



NAMING, RENAMING & COMMEMORATION PROCESS DESIGN

CITY OF CALGARY

CIVIC INNOVATION FUND

PROJECT PROPOSAL

SUBMITTED BY: MR JOSH TRAPTOW, EXECUTIVE DIRECTOR - HERITAGE CALGARY
DATE: FEBRUARY 16TH, 2021





LETTER OF INTRODUCTION

Heritage Calgary is very pleased to submit this application to the Council Innovation Fund to support Naming, Renaming & Commemoration Process Design.

In meeting with Councillor Colley-Urquhart this fall she thought it was important for the process of naming and re-naming to be community based and community focused.

From Councillor Farrell's notice of motion this summer, we know that naming and commemoration is a very timely and important topic.

Heritage Calgary is well suited to undertake this process design work based on our mandate to advise City Council and the City on heritage-related matters. We have been established since 2000 and have provided advice to Council on a variety of items and topics. Since 2015, with the support of the City, we have come a long way. We were made an official Civic Partner in 2019 and now have a professional staff of 3.5 employees. We continue to support the City on several key priorities, including the Calgary Heritage Strategy.

This work on renaming and commemoration is not new to us. In late 2017 we worked closely with Council and the Calgary Aboriginal Urban Affairs Committee (CAUAC) on the

renaming of the Reconciliation Bridge and the subsequent interpretation panel that was produced in 2019. The panel included information about the importance of the site as a crossing, who Hector-Louis Langevin was, the impact of the Residential School System and why the name Reconciliation Bridge was chosen.



We are excited to undertake this work and bring Calgarians together to progress through this important project.

Best regards,
Josh Traptow, Executive Director
Heritage Calgary





TABLE OF CONTENTS

1	Project Introduction & Rationale	PAGE 2
2	Why Heritage Calgary?	PAGE 6
3	Project Scope	PAGE 7
4	Project Partners	PAGE 10
5	Project Budget & Timeline	PAGE 11

APPENDICES

A	PARTNER PROFILES
B	HATLIE GROUP PROPOSAL
C	RISK MITIGATION TABLE



PROJECT INTRODUCTION & RATIONALE

History of (re)Naming in Calgary

The act of bestowing a name upon something is intimate, almost sacred. Calgary – this city, as we know it – has been known by many names over the course of its existence. This place is also known as Moh-kins-tsis, a Blackfoot word for ‘elbow’, in reference to the place where the Bow and Elbow rivers meet. This place is also known as Wîchîspa Oyade (Stoney), Otos-kwunee (Métis), Kootsisáw and Guts-ists-i (T’suu T’ina). It is a place where the sharing of ideas and opportunities naturally come together.

In the 1800s settlers moved west and established settlements on native land, including a fort located at that same meeting place of the two rivers. Rumour has it Calgarians were very close to being known as ‘Briseboisites’ after a boisterous young officer named Ephrem A. Brisebois issued an order declaring the name of the fort to be ‘Fort Brisbois’; however, that order was quickly countermanded, and the name Fort Calgary was recommended as a replacement.

Calgary has been named and renamed many times by many different people and parties, each with their own intentions, values, and visions. Today we are faced with big questions around the act of naming – and, consequently, renaming.

The questions are difficult and inevitable, and all circle around an age-old quandary – what’s in a name? If the names of the places we cherish, frequent, and gather are not reflective of the fascinatingly diverse society Calgary is today, should those places be renamed to better reflect that diverse landscape? When should we consider renaming something – when the name is exclusive or divisive? When it is harmful? What do we do when someone we have lionized is proven to be racist (and further, what is racist? Who decides? Does racism transcend time – that is, do we judge a person’s actions outside of the different time period they operated within?) What is the threshold for renaming – should there be one? Or is there a renaming “trigger”? In considering a new name for the places we value, how do we ensure that new name does not repeat the mistakes of the past, and is inclusive?

Why Now?

Recently, the major question of renaming and commemoration in Calgary has been around the call to rename James Short Park. The park is named for James Short, a prominent lawyer who moved to Calgary from Ontario in the late 1800s. Short petitioned city commissioners to prohibit Chinese Canadians from establishing Chinatown in its current location south of the Centre Street bridge – its third location within the city after being evicted from two previous locations, once due to fire, and once due to gentrification of properties along the CPR rail line. The petition claimed that Chinese Canadians would lower property values and the further contended that “it is for [the City commissioners] to take up the question and set the Chinese in one section of the city as you would an isolated hospital”. Other local instances have occurred over the last several months including a petition to change the name of William Aberhart High School due to Aberhart’s involvement in crafting policy that harmed minority groups like the LGBTQ2AI+ and guided legislation to deport Chinese and Japanese minorities following World War II.



The city block that now hosts James Short Square was once home to Central Public School, an elaborate sandstone structure similar to Haultain or King George. The school was renamed in honour of former principal, lawyer, Crown prosecutor, and school board trustee James Short in 1938. The school was demolished in 1973 - the domed cupola is the only remnant of the structure that remains. In 1973, a new school named James Short Memorial School was constructed in the SE community of Penbrooke Meadows.



“Marriage, homemaking, and the rearing of children are left entirely to chance, and so it is no wonder that humanity produces so many specimens who, if they were silk stockings or boots, would be marked “seconds”.”

Within the heritage and history industry – and Heritage Calgary – we are being faced with big, complex questions around naming, renaming, and commemoration. The older we get, the more history we uncover. Individuals who were once held up as paragons of society and indelible pioneers in the building of this place are discovered to have had values or taken actions that, today, we at best question, at worst find abhorrent. Some of these individuals’ legacies are secured and reflected today on schools, on parks, on civic buildings. Some of these individuals’ legacies are constant reminders for some that they were not accepted, unwanted, rejected, hated, put at risk, or withheld rights that others enjoyed.

Commemoration is a part of this complex conundrum. An example of this is in dealing with the legacy of Nellie McClung. This feminist pioneer continues to be lauded for her commitment to the women’s suffrage movement and has long been commended as a champion of women’s rights. However: McClung – a large reason why some women gained the right to vote in Alberta in 1916 – was also a supporter of the social philosophy of eugenics and campaigned for the

sterilization of those considered “simple-minded”. Her promotion of the benefits of sterilization contributed to the passage of eugenics legislation in Alberta. While McClung’s admirable advancements for women’s equality is remembered in statue form just outside Arts Commons on a well-trodden section of Stephen Avenue, this commemoration does not tell the full story of her complicated history.

We are not the only city grappling with this complicated question. In Edmonton, the issues that place names have created has kickstarted an intense discussion around renaming. So far, Edmonton has installed an Indigenous naming committee of 17 women to create Indigenous place names for each ward that directly suit the area of Edmonton which they represent. Elsewhere, the Edmonton Public School Board has voted to rename Dan Knott and Oliver Schools, two educational institutions with racist namesakes. More broadly, a petition to rename the entire community of Oliver is ongoing after a local campaign revealed the racist and discriminatory history of their neighbourhood’s namesake.



Dan Knott, an Edmonton mayor who served in office between 1931-33, was affiliated with and supported the Ku Klux Klan during his time in office. Alberta Klan imperial wizard J.J. Maloney actively campaigned for Knott and when he won the 1931 election, Maloney burned a cross on Connors Hill in celebration.



The Famous Five bronze monuments “Women are Persons!” in both Ottawa and Calgary commemorate a major advancement of women’s rights in Canada. All five women from Alberta also strongly supported the eugenics movement, a pseudoscience that subscribed to the idea that the human population could be improved by controlling reproduction.

Perhaps the most important instance of renaming in Calgary is that of Reconciliation Bridge (once Langevin Bridge). Many are now aware that the bridge was originally named after Sir Hector-Louis Langevin, one of the Fathers of the Canadian Confederation. Langevin is also known for his part in assimilating Native students in the Indian Residential school system in Canada.

The renaming process for Reconciliation Bridge came out of a recommendation set forth in the White Goose Flying Report to Calgary City Council on the Indian Residential School Truth and Reconciliation. This paper made it startlingly clear that the names some find inspirational others find harmful. The report stated that, “[f]or The City of Calgary to consider re-naming the bridge to a name that signifies building communities rather than dismantling them is a powerful symbol of mutual respect for the future”. It is this work – creating successful, inclusive, and diverse instances of tangible actions that demonstrate an aggrieved and injured party has been heard and extending respect and proof of evolution to that party – that this proposal seeks to begin.

It is important to recognize that this is an issue with a long, exhausting past. The instances of renaming in Calgary – and, beyond that, this proposal – is not reactionary or reactive to the social movements that we saw take over our



streets and our screens in 2020. The formation of movements like Black Lives Matter and Idle No More are simply instances of the pot boiling over after decades of simmering tensions that, in part, are fueled by things like insensitive historic naming practices that have elevated some individuals whose actions were hurtful, harmful, or discriminatory.

