staff may be required to complete deeper training if their jobs entail significant interaction with the public. All RDN departments will allocate appropriate resources and budgets for training.

Budget: To ensure adequate resources to implement this policy, an engagement budget line will be considered for all major projects or initiatives.

Implementation: This policy will be implemented through a more detailed Engagement Strategy and Toolkit, which outlines best practices to planning, implementing and evaluating effective and meaningful engagement.

C. RESPONSIBILITES

RDN Elected Officials:

- Represent residents and connect with them to determine top priorities for engagement.
- Prioritize engagement efforts by working with staff to identify areas where public input can make a meaningful difference to decisions and help set public engagement priorities.
- Help promote engagement initiatives and opportunities in order to ensure a high rate of participation by a wide range of residents.
- Direct residents to the established processes for garnering, monitoring and compiling input, and avoid circumventing these.
- Permit staff to take the lead role in identifying best practices and methods for engaging the public on various issues.
- Consider input gathered from residents and stakeholders when making decisions and clarify the rationale for decisions reached.
- Ensure time and resources are allocated to support successful engagement efforts.

The RDN staff:

- Plan and deliver training opportunities for staff.
- Assist with development of, review and approve all RDN engagement plans.
- Provide engagement advice and support to the organization.
- Consider, for all projects, whether engagement should be conducted.
- Ensure all projects with engagement comply with the Engagement Policy and Workbook.
- Seek advice, support and approval from Corporate Communications as required.
- Allocate staff time and resources for training.
- Work with elected officials to identify where public input can make a meaningful difference to decisions, program development and service delivery.
- Establish channels and processes to clearly identify community priorities for engagement, then ensure that the organization responds.

- Establish and communicate on engagement priorities, then apply a consistent set of policies and procedures in designing and implementing engagement activities.
- Consult with elected officials and consider previous public feedback regarding engagement priorities, process design, framing issues for productive input, effective communications, and increasing engagement over time.
- Ensure timely and respectful communication with all those who engage and show how their input has been used to influence decisions, programs and services.
- Engage in ongoing learning and professional development about public engagement best practices.
- Ensuring that community input is well documented, and that communication efforts are as complete and well-timed as possible.

Attachment 4
Engagement Toolkit

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Regional District of Nanaimo

Building *Our Community* Together

Public Engagement Strategy & Toolkit

Public Engagement

Strategy

Introduction

Our communities are constantly changing, and the expectations of our residents are evolving. How people share information, and the opportunities for involvement in decision-making, are changing too. Meaningful public engagement facilitates better conversations between government and residents so we can be responsive to the needs and wants of the people we serve.

What is Public Engagement?

Public engagement, also commonly referred to as public participation, is any process that involves the public in problem-solving or decision-making. It is premised on the belief that residents should have meaningful opportunities to engage in the decisions that affect their communities. It moves past one-way communication and welcomes residents into the decision-making process by ensuring timely information and awareness of opportunities to provide input before decisions are made.

Not all topics require the same level of public engagement. Based on the impact of the decision or change, and the input that is needed to inform the decision, different tools and techniques are considered in each instance.

Why do We Engage?

We engage because, although we have skilled technical experts working across our organization, no one knows the community and its nuances better than the people living and doing business in it every day. When we engage, their input becomes part of the decision-making process, helping elected officials, residents, and staff create communities that are responsive to what the community has indicated as important to them.

When public engagement is meaningful, everyone gains something valuable. Governments benefit from hearing diverse perspectives and understanding the public's interests, concerns, and priorities, and the public gains a greater understanding of roles, responsibilities and requirements. With increased communications, our accountability to residents is enhanced. By providing timely access to quality information, there is less misinformation, and residents feel heard.

What is The International Association of Public Participation (IAP2)?

IAP2 Canada is an association of professionals in the field of public participation who seek to advance and extend the practice of public participation through training, certification, standards, values, and advocacy around the world.

The IAP2 developed a number of tools that have become commonplace amongst local governments. The Core Values and Spectrum of Public Participation assist in establishing clear expectations and defining the level of participation in any public engagement process.

Core Values for the Practice of Public Engagement

1. **Public engagement** is based on the belief that those who are affected by a decision have a right to be involved in the decision-making process.
2. **Public engagement** includes the promise that the public's contribution will influence the decision.
3. **Public engagement** promotes sustainable decisions by recognizing and communicating the needs and interests of all participants, including decision makers.
4. **Public engagement** seeks out and facilitates the involvement of those potentially affected by or interested in a decision.
5. **Public engagement** seeks input from participants in designing how they participate.
6. **Public engagement** provides participants with the information they need to participate in a meaningful way.
7. **Public engagement** communicates to participants how their input affected the decision.

IAP2 Spectrum of Public Participation

IAP2's Spectrum of Public Participation was designed to assist with the selection of the level of participation that defines the public's role in any public participation process. The Spectrum is used internationally, and it is found in public participation plans around the world.

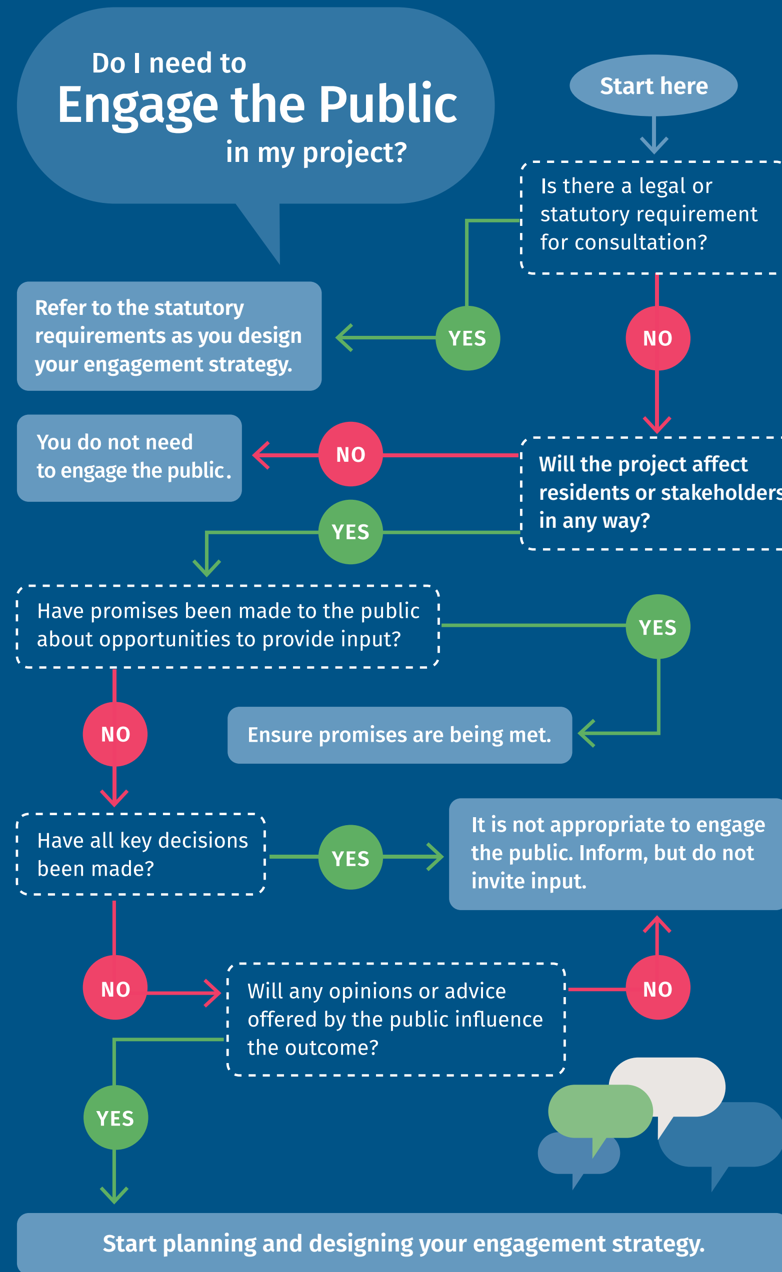
	Inform	Consult	Involve	Collaborate	Empower
Public Participation Goal	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	To obtain public feedback on analysis, alternatives and/or decisions.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision making in the hands of the public.
Promise to the Public	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.

When Do We Engage?

Whether the public needs to be engaged in a decision should be a critical consideration when developing any new project or considering changes to a service or program. Public engagement may not be required or suitable in every case, but when it is, we want to ensure we are engaging with residents as early as possible. When engagement does not occur or is rushed, there may be negative impacts to the project schedule, costs, and public support. Early dialogue is important in determining when and to what extent public engagement is needed.

In British Columbia, the *Community Charter* and *Local Government Act* outline the minimum requirements for when local governments **must** engage. Generally, these are regarded as the **minimum** requirements and should often be exceeded.

> *Early dialogue is important in determining when and to what extent public engagement is needed.*



How Do We Engage?

1

Plan

- Assess the need for engagement or determine the level of community impact
- Determine engagement objectives
- Identify stakeholders

2

Design

- Determine the strategy
- Choose techniques
- Develop key messages
- Create an engagement plan
- Establish measures and timelines

3

Promote

- Tell your story
- Invite participation

4

Connect

- Execute engagement plan
- Host events/open houses
- Gather input

5

Evaluate

- Evaluate the process

6

Close the Loop

- Report on feedback

Who Do We Serve? A Community Snapshot

REGIONAL DISTRICT OF NANAIMO

First Nations territories:
Snuyneymuxw, Snaw-naw-as and Qualicum First Nations

Size of community (square kilometres): 2,038 km^2

Average household income: $48,469

Ownership vs. rental
Own: 50,930
Rent: 17,900

Language: 99.5% of residents speak and understand the English language

Average education level:
Post-secondary certificate, diploma or degree

3 largest industries
Construction, retail, professional scientific and technical

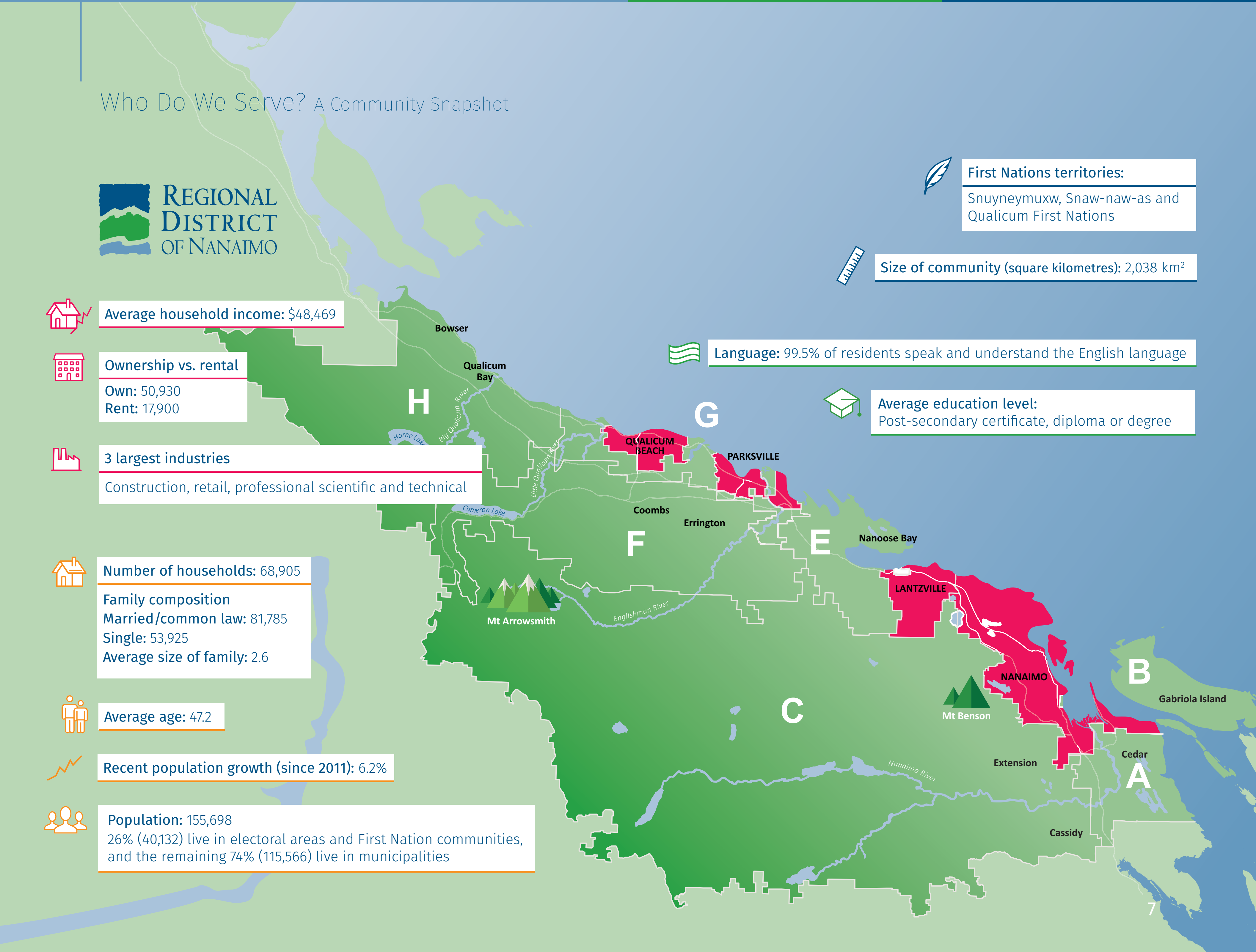
Number of households: 68,905

Family composition
Married/common law: 81,785
Single: 53,925
Average size of family: 2.6

Average age: 47.2

Recent population growth (since 2011): 6.2%

Population: 155,698
26% (40,132) live in electoral areas and First Nation communities, and the remaining 74% (115,566) live in municipalities



Roles And Responsibilities: Who Does What?

Elected Officials

Elected officials are formally responsible for making decisions that represent the interests and values of the community. They have an important role as decision-makers and advocates for public engagement and can contribute in the following ways:

- Represent residents and connect with them to determine top priorities for engagement.
- Prioritize engagement efforts by working with staff to identify areas where public input can make a meaningful difference to decisions and help set public engagement priorities.
- Help promote engagement initiatives and opportunities in order to facilitate a high rate of participation by a wide range of residents.
- Direct residents to the established processes for garnering, monitoring and compiling input, and avoid circumventing these.
- Permit staff to take the lead role in identifying best practices and methods for engaging the public on various issues.
- Consider input gathered from residents and stakeholders when making decisions and clarify the rationale for decisions reached.
- Ensure time and resources are allocated to support successful engagement efforts.

Staff

Staff lead the planning, implementation and reporting back from engagement initiatives. As trained professionals, staff members are responsible for developing and applying professional expertise in the area of public engagement, as well as being technical experts that provide background and advice on decisions being made. Staff responsibilities include the following:

- Work with elected officials to identify where public input can make a meaningful difference to decisions, program development and service delivery.
- Establish channels and processes to clearly identify community priorities for engagement, then ensure that the organization responds.
- Establish and communicate engagement priorities, then apply a consistent set of policies and procedures in designing and implementing engagement activities.
- Consult with elected officials and consider previous public feedback regarding engagement priorities, process design, framing issues, effective communications, and increasing engagement over time.
- Ensure timely and respectful communication with all those who engage, and show how their input has been used to influence decisions, programs and services.
- Engage in ongoing learning and professional development about public engagement best practices.
- Ensure that community input is well documented and that communication efforts are as complete and well-timed as possible.

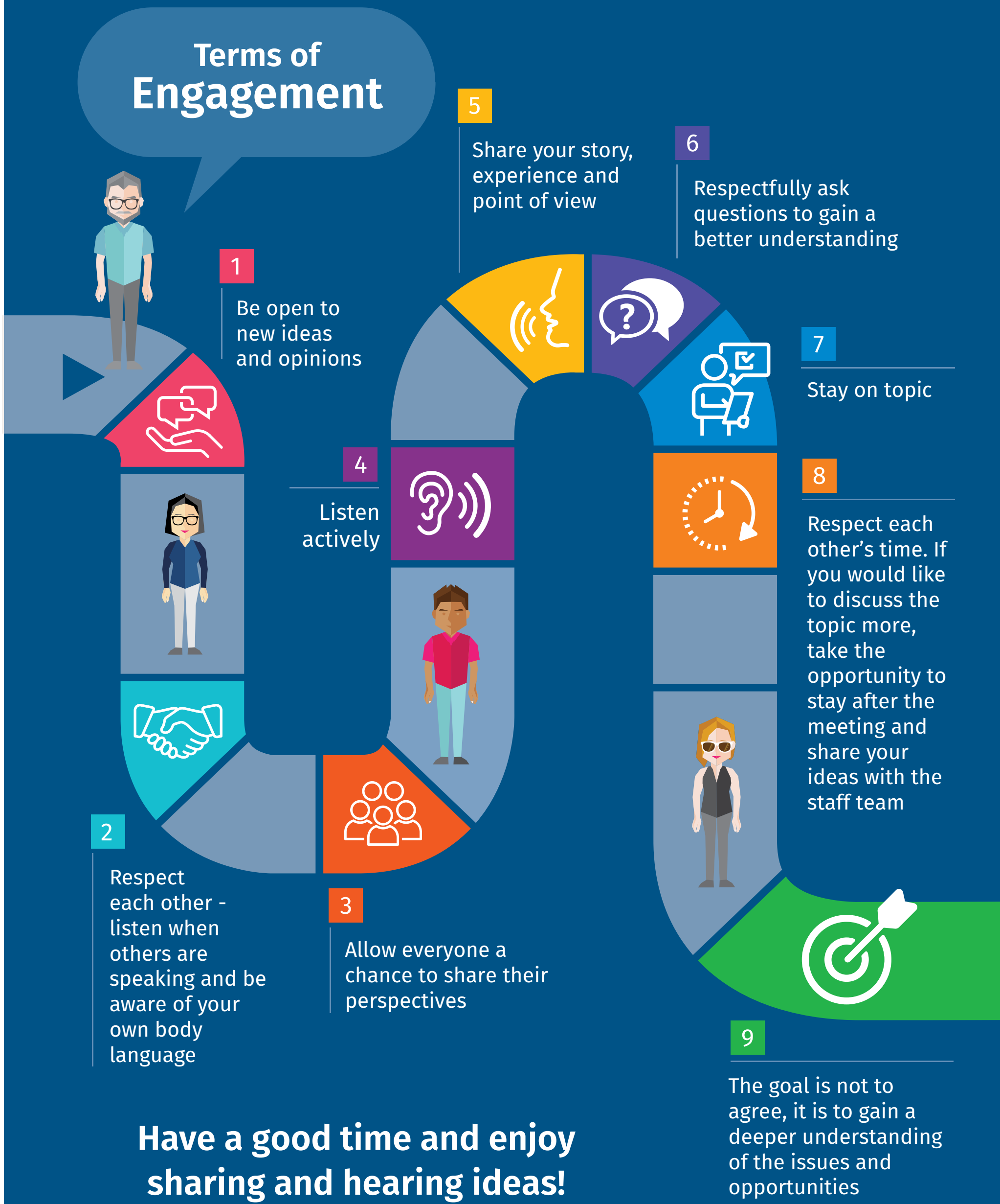
Residents

Residents contribute to informed decision-making and the quality of life in their community by sharing their ideas, experiences, and concerns in a constructive and respectful way. Their contributions can include the following:

- Help identify community needs and priorities.
- Identify barriers to participation.
- Make efforts to stay current and learn more about issues within the community.
- Participate in engagement initiatives and encourage others to participate.
- Express their point of view and contribute ideas while respecting opposing perspectives in a respectful way.
- Be willing to listen to and learn from other community members.
- Vote in local government elections.