The issue of naming and renaming is once again a “hot button topic”. Reactions to the concept of renaming are instantaneous and sometimes visceral, based on feeling and emotion rather than a logical and thought out process, on both sides. Without a clear process to follow, we risk repeating the past –affixing names or creating methods of commemoration that may exclude individuals, or even create hurt or harm. We also risk carrying on with a disparate, partial, and fractured naming, renaming, and commemorative processes.

We recognize that casting a modern light on the historic actions of individuals and passing judgement on those actions from the luxurious position of the present is exceptionally complicated and difficult to do. However, the more we dig, the more we unearth, and more and more

we will be faced with the question of how to handle a complicated history. It is evident that this is an issue that is not going away and will only demand more of our attention as we move into 2021, and we believe that now is the time to tackle the issue head on.

Taking on the challenge of designing a process for the practice of making decisions around naming, renaming and commemoration unique to Calgary is not undertaken lightly. The process will be messy, nonlinear, complicated, and intense – but these are not reasons to not do this work. This is difficult, necessary, urgent work. However, we do not undertake this design process blindly – amongst other instances across Canada and around the world, our neighbours to the north have accepted this challenge with open arms, and are a model municipality to look to at the onset of our own unique journey.

Ultimately, we believe we owe it to Calgarians to present them with whole stories, and allow their input into the renaming process if it is decided that process is to be implemented. We are excited to begin this journey and leave Calgary a little bit better than we found it.



WHY HERITAGE CALGARY?

Heritage Calgary is well-suited to undertake this work as an arm's length Civic Partner with a mandate to advise Council on all matters relating to Calgary's heritage resources and promote public awareness of our shared heritage. This work is ongoing in our industry and as heritage experts we have our fingers on the pulse of current events, recognize and are early adopters of best practices, and have connections within the industry to help facilitate a process as difficult as this one.

Internally, Heritage Calgary is undergoing a process of determining how coming to grips with the issue of naming as well. We are re-evaluating our naming process for new historic resources, how to assign a new name to a resource that has been re-evaluated and whose original name is no longer appropriate or valid, and how commemoration of history is done in our city. We are beginning the process of determining how best to recognize and share with others the darker parts of our history, working towards providing a platform to elevate lesser known but equally important stories of those who have made Calgary what it is today.

We have brought together a team of cultural consultants to create an inclusive, grassroots design process whose expertise will ensure the navigation of this complex project is as smooth as possible. Together we create a dynamic and creative team excited for the challenge this project presents.





HERITAGE CALGARY

Heritage Calgary is a charitable Civic Partner of the City of Calgary focused on the research, education, and preservation of our shared heritage in Calgary. We believe heritage is a dynamic process by which identity is experienced, interpreted, and represented and we take pride in working with Calgarians to honour the fabric that we are all a part of.



OUR VISION:

To be the voice of heritage for Calgarians.

OUR MISSION:

To identify, preserve, and promote Calgary's diverse heritage for future generations.

OUR MANDATE:

- 1 Advise Council on all matters relating to Calgary's heritage resources.
- 2 Evaluate potential historic sites.
- 3 Maintain Calgary's Inventory of Evaluated Historic Resources.
- 4 Promote public awareness of our shared heritage.



PROJECT SCOPE


The intention of this project is to build a strong foundational body of work and establish important relationships based on trust. Successful execution of this scope of work will see the completion of groundwork required to achieve the ultimate goal of creating unique, tailored plans that will guide the naming, renaming, and commemoration process in a Calgary-specific context. The project approach is systems-based, looking at the structures, policies, people, and relationships that support the work, and is designed to be iterative and responsive which will allow the project team to monitor, assess and adjust the process when it is clear that the community and stakeholders require it.

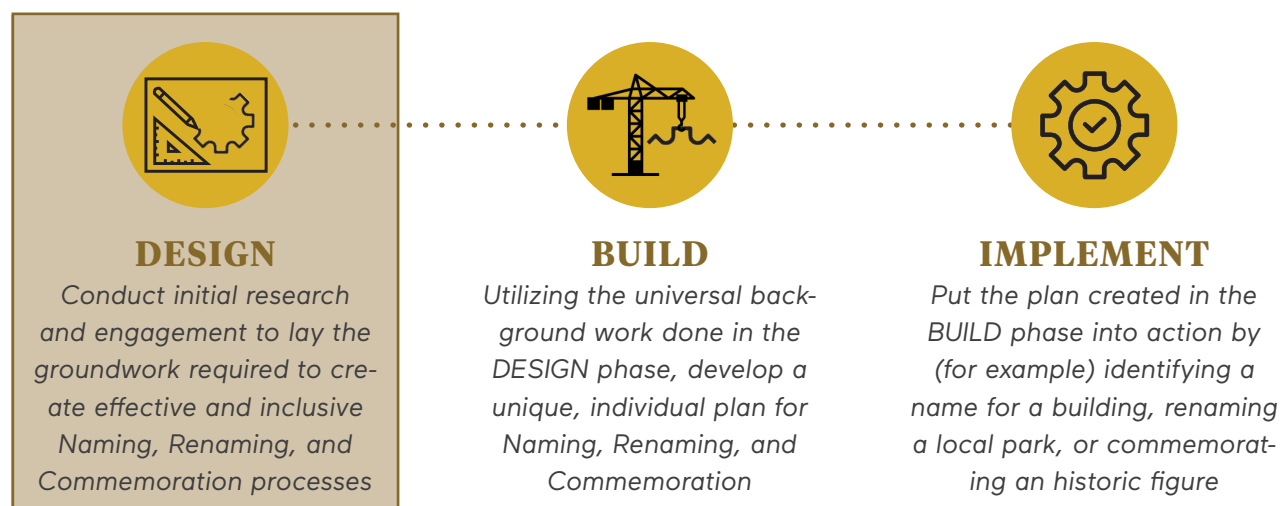
Through the project plan established in this proposal, we will undertake intensive in-depth research and review of established literature and best practices internationally and here at home. We will further begin to build relationships with a broad and diverse group of community stakeholders by identifying and mapping key stakeholder groups and through the subsequent development of a robust communications strategy. We will do this through the engagement of project champions, or representatives who can help the project team make connections with previously unengaged or isolated communities.

Finally, we will deliver a research report that analyzes and details the outcomes of the project findings that can be utilized by a broad diversity of Calgary-based individuals, non-profits, businesses, corporations, organizations, industries, etc., to create and implement their own unique naming, renaming, & commemoration plans. The scope of this project is not to produce one single Naming, Renaming, & Commemoration process or plan. We believe that this would produce a generic, unspecific plan that is too broad and high level to be useful to the unique groups of different sizes and structures that will be interested in utilizing it to implement a naming, name-changing, or commemoration plan unique to their own needs.

The project team envisions this to be phase one of a three phase project. These future phases are envisioned to be conducted by Calgary-based individuals and groups either with the help and support of this project team or on their own with their own team makeup. The scope of work to be executed in this phase is essential to guaranteeing success of individually-led future project phases; this phase - led by community stakeholders, guided by experts, and managed by a civic partner - will lay the foundation for collective ongoing future success.

ENVISIONED PROJECT PHASES

 *Scope of work proposed for this project



This phase of the project will include:



Preparatory work including literature review, review of best practices, and an internal & external scan of who in Calgary (within and outside the City) is undertaking this work



The development of a robust communications strategy and stakeholder mapping process



In-depth relationship-building engagement with a broad and diverse group of community stakeholders



Compilation and analysis of findings



Delivery of final report including consolidation of research, engagement efforts, and other fundamental background work required to guide future work around naming, renaming and commemoration by Calgary-based groups that can be utilized regardless of their size and scale (Community Associations, City departments and/or project teams, non-profits, museums and historic institutions, etc)

This phase of the project will NOT include:



A universal, generic naming, renaming, and commemoration plan for any particular group (including the City of Calgary)



Any obligation or requirement for future project phases to be funded by the Civic Innovation Fund OR the City of Calgary



The renaming or recommendation of renaming any sites, buildings, or landscapes in Calgary



The requirement of the City to implement the naming, renaming, and commemoration process



Drafting of formal policy or bylaw to be adopted by the City

A full scope of work is included in Appendix B – Hatlie Group Proposal.

A detailed list of risks and how the project team plans on mitigating them is included in Appendix C – Risk Mitigation Table.



A full and detailed breakdown of team members and resumes are included in Appendix A – Partner Profiles.

PROJECT PARTNERS



We are a charitable Civic Partner of The City of Calgary focused on the research, education, and preservation of our shared heritage in Calgary. We believe heritage is a dynamic process by which identity is experienced, interpreted, and represented and take pride in working with Calgarians to honour the fabric that we are all a part of. Our heritage is a richly woven fabric of the sites, structures, landscapes, and stories of all people who call Calgary home.

We believe our heritage resources connect us to our rich history and improves our quality of life. Our heritage creates a sense of belonging to a place with deep community roots. We work for the good of all Calgarians: past, present, and future.

PROJECT ROLE: Heritage Calgary will act as the project sponsor and be responsible for co-ordination of project partners, facilitation of budget distribution, and ensuring the project is delivered on time and on budget. Heritage Calgary will act as the primary liaison between the project team and the City of Calgary Council & Administration and provide ongoing project facilitation support.

Hatlie Group is a Calgary and Edmonton-based firm that aids non-profit organizations in transitioning management and governance practice to support operating strong, healthy, sustainable organizations. Hatlie Group was founded in March 2019 as a partnership between Alexandra Hatcher Consulting Inc. and Purple Aspen Inc.,

owned and operated by Crystal Willie. Crystal and Alexandra lead a team of associates and colleagues with specific expertise to carry out the work required to ensure an organization's success.



Hatlie Group's extensive experience and professional network is matched by a deep understanding of non-profit operations, governance, and current trends and best practices to support success in cultural organizations of all size and scope. Hatlie Group works with clients throughout the cultural and non-profit sector including museums, heritage organizations, archives, arts organizations, post-secondary programs, public sector, and community groups doing heritage or culture projects.

PROJECT ROLE: Hatlie Group is the primary project partner. They will be responsible for conducting extensive background research (including work scan, literature & best practices review), creating a robust communications strategy and establishing a list of project stakeholders (in collaboration with Intelligent Futures), facilitating extensive community engagement sessions, and producing the final research report and recommendations.

Intelligent Futures is a Calgary-based firm of progressive and versatile municipal problem-solvers. The firm works at the intersection of design, engagement, strategy, and sustainability to deliver memorable experiences and impactful results to our clients and the communities in which they work. Since its founding in 2008, Intelligent Futures has worked with

clients to deliver a diversity of projects ranging from MDPs and land use applications to social development strategies and environmental master plans. No matter the context of its work, Intelligent Futures remains true to the firm's core purpose of helping communities find better ways of living and thriving together.



intelligent
futures

Through its extensive experience delivering on the high expectations of public and private sector clients alike, Intelligent Futures continues to strive towards new standards of process, communication, and design-driven excellence in every discipline it touches. For this, the firm's team members have been recognized by institutes and organizations, including the Canadian Institute of Planners, the Alberta Urban Municipalities Association, and the International Association for Public Participation.

PROJECT ROLE: Intelligent Futures is the project supporting partner. They will be responsible for creating and implementing a robust strategic communications strategy, and provide ongoing project support in stakeholder mapping, facilitating community engagement sessions, and creating the final research report and recommendations.

PROJECT BUDGET & TIMELINE

Each project partner is committed to delivering the work outlined in this proposal for the fixed fees outlined below. Heritage Calgary's portion of budget distribution is inclusive of the contingency budget, which will be administered by Heritage Calgary on an as-needed basis, with rationale of use to be detailed in final project fiscal reporting.

PROJECT BUDGET SUMMARY

PROJECT PARTNER	PROJECT ROLE	BUDGET DISTRIBUTION
Heritage Calgary	PROJECT SPONSOR - City liaison - budget management - support stakeholder mapping - support engagement facilitation - support report development	\$20,400 (<i>including project contingency budget</i>)
Hatlie Group	PROJECT LEAD - research - work scan - literature review - support strategic communications strategy - stakeholder mapping - engagement facilitation - engagement results analysis - report development	\$95,000
Intelligent Futures	PROJECT SUPPORT - strategic communications strategy development - support stakeholder mapping - support engagement facilitation - support report development	\$32,500
PROJECT DISBURSEMENTS (<i>inclusive of printing & distribution of materials, honorariums, protocol & reciprocity fees, travel costs</i>)		\$7,000
PROJECT GST (5%)		\$7,100
TOTAL PROJECT BUDGET (<i>all inclusive</i>)		\$162,000

PROJECT TIMELINE SUMMARY

	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
<i>Project Kickoff & Coordination</i>										
<i>Stakeholder Mapping</i>										
<i>Communications Strategy</i>										
<i>Scan & Literature Review</i>										
<i>Community / Stakeholder Consultation</i>										
<i>Deliver Research Report</i>										



Project timeline



Project CONTINGENCY time
(as required)

An extension of time for community/stakeholder consultation may be warranted and will be arranged for by the project team (until and no later than September 2021). Planning for this time spillage is a mitigation of the risk of scope creep, an under-estimation of project timeline, and stakeholder actions which may delay the project. This project is intended to be entirely completed by December 2021.





APPENDIX A

PROJECT TEAM RESOURCES



HERITAGE CALGARY

Heritage Calgary is a charitable Civic Partner of the City of Calgary focused on the research, education, and preservation of our shared heritage in Calgary. We believe heritage is a dynamic process by which identity is experienced, interpreted, and represented and we take pride in working with Calgarians to honour the fabric that we are all a part of.



OUR VISION:

To be the voice of heritage for Calgarians.

OUR MISSION:

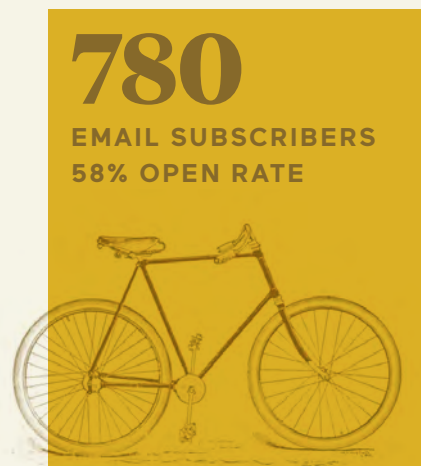
To identify, preserve, and promote Calgary's diverse heritage for future generations.

OUR MANDATE:

- 1 Advise Council on all matters relating to Calgary's heritage resources.
- 2 Evaluate potential historic sites.
- 3 Maintain Calgary's Inventory of Evaluated Historic Resources.
- 4 Promote public awareness of our shared heritage.



2019 Overview



Hatlie Group, led by Crystal Willie and Alexandra Hatcher, brings together a team of Associates and colleagues with specific expertise to carry out the work required to support your organization's success.

We have extensive experience in facilitation, strategic planning and stakeholder engagement, specifically in the heritage sector. Our experience is matched by a deep understanding of the power and promise of story and history in building community, and current trends and best practices to support success in organizations of varying size and scope.

Clients include museums, heritage organizations, archives, arts organizations, post-secondary programs, public sector agencies and institutions, and community groups doing heritage or culture projects.



CONTACT INFO:



INFO@HATLIEGROUP.CA



HATLIEGROUP.CA



[@HATLIEGROUP](https://twitter.com/HATLIEGROUP)

HATLIE
GROUP ★

RECENT CLIENTS

- Alberta Aviation Museum
- Alberta Museums Association
- Archives Society of Alberta
- Arts Commons
- Calgary Stampede
- Edmonton Heritage Council
- Fort Calgary
- Heritage Acres Farm Museum
- Jasper Yellowhead Historical Society
- Millet & District Museum and Archives
- Tumbler Ridge Museum Foundation



ENGAGEMENT AND CONSULTATION SERVICES

Hatlie Group's engagement practice is based in facilitating positive and constructive conversations, building to consensus. Providing a variety of opportunities for those impacted by decisions and those who influence decisions to participate in the conversation, supports an inclusive and considerate approach to consultation.

From individual interviews, to small group sessions, to large community conversations, Hatlie Group works to identify a series of building blocks, creating a solid foundation from which to foster success.



EXPERIENCE

Our methodology is informed by deep understanding of museum and heritage practice. Hatlie Group experience includes:

- Heritage Consultants - *Connections and Exchanges: A 10-Year Plan to Transform Arts and Heritage in Edmonton*
- Editor, *Standard Practices Handbook for Museums*, 3rd Edition
- Facilitator, Moh'kinsstis Public Art Guiding Circle (City of Calgary Public Art Program) and the Benefit-Driven Procurement, Public Art, and Indigenous Peoples Project
- Board Member, Friends of Geographic Names of Alberta Society
- Facilitator, Project Charter - Planet Youth Initiative, United Way Calgary



OUR TEAM

At Hatlie Group, we aid non-profit organizations in transitioning management and governance practice to support operating strong, healthy, sustainable organizations. Hatlie Group was founded in March 2019 as a partnership between Alexandra Hatcher Consulting Inc. and Purple Aspen Inc., owned and operated by Crystal Willie. Crystal and Alexandra lead a team of Associates and colleagues with specific expertise to carry out the work required to ensure an organization's success. Based in Calgary and Edmonton, Hatlie Group works with clients in Alberta and across Canada.