First Nations

Consultation and engagement with First Nations communities occurs independently from the engagement of the broader public and requires a customized approach.



Thank You

The Regional District of Nanaimo, Comox Valley Regional District, Cowichan Valley Regional District and the City of Courtenay, would like to acknowledge and extend thanks to the many Canadian communities from which we drew inspiration, ideas, and best practices during the development of this strategy.

We came together as four local governments to develop an engagement strategy and toolkit that establishes a common language and approach to our engagement efforts and provides practical tools for our respective staff and communities to engage in a meaningful way.

Regional District of Nanaimo

Comox Valley Regional District

City of Courtenay

CVRD

Public Engagement

Toolkit

Why is an Engagement Toolkit Important?

An engagement toolkit helps the RDN establish a consistent approach to our public engagement efforts. It helps ensure that our staff and consultants are coordinated and proactive in their engagement approach, providing a more seamless and predictable experience for our residents.

Together with the Cowichan Valley Regional District, the Comox Valley Regional District, and the City of Courtenay, we built a toolkit inspired and informed by best practices, lessons learned across the public sector, and input from staff within each organization. The toolkit includes templates and tools that will help us build organizational capacity for more effective public engagement and foster two-way conversations with our community.

It is important to remember that proper public engagement takes time and dedication. Proper engagement should not be completed off the side of your desk nor be a quick box you check to show you completed a project. It needs to be meaningful, genuine and have purpose.

This toolkit is to help guide you through your engagement planning process. Much of the guide is meant to be helpful information and resources, and the steps that are mandatory are also noted. The Engagement Coordinator is able to assist you in developing your plans, answer questions, and must review and approve your plans in order to ensure the project goals are met. It is important everyone is aware of what steps go into proper public engagement and have the time and budget dedicated to executing the strategies effectively.

Before conducting or developing any public engagement process please review and become familiar with the RDN Board approved Public Engagement Policy.

Download RDN Public Engagement Policy

Planning for Success: How We Engage

A successful public engagement process involves six key steps:

1 Plan
- Assess the need for engagement or determine the level of community impact
- Determine engagement objectives
- Identify stakeholders

2 Design
- Determine the strategy
- Choose techniques
- Develop key messages
- Create an engagement plan
- Establish measures and timelines

3 Promote
- Tell your story
- Invite participation

4 Connect
- Execute engagement plan
- Host events/open houses
- Gather input

5 Evaluate
- Evaluate the process

6 Close the Loop
- Report on feedback

How-To:

Plan

1. Determining Scope*
2. Stakeholder Identification
3. Stakeholder Mapping

Design

4. Engagement Techniques
5. Engagement Tools
6. Removing Barriers
7. Key Messaging
8. Budgeting for Effective Public Engagement
9. Engagement Plan Highlights**

Promote

10. Social Media
11. Writing for The Web
12. Writing Style Guide

* Mandatory for all projects with engagement. Must be completed prior to meeting with the Engagement Coordinator or drafting the Engagement Plan.

** Mandatory for all projects with engagement. Draft shared with and final plan approved by the Engagement Coordinator.

*** Mandatory for all projects with engagement. Final evaluation shared with the Engagement Coordinator.

Connect

13. First Nations Territorial Acknowledgement
14. Event Checklist and Plan
15. Facilitation Tips and Checklist
16. Helpful Event Forms and Templates

Evaluate

17. Participant Post-Event Evaluation
18. Staff Engagement Evaluation***

Close the Loop

19. Engagement Summary Report**

Helpful Links

- RDN Public Engagement Policy
- RDN Communications Policy
- RDN Media Guidelines
- RDN Social Media Guidelines
- RDN Graphic Standards and Logos
- RDN Advertising Templates and Guide
- RDN Communications Sharepoint

Plan

1. Determining Scope

MANDATORY COMPLETION OF SCOPE for all projects with engagement. Must be completed prior to meeting with the Engagement Coordinator or drafting the Engagement Plan.

These questions can be used to guide discussions, or to prepare an initial engagement scope. They will then inform the engagement plan template. Answering these questions and determining your scope must be completed before an initial meeting with the Engagement Coordinator prior to the development of a project Engagement Plan.

- **What is the decision to be made?**

- **Who is affected by the decision being made?**

- **What is the potential interest each stakeholder will have in the decision?**
- **Which departments need to be aware/involved in the decision-making process?**

- **What elements of the decision can be informed by public input?**

- **Which elements will not be informed by public input?**

- **What information will those affected or interested need to participate?**

- **How do these stakeholders typically receive information?**

- **How do these stakeholders typically like to provide input?**

- What risks are involved in involving stakeholders in this decision?

- How much time is needed to facilitate public engagement? (include notification, invitation, events, data analysis, reporting)

- Have we allocated budget for public engagement efforts? (e.g. advertising, venue rental, catering, print and display materials, overtime, consulting fees)

- What other issues or topics could come up?

- Are there opportunities to integrate other questions or issues in the same engagement process?

- **What does “success” or meaningful public engagement look like in the context of this project?**

- **How will we know if we have been successful in attaining meaningful public engagement for this project?**

When thinking about when best to engage, there are certain things to consider:

- Consider how to gain internal commitment early within your department and with senior management
- Look for existing opportunities to engage your audience (e.g. regular meetings)
- Think about times/events where there are many people in one place (e.g. festivals)
- Prioritize your audience’s convenience over your own
- Seek out a representative amongst your selected public and ask them for advice
- Avoid busy times and seasons such as summer vacations, stat holidays, religious holidays, and spring break
- Provide plenty of notice to potential participants (two to three weeks is the minimum public notice required)
- Consider potential conflicts or bridging opportunities with other community events and engagement activities

2. Stakeholder Identification

There are a variety of people or organizations that might be impacted or interested in the decision or project at hand.

It is important to remember that any issue or decision can affect different people in different ways. Anticipating the various people that might be interested or affected helps inform project planning, including stakeholder information needs, and determines which engagement techniques might be considered.

The Engagement Coordinator is an internal stakeholder that is required to be part of the discussions and planning from the beginning of the project. It is important to consider all other internal stakeholders when identifying your stakeholder list and how they may be affected by the project.

- **Who has a direct stake in the decision?**

- **Who may be indirectly impacted?**

- **Who might be impacted that we don't typically hear from?**

- **Who has the influence to enable or inhibit the decision?**

- **Who has influence and access to networks that would enhance the engagement process?**

Stakeholder Identification Checklist

Individuals: *(Examples)*

- [ ] Residents (various socioeconomic, geographic locations, gender, age, household compositions)
- [ ] Property owners
- [ ] Indigenous people – if identified, customized plan needs creating
- [ ] Visitors
- [ ] Youth
- [ ] Seniors
- [ ] Persons with disabilities
- [ ] Parents of school-aged children
- [ ] Pet Owners
- [ ] Others:

Business and Economic Groups: *(Examples)*

- [ ] Business owners
- [ ] Employees and employee groups
- [ ] Industry groups
- [ ] Business associations
- [ ] Development associations
- [ ] Chamber of Commerce
- [ ] Colleges and universities
- [ ] Large employers
- [ ] Others:

Government Bodies: *(Examples)*

- [ ] School Districts
- [ ] Police
- [ ] Fire services
- [ ] Emergency Management
- [ ] Coast Guard
- [ ] Ambulance
- [ ] Neighbouring municipalities
- [ ] Federal Government
- [ ] Provincial Government
- [ ] Health Agencies
- [ ] BC Transit
- [ ] Social service providers
- [ ] Others:

Advocates: *(Examples)*

- [ ] Neighbourhood or Community Associations
- [ ] Heritage Groups
- [ ] Transportation groups (cycling, accessibility, walking, taxi association)
- [ ] Sports and recreation groups
- [ ] Sports associations
- [ ] Special event organizers
- [ ] Arts and culture groups
- [ ] Environmental groups
- [ ] Others:

Tailoring Your Efforts: Stakeholder Needs

It's important to anticipate the information stakeholders will need and determine how best to engage them in the early stages of the decision-making process.

There are a number of questions that will assist in understanding where stakeholders are starting from:

- **What do they care most about?**
- **What are they most concerned about?**
- **Have they engaged in the past?**

- **What was the stakeholders' engagement experience?**

- **How do they like to receive information?**

- **What barriers may exist to their engagement?**

- **How have they typically provided input or participated in the past?**

The table below outlines an example of how you might anticipate stakeholder needs and corresponding engagement activities for stakeholders to ensure they are aware of opportunities, have the information they need to participate fully, and have activities designed to meet their needs. This can be a useful tool when developing an engagement plan and when reporting back on how specific stakeholders were engaged.