Our team would work collaboratively with your project team and staff. [Additional Hatlie Group Associates](#) and administrative and project support will be drawn on to meet project timelines and goals as required.

ALEXANDRA HATCHER CLIENT LIAISON AND FACILITATION LEAD



- Bachelor of Arts (Distinction) Art History, University of Winnipeg, 1996
- Certificate (Distinction), Arts and Cultural Management, MacEwan University, 1999
- Master of Public Administration, Museum and Gallery Management, University of Victoria, 2010

As an employee, board member, facilitator, contractor, and volunteer, Alexandra Hatcher has worked with, and for, non-profit and public sector cultural organizations for over twenty-five years. As a consultant, Alexandra supports organizations by facilitating change and building capacity in the arts and heritage sector. In March 2019, Alexandra partnered with Crystal Willie of Purple Aspen Inc. to form Hatlie Group.

Previously in her career, as the Director, Musée Héritage Museum, Alexandra was responsible for all areas of museum practice and administration, including research, programming, curatorial, and collections management. Alexandra was an integral member of the team that worked to transfer the museum and heritage sites from a municipal department to a nonprofit entity, amalgamating with the local art gallery to form the Arts and Heritage Foundation of St. Albert.

Alexandra was the Executive Director / CEO of the Alberta Museums Association (AMA) from 2009 to 2014. Under her leadership, the AMA launched a number of initiatives including the Sustainability Working Group, Robert R. Janes Award for Social Responsibility, and the Community Engagement Initiative. And from 2014 to 2017, Alexandra was Director of Site Operations for Alberta Culture and Tourism's Historic Sites and Museums, overseeing fourteen museums, interpretive centres, and historic sites located around the province, including Head-Smashed-In Buffalo Jump UNESCO World Heritage Site.

In spring 2017, Alexandra established her consulting and project management practice. Recent clients include United Way Calgary where she supported the initial stages of a community wide initiative to support resilient children and families; Arts Commons, where she worked with the staff, and leadership team, to support organizational change management; and the City of Calgary's Public Art Program, where she has held the role of Facilitator for the Moh'kinsstis Public Art Guiding Circle since July 2017.

CRYSTAL WILLIE PROCESS DESIGN LEAD



- Bachelor of Arts (Distinction), Concordia University College of Alberta, 2000
- Master of Arts, History, University of Alberta, 2004
- Professional Specialization Certificate in Cultural Heritage Sector Leadership, University of Victoria, 2012

Crystal Willie provides consulting services to cultural sector organizations and not-for-profits, primarily in the areas of project management, policy development, program review, and planning. In March 2019, Crystal partnered with Alexandra Hatcher of Alexandra Hatcher Consulting Inc. to form Hatlie Group.

Crystal has worked with community organizations from small arts cooperatives to provincial and municipal government agencies and departments. Clients include the Edmonton Arts and Heritage Councils, Calgary Stampede, Alberta Aviation Museum, Jasper Yellowhead Museum & Archives, Millet & District Museum, Archives Society of Alberta, Alberta Foundation for the Arts, City of Lethbridge, and the National Music Centre.

Since starting Purple Aspen in 2013, Crystal has worked independently or led collaborations to deliver projects including organizational transition and revisioning, needs assessments, cultural planning, interpretive planning and visitor experience assessments, a grants program review, emergency and disaster planning, and governance and operational policy development. Crystal led the heritage team in a consultant collaboration to develop the City of Edmonton's Arts & Heritage Plan, *Connections & Exchanges*, and a communications strategy for the Archives Society of Alberta that included membership demographic, program use and needs assessment research. Crystal worked with the Alberta Aviation Museum in 2019 to undergo a comprehensive business planning exercise that considered all aspects of governance, management and museum operations.

At the Alberta Museums Association, where Crystal worked for 12 years, she was responsible for the organization's operations and human resources portfolio, including supervising staff and contractors and managing a dynamic team structure to

maximize the capacity of the organization. She led organizational performance assessment programs such as the Recognized Museum Program and the Museum Excellence Program, employing outcome-based evaluation techniques to all areas of museum practice. She is the editor and project manager of the *Standard Practices Handbook for Museums*, 3rd Edition (2014) and *HELP! An Emergency Preparedness Manual for Museums*, 2nd Edition (2018). Both publications are used as textbooks in museum studies programs and sell internationally.

Crystal was a member of the Steering Committee to establish the Edmonton Heritage Council and served on the board for five years, including as its chair. She has a Master of Arts from the University of Alberta, a Professional Specialization Certificate in Cultural Heritage Sector Leadership from the University of Victoria, and over twenty years of experience working and volunteering with museums,

cultural organizations, and other not-for-profits.

Some of the projects that Crystal is proudest of are those where her professional experience has been lent to community projects in volunteer roles. Beginning in 2016, she led a volunteer team of over 50 people who sponsored a Syrian refugee family of seven, provided community supports to five newcomer families, and who engaged with community and government organizations to improve or develop supports in a quickly evolving environment. That group is now working to sponsor another couple to settle in Edmonton in 2020. The services Crystal provides are purposeful in their intent to build systems and capacity to achieve positive outcomes for communities.





Intelligent Futures is a firm of versatile community problem solvers. At our core, we put people at the centre of the change process. By working at the intersection of design, engagement, strategy, and sustainability, we deliver memorable experiences and impactful results to our clients and their communities. Our core purpose is helping communities and organizations find better ways of living together.

We are a team of committed and collaborative community-builders, driven by curiosity, integrity, and passion, to strive for impact and take courageous action. Intelligent Futures is professional but unafraid to challenge sacred cows, diligent but relaxed, structured but creative.

Our approach to community challenges begins with finding the voice of the community as part of the solution. We have developed and refined an approach that infuses community conversations with creativity, respect and learning to blend community expertise with professional expertise. We strongly believe that this is the only way to effectively address the collective challenges that we face in our communities.

Our firm has a uniquely diverse range of experiences in all manner of community challenges, including urban agriculture, infill development, social wellbeing, community livability, indicator development, community engagement, cultural planning, affordable housing, environmental planning and community sustainability.

No matter the context of our work, Intelligent Futures remains true to our core purpose of helping communities find better ways of living together. We are guided by three core values in everything we do - from the projects we deliver, to how we hire and how we evaluate our performance.

Stay curious. Intelligent Futures is a place where we are constantly pushing ourselves and the people we work with to learn, improve, and leave a lasting impact on the world around us.

Always strive for amazing work. Intelligent Futures always ensures that we are producing the best quality work and processes possible for our clients, team, and collaborators.

Take courageous action. Intelligent Futures is a company that thrives by taking action in places and in ways that others won't. We are a team of boundary-pushing innovators, always looking to expand our limits, and evolve our practice and expertise.



Intelligent Futures is committed to work of the highest standard. We have been grateful to receive awards from the following organizations:

The Canadian Institute of Planners (x7)

The Alberta Professional Planners Institute (x6)

The Planning Institute of British Columbia (x1)

The Commonwealth Association of Planners (x1)

The International Association for Public Participation (x1)

The Alberta Urban Municipalities Association (x1)

The Economic Developers Association of Canada (x1)



To complement our project work, we started the 360 Degree City podcast in February 2018 to share insights and stories to help folks see their own community from a different angle. Guests have included community innovators from Brooklyn, Amsterdam, New Orleans, Copenhagen and Detroit (to name a few).

Since 2014, our processes have engaged over **50,000** citizens, generating over **100,000** ideas.



John Lewis MCIP M.E.DES.

is Intelligent Futures' President & Founder

January 2008 – present

As the founder and President of Intelligent Futures, I am always working to find better ways of living together through creativity and collaboration.

SELECT PROJECT EXPERIENCE

Child-Friendly Public Art in Edmonton's Civic Precinct
City of Edmonton 2019
Engagement strategy development; stakeholder facilitation.

Biodiverse Communities
City of Calgary, 2019 - 2020
Strategy development; stakeholder facilitation.

Banff Environmental Master Plan
Town of Banff, 2018 - 2019
Strategy development; engagement strategy design; project support.

Strathcona County Community Hub
Strathcona County, 2018
Strategy development; Community engagement and facilitation; engagement strategy design; project management

Public Art, Flanders Avenue Interchange
Canada Lands Company, 2017-2018
Engagement design; stakeholder facilitation; data analysis and reporting.

Ephemeral & Intermittent Streams Planning Policy
City of Calgary, 2016 - 2017
Planning policy development; project support.

» **2019 Canadian Institute of Planners**
Award of Planning Excellence - Planning Practice

» **2019 Alberta Professional Planning Institute**
Award of Planning Merit - Special Study

Olympic Plaza Cultural District
City of Calgary, 2016
PROJECT LEAD. Strategy development; community engagement and facilitation; engagement strategy design; project management.

Urban Agriculture Strategy
Strathcona County, 2016
PROJECT LEAD. Strategy development; community engagement and facilitation; project management;
» **2017 Alberta Professional Planners Institute**
Award of Merit - Comprehensive Policy Plan

Community Sustainability Plan
Town of Okotoks, 2015 - 2016
PROJECT LEAD. Strategy development; community engagement and facilitation; engagement strategy development; project management.

No. 264: A New Vision for the Kensington Legion Site
Truman Developments, 2015 - 2016
Community engagement and facilitation; engagement strategy development; project management.

» **2016 Canadian Institute of Planners**
Award of Planning Merit - Planning Practice

Edmonton City Museum Project
Edmonton Heritage Council, 2015
PROJECT LEAD. Community engagement and facilitation; research; project management; strategy development.

» **2016 Alberta Professional Planners Institute -**
Award of Planning Merit - Special Study

West District
Truman Developments, 2014
Community engagement and facilitation; engagement design; research.

» **2019 Alberta Professional Planners Institute -**
Award of Planning Merit - Design Plan



EDUCATION & TRAINING

Master of Environmental Design (Planning)
University of Calgary, 2002

Bachelor in Environmental Studies (Honours)
York University, 1997

Cert. Public Participation
International Association for Public Participation, 2012

SELECT PROFESSIONAL EXPERIENCE

Planner
City of Calgary, 2001 - 2007

Planning Technician
City of Edmonton, 2000

PROFESSIONAL AFFILIATIONS

Full Member (MCIP / RPP)
Canadian Institute of Planners
Alberta Institute of Planners

Full Member
International Association for Public Participation

SELECT CONTRIBUTIONS & RECOGNITION

Award for Planning Excellence, Planning Publications and Media for 360° City (as Podcast Host)
Canadian Institute of Planners, 2019

Award of Planning Merit, Design Plan for 360° City (as Podcast Host)
Alberta Professional Planners Institute, 2019

Cassandra Caiger M. PL.

is Intelligent Futures' Engagement Lead.

June 2013 – present

As the Engagement Lead of Intelligent Futures, I deliver thoughtful planning processes built upon strong relationships between citizens and decision-makers.

SELECT PROJECT EXPERIENCE

Fort Saskatchewan Municipal Development Plan

City of Fort Saskatchewan, 2019 - present

PROJECT LEAD. Community engagement and facilitation; strategy development; editing; engagement design; project management.

Child-Friendly Public Art in Edmonton's Civic Precinct

City of Edmonton 2019

Community engagement and facilitation; engagement design; artist coordination; project management.

Airdrie Placemaking Strategy

City of Airdrie, 2019 - 2020

PROJECT LEAD. Community engagement and facilitation; strategy development; editing; engagement design; project management.

Sparwood Livability Study

District of Sparwood, 2018 - 2019

PROJECT LEAD. Strategy development; performance measurement; engagement design; community engagement and facilitation; data analysis; project management.

Banff Environmental Master Plan

Town of Banff, 2018 - 2019

Community engagement and facilitation; engagement design; research.

Connect Bonnie Doon

Morguard Investments, 2017 - 2018

PROJECT LEAD. Community engagement and facilitation; visual design; strategy development; project management.

Electric Vehicles Strategy

City of Edmonton, 2017

Engagement design; stakeholder facilitation; data analysis; project management.

Public Art, Flanders Avenue Interchange

Canada Lands Company, 2017-2018

Engagement design; stakeholder facilitation; data analysis and reporting.

Urban Agriculture Strategy

Strathcona County, 2016

Engagement design; facilitation; engagement analysis and reporting; strategy development.

» **2017 Alberta Professional Planners Institute
Award of Merit - Comprehensive Policy Plan**

Community Sustainability Plan

Town of Okotoks, 2015 - 2016

Community engagement and facilitation; research; engagement analysis and reporting; strategy development.

No. 264: A New Vision for the Kensington Legion Site

Truman Developments, 2015 - 2016

Community engagement and facilitation; engagement strategy development; editing; research support.

» **2016 Canadian Institute of Planners
Award of Planning Merit - Planning Practice**

Edmonton City Museum Project

Edmonton Heritage Council, 2015

Community engagement and facilitation; information and visual design; strategy development; research.

» **2016 Alberta Professional Planners Institute -
Award of Planning Merit - Special Study**



EDUCATION & TRAINING

Master of Urban and Regional Planning

Queen's University, 2013

Bachelor of Arts in Geography and Business (Honours)

Wilfred Laurier University, 2010

Cert. Public Participation Foundation and Techniques

International Association for Public Participation, 2017

SELECT PROFESSIONAL EXPERIENCE

Planning Assistant (Infrastructure)

Government of Alberta, 2012

PROFESSIONAL AFFILIATIONS

Candidate Member

Canadian Institute of Planners
Alberta Institute of Planners

Full Member

International Association
for Public Participation

SELECT CONTRIBUTIONS & RECOGNITION

President's Award for Young Planners

Canadian Institute of Planners, 2019

"Mapping happy in Saskatoon:
Place-based engagement in action."

CIP / SPPI Annual Conference, 06/2015

Jeff Robson MCIP MUP

is Intelligent Futures' Design Lead.

January 2014 – present

As a part of the Intelligent Futures team, I deliver strategic policy initiatives and link effective communication and visual design to the planning process.

SELECT PROJECT EXPERIENCE

'Letters Home' Historical Signage Project

Canada Lands Company, 2019 - 2020

Art direction; visual design;
project management support.

Biodiverse Communities

City of Calgary, 2019 - 2020

PROJECT LEAD. Facilitation; visual design;
strategy development; project management.

» 2020 Canadian Institute of Planners

**Award of Planning Excellence - New and
Emerging Planning Initiatives**

Banff Environmental Master Plan

Town of Banff, 2018 - 2019

PROJECT LEAD. Community engagement and
facilitation; visual design; strategy development;
project management.

Brooks Region Branding & Communications Strategy

City of Brooks, 2017 - 2018

PROJECT LEAD. Facilitation; visual design;
strategy development; project management.

» 2019 Economic Developers Association of Canada

Marketing Canada Award - Brand Identity

Ephemeral & Intermittent Streams Planning Policy

City of Calgary, 2016 - 2017

PROJECT LEAD. Facilitation; information and visual
design; planning policy; project management.

» 2019 Canadian Institute of Planners

Award of Planning Excellence - Planning Practice

» 2019 Alberta Professional Planning Institute

Award of Planning Merit - Special Study

Olympic Plaza Cultural District

City of Calgary, 2016

Community engagement and facilitation;
information and visual design.

Urban Agriculture Strategy

Strathcona County, 2016

Community engagement and facilitation;
information and visual design, strategy
development.

» 2017 Alberta Professional Planners Institute

Award of Merit - Comprehensive Policy Plan

Community Sustainability Plan

Town of Okotoks, 2015 - 2016

Community engagement and
facilitation; information and
visual design; strategy development.

No. 264: A New Vision for the Kensington Legion Site

Truman Developments, 2015 - 2016

Community engagement and facilitation;
engagement strategy development; visual design.

» 2016 Canadian Institute of Planners

Award of Planning Merit - Planning Practice

Edmonton City Museum Project

Edmonton Heritage Council, 2015

Community engagement and facilitation;
information and visual design; strategy
development; research.

» 2016 Alberta Professional Planners Institute -

Award of Planning Merit - Special Study

West District

Truman Developments, 2014

Community engagement and facilitation;
information and visual design; research.

» 2019 Alberta Professional Planners Institute -

Award of Planning Merit - Design Plan



EDUCATION & TRAINING

Master of Urban Planning

McGill University, 2011

Bachelor of Arts in History,

Minor in Geography (distinction)

University of Calgary, 2009

Computer Science Coursework

Athabasca University, 2019 - present

Urban Design Coursework

Simon Fraser University, 2012 - 2013

SELECT PROFESSIONAL EXPERIENCE

Municipal Planning Intern

Strathcona County, 2012 - 2013

Graphic Designer

Freelance, 2010 - 2013

Graduate Research Assistant

Transportation Research at McGill, 2010

PROFESSIONAL AFFILIATIONS

Full Member (MCIP / RPP)

Canadian Institute of Planners

Alberta Institute of Planners

SELECT CONTRIBUTIONS & RECOGNITION

"The Planning Storefront Revival: A Design Approach"

World Design Summit, 10/2017

"Mapping happy in Saskatoon: Place-based engagement in action."

CIP / SPPI Annual Conference, 06/2015

"What's Your City? Encouraging engagement through visual design."

CIP / APPI Annual Conference, 10/2012

Helen Loghrin M.Sc.Pl.

is Intelligent Futures' Planner

September 2019 - present

As a Planner with Intelligent Futures, I work to research innovative practices, create user-friendly visual design, and facilitate innovative engagement practices, to improve citizen livelihoods.