Examples:

Stakeholder	Interests	Desired information	Engagement activities
Neighbourhood Association	✓ Land-use ✓ Changes in neighbourhood ✓ Costs to taxpayers ✓ Neighbourhood involvement ✓ Timing of proposed changes	✓ Background reports ✓ Recent data ✓ Board decisions ✓ Visuals of proposed options	✓ Website ✓ Direct invitation to President to participate ✓ Presentation at upcoming annual general meeting ✓ Survey to all members ✓ Workshop ✓ Booth at a neighbourhood market
Business Owners	✓ Economic vitality ✓ Changes to business district ✓ Tax rates ✓ Timing of proposed changes ✓ Land-use ✓ Construction impacts	✓ Background reports ✓ Recent data ✓ Board decisions ✓ Visuals of proposed options ✓ Tax impact	✓ Website ✓ In-person visit from key staff to affected businesses ✓ Presentation to business improvement association or Chamber of Commerce ✓ Survey to all members
Not-for-Profit Sports Associations	✓ Sports facilities ✓ Rental rates ✓ Recreational program or policy changes	✓ Background reports ✓ Recent data ✓ Board decisions ✓ Visuals of proposed options ✓ Rate schedules ✓ Approved policies	✓ Website ✓ Letter to Association Board requesting feedback on proposed changes ✓ Clear point of contact ✓ Email channel ✓ Information for association newsletter ✓ Survey to members ✓ Interactive pop-up event at sporting event ✓ Social media directed at parents of sport teams ✓ Signage promoting web survey in sporting facilities

3. Stakeholder Mapping

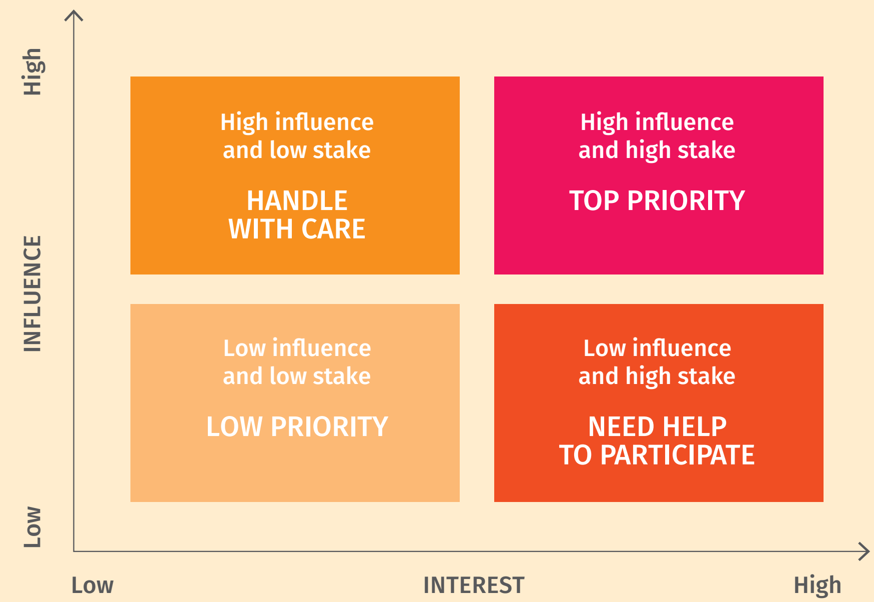
Once you have identified potential stakeholders, it is important to anticipate how stakeholders might be impacted or interested in a decision.

An example of a mapping exercise involves gathering key project staff and identifying stakeholder interests and influence. The placement of stakeholders within the four quadrants will inform strategies tailored to each stakeholder group's needs.

1. **Create** the matrix on a wall or a large piece of paper.
2. **Brainstorm** all the groups who might be involved or interested in your decision or project. Write their names on sticky notes. (One note per name)
3. **Place** the sticky notes on the matrix, considering both their level of influence (low to high) and their likely level of interest (low to high).
4. **Decide** how best to meet the needs of those identified based on their interest and influence

> *When you use the opinions and influence of your most powerful stakeholders, the project will be better equipped for success.*

Stakeholder Mapping Matrix



Source: Consultation Institute

Design

4. Engagement Techniques: Determining the best tool for the job

IAP2 Spectrum of Public Participation

The IAP2 spectrum helps determine the level of engagement a decision or project requires and helps establish clear objectives and commitments for how public input will affect the decision. The spectrum increases the level of engagement from left to right, with increasing expectations of public impact, participation, and costs as you move to the right towards Empower. The tools and techniques are determined by the public participation goal or objective.

	Inform	Consult	Involve	Collaborate	Empower
Public Participation Goal	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	To obtain public feedback on analysis, alternatives and/or decisions.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision making in the hands of the public.
Promise to the Public	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.
Example Tools	• Fact sheets • Websites • Open houses	• Public comment • Focus groups • Surveys • Public meetings	• Workshops • Deliberate polling	• Citizen Advisory committees • Consensus building • Participatory decision-making	• Citizen juries • Ballots • Delegated decisions

5. Engagement Tool Samples

Technique	IAP2 Spectrum	Description	Cost
Project website/ web page	Inform	A centralized online location to find information related to the project.	No direct cost to project but requires staff time to ensure it remains current. All public events are to be posted on the RDN website calendar.
Social media • **Facebook** • **Twitter** • **Instagram** • **LinkedIn**	Inform	Social media helps connect information with people. Social media is an immediate way to share information with large numbers of people and provide information that can be easily shared by others. Social media is another way of monitoring public commentary and assessing or responding to misinformation.	No direct cost to project but requires staff time to draft, post and monitor comments. Engagement Coordinator can assist with posting as needed.
Online engagement – Get Involved RDN	Inform Consult Involve	Get Involved RDN is an online engagement tool to be utilized for all engagement projects. It allows for two-way communication opportunities. It's not intended to replace in-person engagement but enhance. The tool helps bring the conversation off social media and onto a platform that provides a more interactive and respectful discussion. The tool also allows for detailed analytics and the use of various tools to gather input.	No direct cost to project but requires staff time to ensure remains current. All public events are to the posted on the Engagement Calendar which is separate from the RDN website calendar. Engagement Coordinator sets up and publishes all new project pages.
Information booths at events	Inform	A display where project information is available and may be interactive to solicit input.	Cost range depending on event scope.
Promotional video	Inform	Short videos suitable for online distribution. They can be used to educate, inform or promote.	Cost ranges from $2000-10,000 depending on the length, style and scope. Connect with the Engagement Coordinator to discuss ideas for video creation and for final approvals.
News release	Inform	Used to inform media of an issue, an event or project.	No direct cost to project but requires staff time to draft and work with the Communications Coordinator for approvals.
Fact sheets, FAQs	Inform	Provide commonly requested information about a particular issue or project, usually 1-2 pages and available online or in print.	Can be done in house if staff have design skills. Can be done by a consultant. Printing and distribution costs vary. Ensuring they are graphically appealing is recommended.
Newsletter	Inform	Community members and stakeholders can sign-up to receive updates and stay informed about projects.	Can be done in house if staff have design skills. Can be done by a consultant. Printing and distribution costs vary. Ensuring they are graphically appealing is recommended.
Presentation	Inform	Organizing frequent and informative presentations throughout the community is an excellent way of building relationships and doing outreach.	No direct cost to project but requires staff time to draft. An RDN presentation template is recommended for use.

Technique	IAP2 Spectrum	Description	Cost
Surveys (telephone, mail-in, online)	Consult	Use to obtain data on opinions, concerns, issues, satisfaction levels.	Online surveys are of no direct cost to the project using the projects Get Involved RDN page. Staff are to design with the Engagement Coordinator. Include promotion costs. Can be done by a consultant. Recommended for telephone survey.
Focus groups	Consult	Small, often representative or specifically selected groups that are facilitated to test ideas or messages and gauge perceptions and opinions.	Cost range depending on scope.
Pop-up booth	Consult	Provide a temporary physical presence and a way to reach your audience directly. They can educate, raise awareness, and create an opportunity for residents to ask questions of staff or provide feedback.	Cost range depending on scope. May include promotion costs.
Open house	Consult	An advertised public event where residents can access materials, plans and exhibits. Staff and technical experts are available to answer questions, and stakeholder feedback can be collected through one-to- one discussion or interactive display boards or stations.	Cost range depending on scope. Include costs for promotion, venue, AV, snacks, presentation boards/materials. Can be done with a consultant.
Community meeting	Consult	Special interest meetings with local community groups, business, institutional or industry stakeholders.	Cost range depending on scope. Include costs for promotion, venue, AV, snacks, presentation boards/materials. Can be done with a consultant.
Public hearing	Consult	Official meetings where individuals or groups are invited to share their views on an agenda item. Typically, a formal meeting with legislated requirements. Used to satisfy regulatory requirements such as bylaw readings and land-use matters. Dialogue is time-limited, and comments are recorded.	Cost range depending on scope. Include costs for promotion, venue, AV, snacks, presentation boards/materials.
Study circle	Involve	A small, diverse group of 8-12 people who meet for about two hours per week for four to six weeks to address issues in a collaborative way. Led by a central facilitator, people consider the issue from many points of view resulting in strategic actions.	Cost range depending on scope. Include costs for promotion, venue, AV, snacks, presentation boards/materials. Can be done with a consultant.
Workshop	Involve	A facilitated meeting or conference to discuss a particular topic. May involve multiple speakers and multiple aspects of the topic and results in recommendations or potential solutions.	Cost range depending on scope. Include costs for promotion, venue, AV, snacks, presentation boards/materials. Can be done with a consultant.
Site visit	Involve	Tours of an area or project site led by a project manager or another well informed employee or consultant, for stakeholders, community members, media and elected officials to gain a greater understanding of issues and implications.	Cost range depending on scope. Include transportation costs as needed.

Technique	IAP2 Spectrum	Description	Cost
Design charrettes	Involve	Charrettes are designed to encourage the participation of all. They are an intensive planning session where residents, designers and others collaborate on a vision for development. It provides a forum for ideas and offers the unique advantage of giving immediate feedback to the designers. More importantly, it allows everyone who participates to be a mutual author of the plan.	Cost range depending on scope. Include costs for promotion, venue, AV, snacks, presentation boards/materials. Can be done with a consultant.
World cafés	Involve	An informal conversational process intended to facilitate open and intimate discussion around a certain topic. Working off predetermined questions, participants change tables during the process and focus on identifying common ground in response to each question.	Cost range depending on scope. Include costs for promotion, venue, AV, snacks, presentation boards/materials. Can be done with a consultant.
Deliberative polling	Involve	A random, representative sample is first polled on a targeted issue. After this baseline poll, members of the sample are invited to gather at a single place for a day to discuss the issues.	Cost range depending on scope.
Advisory committee	Collaborate	A group of stakeholders or representatives of stakeholder groups that provide input on a project or initiative. Requires staff support for terms of reference, selection, meeting agenda and minutes and reporting purposes.	Cost range depending on scope. Include costs for promotion, venue, AV, snacks, presentation boards/materials. Can be done with a consultant.
Task force	Collaborate	A group of stakeholders or representatives of stakeholder groups with Terms of Reference and a limited timeline that provide input on a specific project or issue. Requires staff support for terms of reference, selection, meeting agenda and minutes and reporting purposes.	Cost range depending on scope. Include costs for promotion, venue, AV, snacks, presentation boards/materials. Can be done with a consultant.
Open space meeting	Collaborate	A participant led discussion ideal for encouraging participants to gain ownership of an issue and come up with solutions. Participants agree on the areas of discussion that have importance for them, and then take responsibility for facilitating the sessions.	Cost range depending on scope. Include costs for promotion, venue, AV, snacks, presentation boards/materials. Can be done with a consultant.
Participatory decision making	Collaborate	A large number of stakeholders (residents, staff, experts, etc.) come together to find a common ground or consensus on a solution that will benefit everyone. In a participative decision-making process, each individual has an opportunity to share their perspectives, voice their ideas and tap their skills to improve team effectiveness and efficiency. The group determines the result and it is implemented.	Cost range depending on scope. Include costs for promotion, venue, AV, snacks, presentation boards/materials. Can be done with a consultant.
Referendum or Alternative Approval Process (AAP)	Empower	The official choice in response to a specific question made by casting a ballot either in favour or opposing question provided.	Cost range depending on scope. Include costs for promoting.
Voting	Empower	The official choice made in an election by selecting candidates on a ballot.	Cost range depending on scope. Include costs for promoting.

6. Removing Barriers to Engagement

Inclusive engagement is about building strong and sustainable relationships within your community. One of the key components to making public engagement processes responsive, inclusive, and culturally appropriate is building the capacity of staff to understand the implications of age, gender, race, culture, and socio-economic status on public process.

Effective public engagement takes careful planning and acknowledgement that each population we work with provides a unique opportunity to broaden our understanding of what makes a community.

1. **Build personal relationships with target population**
   - [ ] Are there key individuals or constituents you already have or should be building a relationship with?

2. **Create a welcoming atmosphere**
   - [ ] Does your process reflect, honour, and welcome the community?
   - [ ] Do the venues you choose invite participation and engagement?

   Choose gathering places that are comfortable and that are conducive to the interactions that you want to have

3. **Increase accessibility**
   - [ ] Is the venue accessible to people with disabilities?
   - [ ] Is the venue accessible by various modes of transportation (buses, cyclists, pedestrians, etc.)?

   Are there other barriers or issues that should be considered?
   - [ ] Language
   - [ ] Time of day
   - [ ] Childcare
   - [ ] Power dynamics between and within community groups
   - [ ] Food/environmental allergies

4. Develop alternative methods of engagement

- [ ] Do you have non-traditional methods of outreach to get people involved?
- [ ] Do you offer multiple ways for contributing input and feedback?

5. Maintain a presence with the community

- [ ] Are there community driven events that you can participate in where people will already be gathering?
- [ ] Are there outside opportunities for you to meet community members and build relationships?

6. Partner with diverse organizations and agencies

- [ ] Are there organizations that currently have relationships with your target populations that you can connect with (remember to consider power dynamics)?

7. Developing Key Messaging

Consistent and plain language messages are critical to the success of the process. This information is what will help encourage the public to take interest and participate in the decision-making process and will be used to guide media interviews, social media, speaking remarks, and print materials.

Key messages summarize the issues or opportunity and should be:

1. **Clear**: Present the information in plain language and at an easy-to-understand, Grade 6 reading level.
2. **Concise**: Use brief, bulleted lists for quick understanding instead of wordy paragraphs.
3. **Concrete**: Convey factual information in a straightforward manner. Avoid speculation and take care to remove any bias.
4. **Correct**: Fact-check your copy carefully to ensure the information is accurate.
5. **Coherent**: Eliminate wordiness and technical jargon.
6. **Complete**: Check with people in other departments to ensure you have not missed key information.
7. **Courteous**: Be respectful of the time and effort participants are giving. All points of view are valuable.

Key Message Elements

- [ ] Develop three to five key messages
- [ ] Keep sentences short and create stand-alone sentences - provides less opportunity for the information to be taken out of context
- [ ] The basic elements of messaging should include the elements of the 5 W's and H: Who, What, When, Where, Why and How
- [ ] Provide context that compels the listener to care or want to learn more
- [ ] Reference where the strategic direction or context has come from (e.g. Official Community Plan, Strategic Priorities, Master Plan, Financial Plan etc.)

Key Message Tips

- Use simple words, avoid jargon or buzzwords
- Avoid qualifiers such as "I think," "I believe," "I feel," and "I hope" – makes the speaker sound uncertain
- Use active language, not passive
- Use words that help paint a picture in the listener's mind
- Avoid references to internal terminology such as projects, processes and programs
- Identify a few keys facts or data that support your key messages

Examples

- **Decision/Opportunity**: The regional district is considering options for upgrading a recreation facility and is seeking the public's input to inform their decision. Key messages will summarize the key components of the decision/opportunity, the decision makers, the timeline, and how the public can get involved.
- **Who**: The Regional District of Nanaimo is planning for the future of the Oceanside Arena, the oldest recreation centre in the region.
- **What**: The 80-year-old recreation centre requires significant investment to repair the building and continue to serve the needs of the neighbourhood. The community has grown and changed over the years, so it's important to hear from residents when planning for future investment.
- **When**: The Regional District of Nanaimo Board will decide how to proceed with improvements to the facility as part of the annual budgeting process this fall.
- **Where**: Citizens can learn more and provide input at a number of upcoming open houses and in an online survey at www.getinvolved.rdn.ca
- **Why**: Recreation facilities and programs support the health and well-being of our community. They create safe and affordable spaces to bring the community together. This facility has served generations of families in this neighbourhood, and as the community's needs change, so must the facility's.
- **How**: The RDN Board will have a number of considerations when deciding how to proceed. They will have to consider the condition of the building, overall community needs, affordability, and the input of facility patrons.

8. Budgeting for Effective Public Engagement

It is important to anticipate the costs associated with engaging the public and these should be outlined within the overall project budget. Also, when engagement efforts have not been funded appropriately there is risk to the overall project. Less than adequate engagement can potentially result in higher costs overall if there are delays or additional engagement is required.

Reflecting back to the IAP2 spectrum, the more intensive the engagement towards Empower, often higher the cost. The Engagement Coordinator can help ensure all costs are listed so the department can confirm the budget is appropriate.

Hard Costs	Proposed Budget	Final Costs
Consultants/contractors (if required) ■ Public engagement consultant ■ Communications consultant	$	$
Tools and techniques ■ Public opinion polls/surveys ■ Online surveys ■ Facilitators ■ Focus groups	$	$
Technical requirements ■ Computer analysis ■ AV equipment (podium, screens, speakers, laptop set-up and rental)	$	$
Logistics ■ Venue ■ Refreshments ■ Security/parking attendants ■ Tables and chairs ■ Interpreter (if required) ■ Insurance	$	$

Hard Costs	Proposed Budget	Final Costs
Communications ■ Advertising (print, online and radio) ■ Website development and maintenance ■ Print materials ■ Presentation materials ■ Signage	$	$
Subtotal	$	$
Soft Costs	**Proposed Budget**	**Final Costs**
■ Staff time ■ Special event costs (overtime or call-outs for set-up, deliveries, take down)	$	$
Subtotal	$	$
Other	**Proposed Budget**	**Final Costs**
	$	$
Subtotal	$	$
Total	$	$

9. Engagement Plan Highlights

MANDATORY COMPLETION OF HIGHLIGHTS & PLAN TEMPLATE (see link on following page)
Mandatory for all projects with engagement. Draft shared with and final plan approved by the Engagement Coordinator.

This high level summary is mandatory for all projects that have any level of engagement and will be included in staff reports to the Board. It will also be shared publicly on your project's **Get Involved** RDN page.

- **Engagement Objective**
  - Define the intention behind incorporating public engagement in this project.

- **Decision**
  - Explain the decision to be made and how public engagement will inform that decision.

- **Promote to the Public**

- Describe your commitment to the public and how their input will be used.
- Outline the level of public engagement based on the IAP2 spectrum (there may be different levels for different phases of the project).

- **Tools and Timeline**

- List who is affected by the decision (external stakeholders).
- Outline corresponding tools for reaching stakeholders and seeking their input and timing.

Download Full Engagement Plan Template

Promote

10. Social Media

Social media can be a powerful, efficient, and inexpensive way to inform the community. Through short, visual messages, the public can stay informed about the projects and issues that matter most to them, and they can share the information with their networks.

Tips for posting:

Download RDN Social Media Guidelines

- Be consistent
  - Tone of voice
  - Use interesting, colourful, or clever visuals (video, images or GIFS)
- Focus your messaging
- Determine which hashtags will help reinforce or share your message
- Measure and analyze results through analytics, comments and shares
- Share information that contextualizes or reinforces your messaging

Most departments have a person that has access to make social media posts for their department. If your department does not, the Engagement Coordinator can assist. All social media posting is to be done by scheduling on the social media calendar found on SharePoint.

> *Social media can be a powerful, efficient, and inexpensive way to engage and inform the community.*

11. Writing for the Web

Know who you are writing for before you start. What you're writing should be tailored to your intended audience.