SELECT PROJECT EXPERIENCE

Lethbridge Waste Management Master Plan

City of Lethbridge, 2020 - present

Research; graphic design; engagement analysis.

London Re-think Zoning

City of London, 2020 - present

Research; graphic design; engagement collateral development.

Calgary Better Housing Solutions Lab

Canadian Mortgage and Housing Corporation (CMHC),
2020 - present

Website development; research; graphic design.

Calgary Innovation Centre Engagement

Platform Calgary, 2020

Workshop facilitation and analysis;
graphic design; image rendering.

Airdrie Placemaking Strategy

City of Airdrie, 2019 - 2020

Strategy development; research;
engagement facilitation; visual design.

Biodiverse Communities

City of Calgary, 2019 - 2020

Research; image rendering;
engagement facilitation.

» 2020 Canadian Institute of Planners

**Award for Planning Excellence - New and
Emerging Planning Initiatives**

Circular Cities

Recycling Council of Alberta, 2019 - 2020

Engagement facilitation and analysis.

Community Sustainability Plan

Town of Blackfalds, 2019 - 2020

Research; strategy development;
engagement facilitation; visual design.

Town of Okotoks Land use Bylaw Re-write

Town of Okotoks, 2019 - 2020

Engagement and workshop facilitation and
analysis; engagement collateral design.

Child Friendly Public Art Engagement

City of Edmonton, 2019

Child engagement facilitation and analysis.

Town of Morinville Transportation Master Plan

Town of Morinville, 2019 - 2020

Engagement and workshop facilitation and
analysis.

EDUCATION & TRAINING

Master of Science, Planning

University of Toronto, 2019

Bachelor of Arts in Architectural Studies, Design, Geography, and GIS (Honours, Distinction)

University of Toronto, 2017

Indigenous Canada Certificate

University of Alberta, 2020 - Present

SELECT PROFESSIONAL EXPERIENCE

Planning Consultant

West End Coalition for Housing Justice,
2018 - 2019

Research Intern

Friends of the Greenbelt Foundation,
2018 - 2019

Student Planner

County of Grey, 2018

Heritage Planning Intern

ERA Architects, 2017 - 2018

SELECT CONTRIBUTIONS & RECOGNITION

Eddie Yoles Prize in Urban Planning

University of Toronto, 2019

Joseph-Armand Bombardier

Canada Graduate Scholarship

Social Sciences and Humanities

Research Council of Canada, 2018 - 2019

Jackie Brown

is Intelligent Futures' Communications Lead.

March 2008 – present

As a part of the Intelligent Futures team, I work to promote innovative community engagement through effective and approachable communication techniques.



SELECT PROJECT EXPERIENCE

Biodiverse Communities

City of Calgary, 2019 - 2020

Facilitation; communication strategy and messaging development; project management.

- » **2020 Canadian Institute of Planners Award of Planning Excellence - New and Emerging Planning Initiatives**

Banff Environmental Master Plan

Town of Banff, 2018 - 2019

Communication strategy and messaging development

Currie Urban Alexandria Park

Canada Lands Company, 2018

Communication strategy; messaging; tactics and implementation.

Brooks Region Branding & Communications Strategy

City of Brooks, 2017 - 2018

Communication strategy; messaging; tactics and implementation.

- » **2019 Economic Developers Association of Canada Marketing Canada Award - Brand Identity**

Olympic Plaza Cultural District

City of Calgary, 2016

Community engagement and facilitation; information and visual design.

Urban Agriculture Strategy

Strathcona County, 2016

Communication strategy; messaging; tactics and implementation.

- » **2017 Alberta Professional Planners Institute Award of Merit - Comprehensive Policy Plan**

No. 264: A New Vision for the Kensington Legion Site

Truman Developments, 2015 - 2016

Community engagement and facilitation; engagement strategy development; visual design.

- » **2016 Canadian Institute of Planners Award of Planning Merit - Planning Practice**

Downtown Streetscape Enhancement Project

City of Grande Prairie, 2015

Communication strategy; messaging; tactics and implementation.

- » **2016 Canadian Institute of Planners Award of Planning Excellence Merit - Urban Design**

West District

Truman Developments, 2014

Community engagement and facilitation; information and visual design; research.

- » **2019 Alberta Professional Planners Institute - Award of Planning Merit - Design Plan**

EDUCATION & TRAINING

Diploma of Journalism

Mount Royal College, 1986

Technical Writing Certificate

Mount Royal College, 2015

Professional development in crisis communications, web development, media training

Ongoing

SELECT PROFESSIONAL EXPERIENCE

Senior Partner

Verb Media, 2007 - present

Senior Corporate Affairs Advisor

Calgary Health Region, 1990 - 1997

Writer / Editor

NovAtel Communications, 1988 - 1990

SELECT CONTRIBUTIONS & RECOGNITION

Gold Quill International Award of Merit for Foothills Magazine

International Association of Business Communicators

National hygeia Award for Foothills Magazine

Health Care Public Relations Association

hygeia Awards for Special Publications:
Electric Production, Publications,
Weekly Newsletter & Annual Report
Health Care Public Relations Association





APPENDIX B

HATLIE GROUP PROPOSAL

HERITAGE CALGARY

NAMING, RENAMING & COMMEMORATION PROCESS DESIGN



Date: November 6, 2020

Proposal Consultants: Alexandra Hatcher & Crystal Willie

PROVIDED BY

HATLIE
GROUP ★

November 6, 2020

ATTENTION: Josh Traptow, Executive Director, Heritage Calgary

RE: Heritage Calgary - Naming, Renaming & Commemoration Process Design

Dear Mr. Traptow:

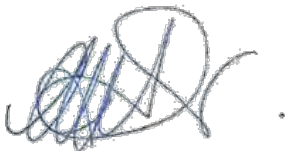
We are delighted to submit our proposal to work together on designing the instrument to develop a process for navigating naming, renaming and commemoration in the City of Calgary. Having an inclusive, intentional and professional approach to this timely and important process is both wise, and prudent, for the City of Calgary. Working together with Heritage Calgary is the ideal way to ensure that the process is grounded in the learning and emerging best practices in commemoration and naming in the heritage sector and lead by professionals who are invested in the community.

This proposal is put forward by Hatlie Group, a cultural services and consulting firm founded by Alexandra Hatcher and Crystal Willie. Working as a team, we have extensive experience in not-for-profit governance, policy development, facilitation, strategic planning and stakeholder engagement, specifically in the heritage sector. Our experience is matched by a deep understanding of the power and promise of story and history in building community, and current trends and best practices to support success in organizations of varying size and scope.

The enclosed proposal outlines our approach to developing a Process Design for the practice of making decisions around naming, renaming and commemoration in Calgary. We believe that the best approach is a collaborative one, so we would anticipate refining the proposed methodology and tactics together with you and your team. Our approach, timeline, and fee schedule are open to discussion and adjustment based on a more informed understanding of the project needs.

We look forward to the opportunity to discuss this proposal with you.

Sincerely,



Alexandra Hatcher, Partner



Crystal Willie, Partner

CONTENTS

—

PROJECT SUMMARY.....	3
APPROACH AND METHODOLOGY	3
A FURTHER NOTE ON COVID-19.....	8
OUR TEAM	9
PROJECT SCHEDULE, DELIVERABLES & FEES	12
CONTACT	14

HATLIE
GROUP ★

PROJECT SUMMARY

Heritage Calgary is a respected and professional voice for heritage in Calgary. The relationships and network that you bring to questions of historical commemoration position Heritage Calgary ideally to partner with the City of Calgary in developing a process to make intentional, inclusive and enduring decisions around naming, renaming and commemoration. Reconciliation is a “process of healing of relationships that requires public truth sharing, apology and commemoration that acknowledge and redress past harms.”¹ As the sector contends with the implications of commemoration and historical interpretation in the context of reconciliation, Indigenous cultural resurgence and the far reaching impact of important social movements like Idle No More, Black Lives Matter, Me Too, Murdered and Missing Indigenous Women and Girls and other actions that challenge systemic barriers and bias in our communities, it has become clear that a new approach to naming, renaming and commemoration is critical in our cities in the long term. In fact, while these conversations have risen to prominence in the media recently, within the heritage sector these conversations have been percolating, and occasionally raging, for decades. Building on this learning and tackling these questions intentionally and thoughtfully is the ideal way to ensure that Calgary leads in deciding for themselves how choices about public memory are made.

The project summary outlined here provides our initial thoughts as to how to build a system and process for naming, renaming and commemoration that is:

- Executed by experts
- Led by community
- Includes diverse stakeholders

The project team envisions success as: delivering a creative, sensitive, and impactful process for individuals, groups, businesses, and the Indigenous community to address naming, renaming and commemoration.

The proposed process is Hatlie Group’s recommendation to achieve the outcomes set for this project and is completely negotiable to suite your preferences or timelines.