Write the way you speak

- This is a common rule in web writing. The content that you create should be like a conversation between two people. Stuffy language can get in the way.
- One of the easiest ways to write as you talk is with contractions. People talk in contractions — like can't and don't, and using them helps people relate to what you're writing. The important thing to remember, though, is not to overuse them. Only use them when they sound natural.
- Remember to use the active voice. For example, instead of writing, "The bill should be paid by the property owner," we would write, "The property owner pays the bill." It's much simpler and more direct.
- An easy way to tell if you are using the active or passive voice is to add "by zombies" after the verb in the sentence. If the sentence still makes sense after adding "by zombies," it's in the passive voice. If not, it's in the active voice. (GRAMMARLY)

Be short and to the point

- If a headline is longer than 11 words, it's probably too long. Use full names and titles in headlines. Paragraphs should be two to three sentences at most. Aim for a sentence length of 15 to 20 words. For example, "Perhaps more important than firefighting itself in many modern industrial countries is fire prevention," could just be, "Fire prevention is important."
- Brevity can also increase readability and make the site more user-friendly for people using smartphones or tablets.

Write for smaller screens

- The more text, the more scrolling someone does on their smartphone or tablet.

Jargon and government legalese

- We should be writing to the person with the least amount of knowledge on the topic.
- Don't be afraid to say "we" instead of "The Regional District." Instead of "residents" or "applicants," consider saying "you."

Run-on sentences and multiple commas in a sentence

- Use periods where you can to help a reader digest the content.

Words like "may" and "shall"

- When something needs to be done make sure a resident knows by using strong words like "must."

Acronyms

- The website shouldn't require a glossary of terms or a legend for acronyms. Spell out what you're talking about in detail.

Symbols

- While symbols — like "&" and "@" — can shorten your text, it is better to spell out what you're writing. Symbols like these will only confuse your readers, especially those who may be learning English as a second language.

Repetition

- If the full title of person or place has been used already as a first reference on the page, we don't have to repeat that full title. "Mayor Jane Doe" would simply become "the Mayor" down the page.

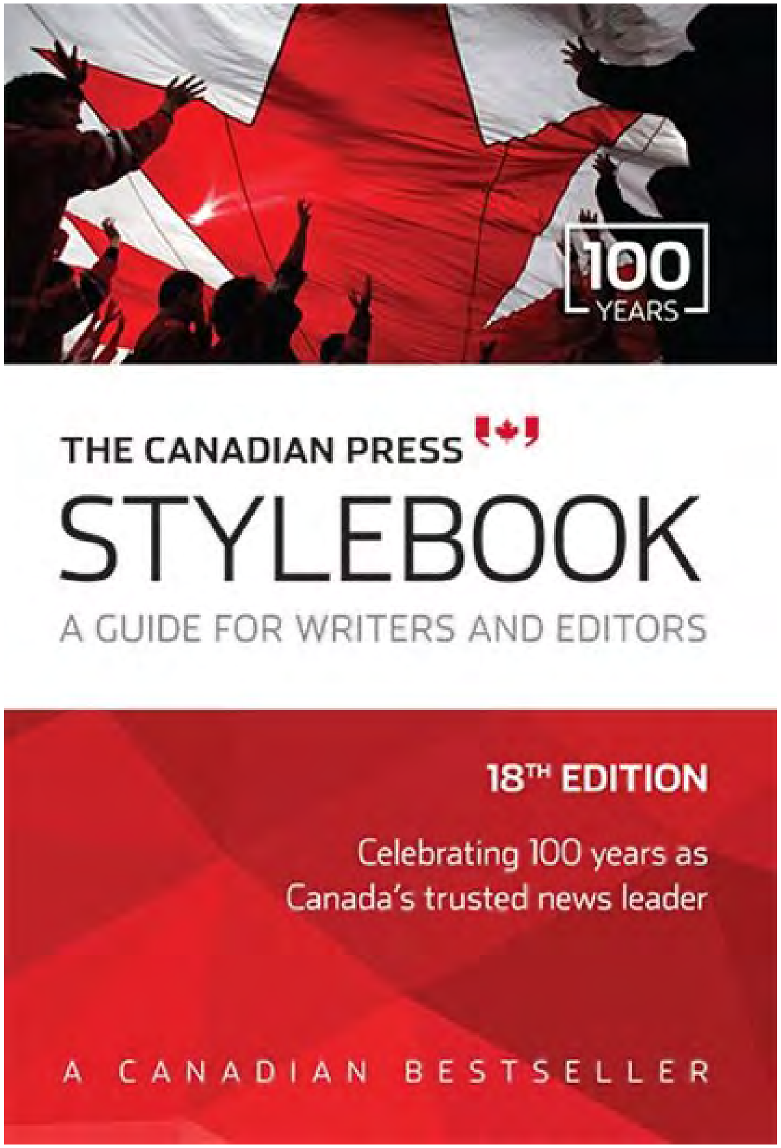
12. Writing Style Guide

We are committed to creating content that empowers, educates, and guides our residents. We can achieve this by making our messaging clear, relevant, interesting, and engaging.

Only experts can make what's difficult look easy, and it's our job to demystify topics and actually educate.

Canadian Press Style Guide

Media and communications materials, including news releases, follow the writing standards outlined in the Canadian Press (CP) Style Guide. The CP Style Guide is updated routinely by the Canadian Press and is followed by media and most public sector agencies to ensure consistent written style and formats.



Connect

13. First Nations Territorial Acknowledgement

Acknowledging the traditional territory or land in which we work is a way to pay respect to First Nations people who were here before the settlers. This practice encourages us to learn more about the people whose lands we live on, and to learn more about our history and relationships. It is also a reminder that we are all responsible for these relationships.

The acknowledgement is the recommended statement to be read at the commencement of RDN hosted events, ceremonies or gatherings, or when sharing formal greetings or remarks. We can also use this acknowledgement any time we come together as colleagues.

"I would like to respectfully recognize the Coast Salish Nations whose traditional territory we are on."

The spirit of the acknowledgment is to give thanks to the people of our traditional territories for hosting us and is an important step towards reconciliation.

When hosting a larger community event or official opening, it may be appropriate to request a local Elder do a welcome to the territory in accordance with protocol.

14. Event Checklist and Plan

Venue & Timing

- ☐ Choose a venue that will accommodate more than the number of people you expect
- ☐ Choose a venue that is accessible for those with mobility, visual or hearing needs and meets accessibility standards
- ☐ Choose a venue that is inclusive of diverse races, cultures, and gender identities
- ☐ Consider how the venue supports multiple transportation modes, vehicle and bike parking, and bus routes
- ☐ Visit the venue the same time of day as your event is planned to assess the natural light or additional lighting needs
- ☐ Consider the acoustics and temperature of room
- ☐ Confirm what other events are occurring during the time of your event
  - Will those events attract or detract people from attending?
  - Will those other events create conflict or excess noise?
  - Will there be enough parking for attendees with another event taking place?
- ☐ Confirm any audio-visual needs and whether the venue can accommodate them
- ☐ Confirm where the washrooms and emergency exits are located
- ☐ Confirm who will be on-site during your event and obtain their contact information
- ☐ Confirm what time you can access the venue to ensure ample time for setup and take down
- ☐ Confirm garbage, recycling, and compost equipment receptacles availability
- ☐ Confirm availability of table and chairs – including room setup

Notes on the Venue:

Promotion and Advertising

- ☐ Direct invitation to those most affected or interested by email, phone call or letter
- ☐ Social media
- ☐ Posters
- ☐ News release
- ☐ Print or online advertising
- ☐ Insertion in newsletters

Notes on Promotion:

Supplies

- [ ] Sign-in sheets with option to receive future updates
- [ ] Clearly marked container for feedback forms, surveys or comment cards
- [ ] Nametags for key attendees and staff
- [ ] Business cards
- [ ] Miscellaneous items: tape, zap straps, scissors, large envelopes, band-aids, paper clips, large clips, elastics, petty cash, etc.
- [ ] Attendee counter or "clicker"
- [ ] Ball point pens, pencils, permanent markers, colourful markers
- [ ] Door signage, sandwich boards or balloons to help attendees find the room
- [ ] Easels and flip-chart paper
- [ ] Feedback forms/comment cards
- [ ] Audi-visual equipment – laptop, projector, speakers, microphone, cords to connect laptop to projector, presentation remote, USB
- [ ] Visual aids – posters, maps, PowerPoints, background reports, etc.
- [ ] Notice of filming or photography if video or photos are being taken
- [ ] Photo release form if planning to publish an identifiable person's image
- [ ] Podium
- [ ] Refreshments (coffee/tea, cookies, muffins)
- [ ] Large format paper, sticky notes (various colours and sizes), sticky dots
- [ ] Table linens
- [ ] Tables and chairs
- [ ] Venue contact and key contact information
- [ ] Water for presenters
- [ ] Children's activities – Lego, books, colouring posters and crayons

Notes on Supplies:

Staff Roles at Events

- [ ] Ensure you have included enough staff to help set-up, facilitate and take down the event
- [ ] Establish clear roles and responsibilities for the event (set-up, reception, facilitation, assistants, technical experts, media spokesperson etc.)
- [ ] Meet prior to event start time to discuss what may occur at the event and ensure staff have a shared level of understanding about key elements of the issues and event – including what happens after the event
- [ ] Attendees should be greeted and thanked as they leave
- [ ] Take photos of comment boards, flipcharts, or interactive display boards to record visually and to quickly reference what was heard. These photos can also assist with data entry and reporting after the event
- [ ] Take photos of the event with identifiable faces hidden from plain view
- [ ] Determine who is taking the data (notes, flip charts, etc.) or input from the event and what is being done with it
- [ ] Track how many people stop to talk and/or take material; note what questions are commonly asked (this data will be included in the “What We Heard” summary)
- [ ] Ensure attendees are aware of next steps and where they can go for more information after the event
- [ ] Debrief at the end of the event to share staff perspectives about what was heard, what was surprising, what worked well, what should be done differently in the future

Notes on Staff Roles:

15. Facilitation Tips & Checklist

Meetings or events where stakeholders are brought together to provide input or ask questions about an issue are generally more effective and efficient if they are facilitated, particularly if the issue is controversial. A facilitator manages the meeting, keeps conversations on track and ensures each participant's voice is heard. This tip sheet will provide some information on how to accomplish these tasks.

What is Facilitation? What is the Role of a Facilitator?

The definition of facilitate is "to make easier" or "to help bring about." The role of the facilitator is to help the participants work together by providing and managing the meeting process or structure, while the participants remain focused on the meeting content. The facilitator keeps the process on track and moving forward with all participants engaged, making best use of time and resources.

An effective facilitator quickly establishes and builds trust with the group through honesty and transparency in his/her communication. Facilitators must know what questions to ask, when to ask them, and how to structure questions to get good answers without defensiveness. Facilitators should know how to rephrase or reframe questions and comments, give positive reinforcement, encourage contrasting views, include quieter members of the group, and deal with domineering or hostile participants.

Facilitator's Checklist

Before the Meeting: Prepping your Facilitator or Yourself as the Facilitator

- [ ] Know who the meeting participants will be and which community groups will be represented
- [ ] Understand the purpose of the meeting and the desired outcome. What will a successful meeting look like?
- [ ] Together with the project manager, establish a structure for the meeting and confirm the agenda
- [ ] Select and design a process and agenda for the meeting that will help participants to engage effectively and provide the required feedback. Have a plan but be willing to be flexible in response to the situation.
- [ ] Set up the meeting space, and ensure that other logistical details have been taken care of
- [ ] Provide adequate notice of the meeting, its purpose and agenda to participants

Good Facilitators

- Value people and their ideas
- Think quickly and logically
- Are excellent communicators
- Are active listeners
- Avoid jargon or acronyms
- Speak clearly, at a moderate pace, and at an appropriate volume
- Guide the discussion, but don't lead it
- Raise questions to bring out different viewpoints
- Restate ideas when the person presenting them is not clear

During the Meeting: Facilitator Roles

At the beginning of the meeting, with the group:

- ☐ Review the purpose and the expected outcome of the meeting
- ☐ Review the ground rules/expectations
- ☐ Review the items for discussion and the timeline
- ☐ Be very clear about your role as a facilitator. During the meeting, maintain eye contact with participants. Try not to talk too little or too much. You are there to bring out the views and contributions of participants. Stimulate discussion in the group when needed, ask the right questions and provide context for the discussion
- ☐ Be sure that everyone is heard and able to participate fully. Know when to draw in those who may not be participating initially, and prevent others from dominating
- ☐ Summarize when necessary and build on the contributions of the participants
- ☐ Keep the discussion on topic. Be aware of when the group is off topic or confused and when structure may be needed; explain, summarize and help to paraphrase participants' input when necessary; decide when to extend a discussion and when to move the group onto the next topic; remind the group when they are off subject
- ☐ Prepare to work through conflicts between participants by creating trust within a "safe space"
- ☐ Stick to the pre-determined timeline
- ☐ At the end of the meeting, provide closure and reiterate action items/next steps
- ☐ Ensure that proper records/minutes are kept (e.g. record of discussion, decisions made, next steps, action items). Ensure accuracy

Ground Rules

Ground rules help meeting participants establish appropriate ways to interact with each other during the meeting and encourage positive group interaction. The rules do not have to be extensive.

Here are some examples:

- Listen to and show respect for the opinion of others
- Follow the agenda—stay on track
- The only stupid question, is the one that isn't asked
- No disruptive side-conversations
- Cell phones off

16. Helpful Event Forms & Templates

Please download and customize to your specific event.

Download Event Sign-In Form

Download Model Release Form

Download Model Release Form - Group

Download Notice of Filming & Photography

Evaluate

17. Participant Post-Event Feedback Form

1. Have participants fill out the form after the engagement event
2. Collect feedback forms
3. Analyze, report findings, and improve future events

Please download, customize, print and distribute the form to participants.

Download Participant Post Event Feedback Form

18. Staff Engagement Evaluation Form

MANDATORY COMPLETION OF FORM for all projects with engagement. Final evaluation shared with the Engagement Coordinator.

1. Debrief with project team and document lessons learned.
2. Send evaluation form to project team.
3. Identify potential alterations for the next event.

Item	What worked well?	What could be improved?
Did we achieve our objectives? ■ Why or why not?		
Diversity ■ Did we engage a wide range of voices? How?		
Inclusion ■ Were all relevant stakeholders identified and included?		
Accessibility ■ Did we ensure barriers to participation were removed? ■ How?		

Item	What worked well?	What could be improved?
Respect ■ Was the process respectful of participants' time and input? ■ How?		
Transparency ■ Were the levels of involvement and influence clearly communicated with participants? ■ Did we report back/commit to report back with results and updates to participants?		
Responsiveness ■ How did the public engagement team respond to participant questions?		
Other ■ Were there any questions or concerns expressed from participants? ■ General overall comments or feedback from participants?		

Event	What worked well?	What could be improved?
Venue ■ Location – easy to access (parking, transit, wheelchair accessible)? ■ Wayfinding – signage, easy to find room? ■ Room – good size, layout, furniture? ■ Registration desk (materials, welcome process)? ■ Refreshments (amount, type)? ■ AV equipment?		
Staffing ■ Appropriate number of staff? ■ Relevant knowledge? ■ Facilitation skills?		
Format & Activities ■ Agenda – good timing and flow? ■ Presentation – length, content? ■ Facilitation – clear instructions, keeping time, managing issues? ■ Activity – comments on the process? Lessons learned? ■ Input gathered – quality feedback and ideas documented?		
Relevancy ■ Were the materials and questions provided meaningful and relevant to participants?		

Download Staff Post-Event Evaluation Form

Close the Loop

Reporting Out on Public Engagement Efforts

The final step in the engagement process is ensuring that the community is aware of what input was collected and how it was used.

Often a "What We Heard" report will be produced that provides an overview of the process undertaken, who participated, what was asked, what was heard and the project's next steps. The "What We Heard" report demonstrates transparency and documents the efforts undertaken. Once complete, these reports should be available to elected officials, staff, participants and the broader public. Reflect on how you communicated with stakeholders throughout the process and use similar methods for closing the loop on the outcome.

For lengthy projects, or projects with multiple events or phases, there may be several reports produced after each phase or milestone. They can be important building blocks when time passes between phases or can be used as a reminder of what was heard in the past.

Some questions to consider when evaluating your public engagement activities are:

- [ ] Did you meet, exceed, or satisfy the goals you had set out at the outset of the planning process?
- [ ] Was the issue clearly defined before starting?
- [ ] Did the engagement adhere to the core values of public engagement set out in this toolkit?
- [ ] Did you include potential participants in the design of your engagement activity?
- [ ] Were the appropriate stakeholders identified?
- [ ] Did the identified stakeholders participate?
- [ ] Were the tools and techniques appropriate?
- [ ] Were a variety of techniques used?
- [ ] Were there any unforeseen circumstances or constraints?
- [ ] Were individuals and stakeholders given adequate opportunity to participate in all aspects of the process?
- [ ] Was the engagement inclusive? Did it meet the needs of those with disabilities or language barriers?
- [ ] Was the received input relevant and valuable?
- [ ] Were all critical issues addressed?
- [ ] Did you effectively record and analyze the input received?
- [ ] Was the engagement completed within the set budget and timeline?
- [ ] Were participants made aware of how the engagement and their feedback could/would be used?
- [ ] Did the input inform the decision?

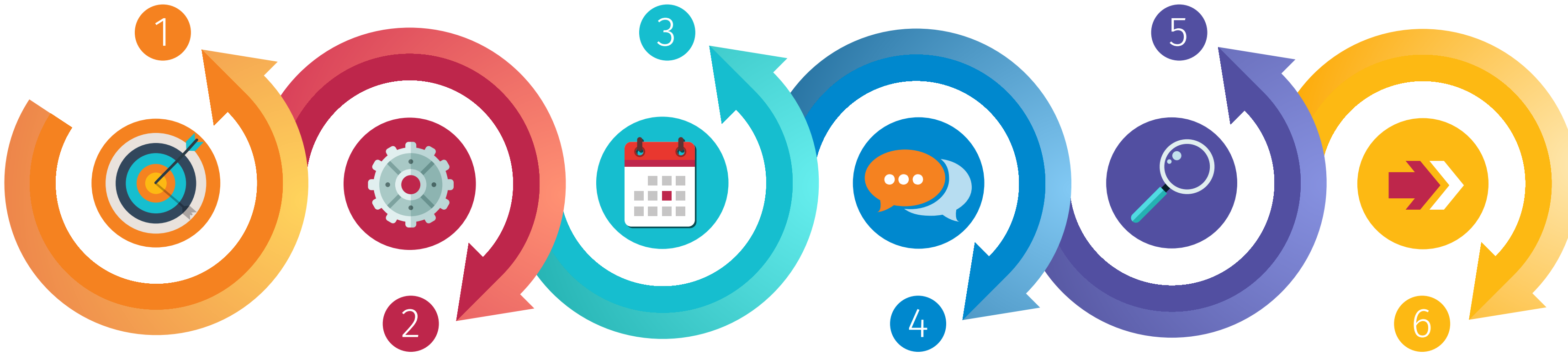
What went well?

- [ ] Were participants generally satisfied with the process?

19. Engagement Summary Report: Reporting on What We Heard

MANDATORY COMPLETION OF REPORT for all projects with engagement.
Draft shared with and final plan approved by the Engagement Coordinator.