¹ Calgary Aboriginal Urban Affairs Committee (CAUAC). *White Goose Flying, A Report to Calgary City Council on the Indian Residential School Truth and Reconciliation Calls to Action*. (City of Calgary, 2016): 29.

APPROACH AND METHODOLOGY

The Consultant Team would work with Heritage Calgary, and a Project Advisory Team that includes key stakeholders, to design a process to guide the decision making around naming, renaming and commemoration in Calgary. The project approach would be systems-based, looking at the structures, policies, people and relationships that support the work and is designed to be iterative and responsive; allowing the project team to monitor, assess and adjust the process when it is clear that the community and stakeholders require it. The project will embrace the principles outlined for it by Heritage Calgary, designing a system and process for naming, renaming and commemoration that is:

- Executed by experts
- Led by community
- Includes diverse stakeholders

Project work will often run concurrently and is described briefly below on the assumption that the bulk of the will be completed by December 2021.



1. SCOPE & CONTRACTING

- Organizational Learning and Document Review
- Establish the Project Advisory Team
 - Membership could include representatives from the City, community, Heritage Calgary (staff & Board) and key stakeholders
 - Clarify the Project Advisory Team role to guide the project through a Terms of Reference
 - Determine communication and meeting expectations
- Kickoff Meeting
 - Initial meeting with Project Advisory Team
 - Set outcomes for the project

2. PROJECT ADVISORY TEAM COMMUNICATION & SUPPORT

- Attend key stakeholder meetings
- Once a month Project Advisory Team meetings (or as agreed)
- Ongoing communication as required
- Overarching Project Management
- Support with City Council presentations / work

3. STAKEHOLDER MAPPING & COMMUNITY CONSULTATION

- Identify primary stakeholders in the community
- Identify secondary stakeholders for future consultation
- Develop Community Consultation Strategy for identified stakeholders based on IAP2 Spectrum:
 - Inform | Consult | Involve | Collaborate | Empower

4. COMMUNICATIONS STRATEGY

- Engage a Communications Firm (contracted by Heritage Calgary). Working with the communications firm, Hatlie Group will:
 - Advise and lead goal setting for a communications strategy and establishing key messaging
 - Manage communication timing and strategy to support project outcomes and key relationship building
- Develop Champions Campaign
 - Determine the project champions
 - Identify challenges and potential mitigation strategies

5. INTERNAL & EXTERNAL SCAN

- Identify who else is doing this work - internal (within the City), to ensure alignment and mitigate duplication and potential integration to this process
- Identify who else is doing this work - external agencies, NGOs, community-based groups, academic community, to ensure alignment, mitigate duplication and potential integration to this process
- Identify which City of Calgary policies or reports need to be considered i.e. White Goose Flying Report; Municipal Naming, Sponsorship and Naming Rights Policy

6. LITERATURE REVIEW & BEST PRACTICES REVIEW

- Identify 3 - 4 case studies in relevant jurisdictions
- Review experiences of other naming / renaming / commemoration issues in similar jurisdictions - especially from the municipal lens
- Determine best practices for consideration in the Calgary context

7. COMMUNITY / STAKEHOLDER CONSULTATION

Phase 1 - Primary Stakeholder Consultation

- Based on Community Consultation Strategy, determine appropriate tools to gather information, including but not limited to:
 - Individual Interviews (key stakeholders) - *explore specific issues and concerns*
 - small group sessions (key community groupings) - *explore issues and concerns*
 - online surveys (large stakeholder groups) - *explore trends and relationships*

Phase 2 - Analysis

- Analyze and assess data gathered through consultation process to identify and confirm strategic issues

Phase 3 - Primary Stakeholder Consultation

- Review initial Strategic Issues Identification with select primary stakeholder groups

8. COMPILE & ANALYZE FINDINGS / DELIVER RESEARCH REPORT & PROCESS DESIGN

- Draft final Research Report inclusive of the Process Design
- Work with Project Advisory Team to review and revise
- Editing and design
- Deliver final report

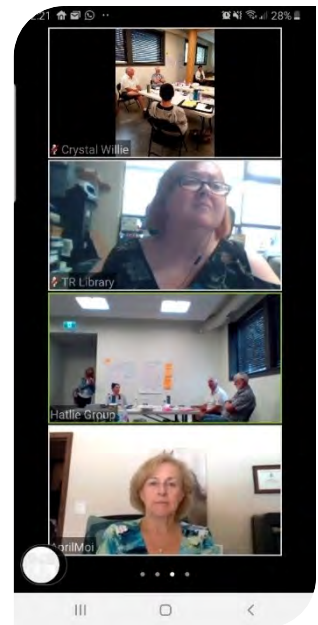


A FURTHER NOTE ON COVID-19

Hattie Group always works remotely but is additionally not conducting client visits or in person meetings for the time being in respect of non-essential travel limitations and stay safe, remote work and physical distancing recommendations issued by public health authorities except in very limited circumstances when requested by the client. These recommendations change regularly and therefore we are willing to reassess approaches outlined in this proposal, together with our clients, to provide the best service we can with a priority on keeping our clients, our team and our communities safe. We will at all times follow mandatory public health orders.

When an in-person gathering or session is deemed desirable by the client, we have a COVID-19 Safety Compliance Policy that we follow and share. When required, we have successfully conducted sessions in-person and in-compliance with all public health advice often with a digital component for those not comfortable or able to attend in-person.

We are adept at video conferencing and other remote work technologies – so we continue to be able to offer a high quality of service to our clients. We will adapt our working relationships as restrictions change and it is safe for our staff, clients and their stakeholders to meet and gather. The work outlined in this proposal can be completed entirely remotely if required.



RESOURCES AVAILABLE TO THE HATLIE GROUP TEAM FOR WORK DURING THE PANDEMIC:

- Experience working in remote and online formats
- Extensive planning experience to draw on in adapting how we work
- A team of two experienced Partners, five talented and capable Associates, and additional dedicated administrative support to draw on
- Members of the Mural Consultants Network – an online collaboration space allowing interactive workshops that allow participants to actively participate, including a video conferencing capability
- Corporate Accounts for Survey Monkey, Doodle, Trello, Asana, Sign Up Genius, Zoom / Zoom Webinar, Microsoft Teams, Dropbox and others to facilitate remote community-based projects



OUR TEAM

At **Hatlie Group**, we aid non-profit organizations in transitioning management and governance practice to support operating strong, healthy, sustainable organizations. Hatlie Group was founded in March 2019 as a partnership between Alexandra Hatcher Consulting Inc. and Purple Aspen Inc., owned and operated by Crystal Willie. Crystal and Alexandra lead a team of Associates and colleagues with specific expertise to carry out the work required to ensure an organization's success. Based in Calgary and Edmonton, Hatlie Group works with clients in Alberta and across Canada.

Our team would work collaboratively with your project team and staff. [Additional Hatlie Group Associates](#) and administrative and project support will be drawn on to meet project timelines and goals as required.

ALEXANDRA HATCHER CLIENT LIAISON AND FACILITATION LEAD



As an employee, board member, facilitator, contractor, and volunteer, Alexandra Hatcher has worked with, and for, non-profit and public sector cultural organizations for over twenty-five years. As a consultant, Alexandra supports organizations by facilitating change and building capacity in the arts and heritage sector. In March 2019, Alexandra partnered with Crystal Willie of Purple Aspen Inc. to form Hatlie Group.

Previously in her career, as the Director, Musée Héritage Museum, Alexandra was responsible for all areas of museum practice and administration, including research, programming, curatorial, and collections management. Alexandra was an integral member of the team that worked to transfer the museum and heritage sites from a municipal department to a nonprofit entity, amalgamating with the local art gallery to form the Arts and Heritage Foundation of St. Albert.

Alexandra was the Executive Director / CEO of the Alberta Museums Association (AMA) from 2009 to 2014. Under her leadership, the AMA launched a number of initiatives including the Sustainability Working Group, Robert R. Janes Award for Social Responsibility, and the Community Engagement Initiative. And from 2014 to 2017, Alexandra was Director of Site Operations for Alberta Culture and Tourism's Historic Sites and Museums, overseeing fourteen museums, interpretive centres, and historic sites located around the province, including Head-Smashed-In Buffalo Jump UNESCO World Heritage Site.

- Bachelor of Arts (Distinction) Art History, University of Winnipeg, 1996
- Certificate (Distinction), Arts and Cultural Management, MacEwan University, 1999
- Master of Public Administration, Museum and Gallery Management, University of Victoria, 2010

In spring 2017, Alexandra established her consulting and project management practice. Recent clients include United Way Calgary where she supported the initial stages of a community wide initiative to support resilient children and families; Arts Commons, where she worked with the staff, and leadership team, to support organizational change management; and the City of Calgary's Public Art Program, where she has held the role of Facilitator for the Moh'kinsstis Public Art Guiding Circle since July 2017.