The "What We Heard" report should include:



Project Overview/ Process & Objective for Engagement

- Key background
- Engagement objectives
- Strategic approach or principles applied

Steps to be Undertaken in Overall Process & Associated Timeline

- Engagement opportunities should be identified within the steps

Awareness & Engagement Activities Undertaken

- Describe how events and surveys were promoted – advertisements, social media, news release
- Outline number, dates, and locations of events and surveys
- Include photos of events and images of promotional tools used and/or media coverage

What We Heard

- Include photos of events and images of promotional tools used and/or media coverage
- Theme/Analyze open-ended comments. Review volume, privacy considerations and preferences of decision-makers
- Open-ended comments are included as an appendix for review

Note: Open-ended comments can often unintentionally identify an individual. **A detailed review of all comments must be completed.**

Who We Heard From

- Number of participants, relevant demographics (e.g. renter vs. owner, age, neighbourhood, previous participant, etc.)

Next Steps

- Outline the next steps in the process and how input will be used/was used to inform the decision
- Note upcoming meetings or decision points and associated timeline
- Include web address for where to find additional information

Download Engagement Summary Report Template

Helpful Links

Approved Policy Web Links

- RDN Public Engagement Policy
- RDN Communications Policy
- RDN Media Guidelines
- RDN Social Media Guidelines
- RDN Graphic Standards
- RDN Advertising Templates and Guide
- RDN Logos
- RDN Communications SharePoint

Attachment 5
Draft Consulting Services Agreement

REGIONAL DISTRICT OF NANAIMO

CONSULTING SERVICES AGREEMENT

THIS AGREEMENT made the _______ day of **<insert month>**, 20___.

BETWEEN:

REGIONAL DISTRICT OF NANAIMO
6300 Hammond Bay Road
Nanaimo, BC
V9T 6N2

(hereinafter called the "Regional District")

AND:

<Insert Company/Individual Name>
<Insert Street Address>

(hereinafter called the "Consultant")

NOW THIS AGREEMENT WITNESSETH:

THAT in consideration of the terms, conditions and covenants hereinafter set forth, the Regional District and the Consultant covenant and agree each with the other as follows:

1. Appointment

The Regional District retains the Consultant to provide the Services (herein called the "Services") described in Schedule 'A' which is attached hereto and forms part of this Agreement.

2. Term

The Consultant will provide the Services during the period (hereinafter called the "Term") commencing on <insert date> and ending on <insert date>, unless sooner terminated as hereinafter provided.

3. Payment

The Regional District will pay to the Consultant, for the Services, the amount, in the manner and at the times set out in Schedule 'B' attached hereto. The Consultant agrees to accept the amount as full payment and reimbursement. No additional amounts may be charged by the Consultant.

4. Independent Contractor

The Consultant will be an independent contractor and not the servant, employee or agent of the Regional District. The Consultant is not, and must not claim to be the Regional District's agent for any purpose unless the Regional District gives the Consultant authorization in writing to act as the Regional District's

agent for specific purposes that are reasonably necessary to the Consultant's rendering of the Services pursuant to this Agreement.

5. Assignment and Sub-contracting

Unless already approved by the Regional District, the Consultant will not, without the prior written consent of the Regional District, assign or subcontract this Agreement or any portion thereof.

6. Ownership of Documents and Confidentiality

6.1 Title. The title, property rights, moral rights and ownership in and to all present and future materials and information produced or prepared by the Consultant pursuant to this Agreement including but not limited to plans, drawings, specifications, computer discs, listings, computer software and any other material or physical item on which information is stored shall vest in the Regional District without any payment by the Regional District therefor.

6.2 Patent and Copyright. The title, property rights, moral rights and ownership in and to all copyright in all present and future literary or artistic works including, but not limited to, computer programs and software, plans, drawings and specifications and the title, property rights and ownership in and to all patent rights in any invention developed during the course of or out of providing the Services shall vest in the Regional District without any payment by the Regional District therefor.

6.3 Further Assurances. The Consultant shall upon request by the Regional District, do all such things and execute and deliver to the Regional District all such documents and instruments as the Regional District shall reasonably require in order to vest title, property rights and ownership in the Regional District and the Consultant shall execute and deliver all such assignments, documents and instruments as may, in the Regional District's opinion, be necessary or desirable for the application or the issuance of any patents, designs or the registration of any copyright.

7. Conflict

The Consultant shall not, during the term, perform a service for or provide advice to any person, firm or corporation where the performance of the service or the provision of the advice may or does, in the reasonable opinion of the Regional District, give rise to a conflict of interest between the obligations of the consultant to the Regional District under this Agreement, and the obligations of the Consultant to such other person, firm or corporation.

8. Indemnity

The Consultant shall release, indemnify and save harmless the Regional District, its elected officials, officers, and employees of and from all claims, costs, losses, damages, actions, causes of action, expenses and costs arising from any error, omission or negligent act of the Consultant, or its officers, employees, agents or consultants, in the performance of the Services, or from the Consultant's breach of this Agreement.

9. Insurance

Comprehensive General Liability in an amount not less than two million dollars ($2,000,000.00) inclusive per occurrence against bodily injury and property damage. The Regional District is to be added as an additional insured under this policy, is to be endorsed to provide the Regional District with 30 days advance written notice of cancellation or material change, and include a cross liability clause.

10. Termination

Notwithstanding any other provision of this Agreement:

a) If the Consultant fails to comply with any provision of this Agreement, then, and in addition to any other remedy or remedies available to the Regional District, the Regional District may, at its option, terminate this Agreement by giving written notice of termination to the Consultant.

b) Either Party may terminate this Agreement at any time upon giving the other Party seven (7) days notice of such termination.

If either such option is exercised by the Regional District, the Regional District will be under no further obligation to the Consultant except to pay the Consultant such amount as the Consultant may be entitled to receive, pursuant to Schedule 'B', for services provided and expenses incurred to the date the said notice is given or delivered to the Consultant. The Consultant will refund to the Regional District any payment already made to the Consultant not yet earned.

11. Prior Dealings

All prior negotiations and agreements between the parties relating to the subject matter of this Agreement are superseded by this Agreement. There are no representations, warranties, understandings or agreements other than those expressly set forth in the Agreement or subsequently agreed to in writing, which writing shall be executed by a duly authorized officer of the party to be bound thereby.

12. Waiver

The failure of either party at any time to require the other party's performance of any obligation under this Agreement shall not affect the right to require performance of that obligation in the future. Any waiver by either party of any such breach or any such provision hereof shall not be construed as a waiver or modification of this provision itself, or a waiver or modification of any other right under this Agreement.

13. Counterparts

This Agreement may be executed in counterparts with the same effect as if both parties had signed the same document. Each counterpart shall be deemed to be an original. All counterparts shall be construed together and shall constitute one and the same Agreement.

14. Dispute Resolution

If the parties to this Agreement are unable to agree on the interpretation or application of any provision in the Agreement, or are unable to resolve any other issue relating to this Agreement, the parties agree to the following process in the order it is set out:

a) the party initiating the process will send written notice to the other party (the "Dispute Notice"); and;

b) the parties will promptly, diligently and in good faith, including the senior management of both parties, take all reasonable measures to negotiate an acceptable resolution to the disagreement or dispute.

c) if the dispute is not resolved through collaborative negotiation within 30 Business Days of the dispute arising, the parties must then attempt to resolve the dispute through mediation under the rules of the Mediate BC Society and will be held in Nanaimo, BC.

15. Freedom of Information

The Consultant acknowledges and agrees that any Confidential Information disclosed by it to the RDN under this Agreement may be subject to a request for public disclosure under the Freedom of Information and Protection of Privacy Act, R.S.B.C. 1996, c.165, as amended from time to time.

16. Collection of Personal Information

Unless the Agreement otherwise specifies or the Regional District otherwise directs in writing, the Consultant may only collect or create Personal Information that is necessary for the performance of the Consultant's obligations, or the exercise of the Consultant's rights, under the Agreement.

Unless the Agreement otherwise specifies or the Regional District otherwise directs in writing, the Contractor must collect personal information directly from the individual the information is about.

Unless the Agreement otherwise specifies or the Regional District otherwise directs in writing, the Contractor must tell an individual from whom the Contractor collects personal information:

a) the purpose for collecting it;

b) the legal authority for collecting it; and

c) the title, business address and business telephone number of the person designated by the Regional District to answer questions about the Contractor's collection of personal information.

17. Governing Law

This Agreement is governed by, and is to be interpreted and construed in accordance with, the laws applicable in British Columbia.

18. Miscellaneous

All provisions of this Agreement in favour of the Regional District and all rights and remedies of the Regional District, either at law or equity, will survive the expiration or sooner termination of this Agreement.

IN WITNESS WHEREOF the parties hereto have executed this Agreement the day and year first above written.

For the Regional District of Nanaimo:

)
)
)

Printed Name of Signatory

)
)
)

< insert position title>

For the Consultant:

)
)
)

Printed Name of Signatory

)
)
)

< insert position title>

SCHEDULE 'A'
SCOPE OF WORK

<insert scope of work, deliverables and timeline>

SCHEDULE 'B'
FEES & EXPENSES

Total compensation to be paid to the Consultant by the Regional District of Nanaimo shall not exceed a maximum of **$<insert upset amount>**. This compensation includes all fees and expenses including GST. If the services are completed by the consultant at less cost than **$<insert upset amount>** the Regional District shall be billed only for actual hours worked and actual expenses incurred. If the Consultant receives the Maximum Fee, but has yet to complete the Services, it shall continue to provide the Services until it has provided all of the Services.

Payment by the Regional District to the Consultant will be upon receipt of monthly written invoices from the Consultant for completed services and will be paid on a net 30 day basis from date of receipt. (Invoices shall contain a written statement of account showing the calculation of all fees and expenses claimed.)