CRYSTAL WILLIE PROCESS DESIGN LEAD



- Bachelor of Arts (Distinction), Concordia University College of Alberta, 2000
- Master of Arts, History, University of Alberta, 2004
- Professional Specialization Certificate in Cultural Heritage Sector Leadership, University of Victoria, 2012

Crystal Willie provides consulting services to cultural sector organizations and not-for-profits, primarily in the areas of project management, policy development, program review, and planning. In March 2019, Crystal partnered with Alexandra Hatcher of Alexandra Hatcher Consulting Inc. to form Hatlie Group.

Crystal has worked with community organizations from small arts cooperatives to provincial and municipal government agencies and departments. Clients include the Edmonton Arts and Heritage Councils, Calgary Stampede, Alberta Aviation Museum, Jasper Yellowhead Museum & Archives, Millet & District Museum, Archives Society of Alberta, Alberta Foundation for the Arts, City of Lethbridge, and the National Music Centre.

Since starting Purple Aspen in 2013, Crystal has worked independently or led collaborations to deliver projects including organizational transition and revisioning, needs assessments, cultural planning, interpretive planning and visitor experience assessments, a grants program review, emergency and disaster planning, and governance and operational policy development. Crystal led the heritage team in a consultant collaboration to develop the City of Edmonton's Arts & Heritage Plan, *Connections & Exchanges*, and a communications strategy for the Archives Society of Alberta that included membership demographic, program use and needs assessment research. Crystal worked with the Alberta Aviation Museum in 2019 to undergo a comprehensive business planning exercise that considered all aspects of governance, management and museum operations.

At the Alberta Museums Association, where Crystal worked for 12 years, she was responsible for the organization's operations and human resources portfolio, including supervising staff and contractors and managing a dynamic team structure to

maximize the capacity of the organization. She led organizational performance assessment programs such as the Recognized Museum Program and the Museum Excellence Program, employing outcome-based evaluation techniques to all areas of museum practice. She is the editor and project manager of the *Standard Practices Handbook for Museums*, 3rd Edition (2014) and *HELP! An Emergency Preparedness Manual for Museums*, 2nd Edition (2018). Both publications are used as textbooks in museum studies programs and sell internationally.

Crystal was a member of the Steering Committee to establish the Edmonton Heritage Council and served on the board for five years, including as its chair. She has a Master of Arts from the University of Alberta, a Professional Specialization Certificate in Cultural Heritage Sector Leadership from the University of Victoria, and over twenty years of experience working and volunteering with museums,

cultural organizations, and other not-for-profits.

Some of the projects that Crystal is proudest of are those where her professional experience has been lent to community projects in volunteer roles. Beginning in 2016, she led a volunteer team of over 50 people who sponsored a Syrian refugee family of seven, provided community supports to five newcomer families, and who engaged with community and government organizations to improve or develop supports in a quickly evolving environment. That group is now working to sponsor another couple to settle in Edmonton in 2020. The services Crystal provides are purposeful in their intent to build systems and capacity to achieve positive outcomes for communities.



PROJECT SCHEDULE, DELIVERABLES & FEES

Total Project Fees: \$ 95,000 (exclusive of GST) ★

Project Duration: March, 2021 to December, 2021

Consultant Team: Hatlie Group: Alexandra Hatcher, Crystal Willie, and Associates as required

TIMELINE	DELIVERABLES & MILESTONES	FEE
Initiate Project: March 2021 Kick-Off Meeting March 2021 Included throughout Project	Project Scope, Coordination, Communication & Meeting Support <ul style="list-style-type: none"> Contract signed Project start: materials provided to Consultant Team Project management, scheduling, communication, reporting Online project management supports Establish Project Advisory Team / draft TOR Monthly check-ins / status report process agreed upon Attend scheduled meetings via phone or video conferencing as required / requested throughout project Kick-off Meeting Support with City Council presentations / work as required 	\$ 16,000
April 2021	Stakeholder Mapping <ul style="list-style-type: none"> Identify primary stakeholders in the community Identify secondary stakeholders for future consultation Develop Community Consultation Strategy 	\$ 4,000
April 2021 – May 2021	Communications Strategy <ul style="list-style-type: none"> Advise and lead goal setting for plan and work on key messaging Develop Champions Campaign 	\$ 5,000
April – August 2021	Internal and External Scan <ul style="list-style-type: none"> Research / review related work 	\$ 5,000
April – August 2021	Literature Review and Best Practices Review <ul style="list-style-type: none"> Research / review relevant jurisdictions Identify best practices 	\$ 10,000
June – October 2021	Community / Stakeholder Consultation <ul style="list-style-type: none"> Phase 1 – primary stakeholder consultation Phase 2 – analysis Phase 3 – strategic issues identification 	\$ 40,000
October – December 2021	Compile & Analyze Findings and develop Research Report with the Process Design <ul style="list-style-type: none"> Draft Report and Process Design Work with Project Advisory Team to review and revise Editing and design Deliver final report 	\$ 15,000

Fee Schedule:		
March 15, 2021	Invoice #1 - Deposit	\$ 15,000
May 15, 2021	Invoice #2 - Interim Fees	\$ 13,000
July 15, 2021	Invoice #3 - Interim Fees	\$ 13,000
August 15, 2021	Invoice #4 - Interim Fees	\$ 13,000
September 15, 2021	Invoice #5 - Interim Fees	\$ 13,000
November 15, 2021	Invoice #6 - Interim Fees	\$ 13,000
December 31, 2021	Invoice #7 - Final Fees	\$ 15,000

NOTES:

★ This quote contemplates a fixed fee-for-service contract with Heritage Calgary. It is not an hourly rate billings schedule though our hourly rate is provided as requested. Fees are determined based on anticipated time spent on the project by Hatlie Group Partners and Associates including sub-contracted services when specialized expertise is required. *A billing schedule is suggested in italics allowing for an initial deposit, interim fees and final invoicing upon completion of agreed upon deliverables. Deposits are non-refundable.* Fees and billing schedule as proposed are negotiable. GST is not included. Travel is likewise not included on the assumption that an in-person sessions will not be recommended during the pandemic. Most of the proposed team is Calgary based, though Crystal Willie is Edmonton based. Expenses for additional travel, if requested and approved by the client, will be reimbursed at cost and utilizing CRA 2020 mileage rates upon receipt of an invoice. Phone and videoconferencing will be utilized whenever possible to keep project expenses low. Any material changes to the scope or fees shall be agreed to in writing.

All room bookings, AV support, catering and supplies will be solely arranged by the client. Heritage Calgary would have a role in key stakeholder interviews and work on the Project Advisory team. Heritage Calgary would contract a communications firm to develop and carry out a strategic communications campaign to support the work. Hatlie Group would work with his firm to ensure messaging and tactics align closely with the project plan and, together with Heritage Calgary, manage the timeline and implementation of the strategy which would be executed by the communications firm. All attendant expenses are the responsibility of the client and do not constitute any portion of the contracted fee to Hatlie Group. Implementation of all planning documents, tools and templates, and other processes will be the responsibility of client. All pre-existing Intellectual Property remains the property of the organization, individual, partnership or corporation it belonged to at the start of the project. Material developed throughout the course of the project will be provided to Heritage Calgary through a non-exclusive license and their use of the material for non-profit purposes in the regular course of operating will not be restricted. This agreement can be terminated by either party with 30 days written notice. Fees for work completed up until that date will be due upon receipt of an Invoice.

CONTACT

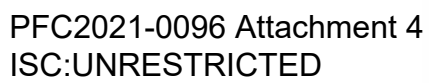
Thank you for considering this proposal. Please note that the approach, schedule and fees can be negotiated if required. If you have any questions, we can be reached as per below:



Alexandra Hatcher
alexandra@hatliegroup.ca
403.816.1339
www.hatliegroup.ca

Crystal Willie
crystal@hatliegroup.ca
780.993.4985
www.hatliegroup.ca







APPENDIX C

RISK MITIGATION TABLE



RISK MITIGATION TABLE

PROJECT RISK

RISK MITIGATION

CRISIS MANAGEMENT

Crisis Management. Given the complexity and sensitivity of this work, this project is at risk of encountering situations where engagement and communications go awry

The project team understands that management of media interactions, keeping lines of communication open to stakeholders, and the ability to ensure the project ship remains upright is paramount. We have identified the need to develop a strategic communications plan, a part of which includes a crisis communications component which may be implemented at the drop of a hat.

To do so, we have engaged Intelligent Futures as communications strategists and engagement support for this project. Intelligent Futures is an experienced firm with significant expertise that has handled engagement and communications for several contentious projects in the past. This task has been built into the project work-plan under Phase 3: Communications Strategy – Develop Strategic Communications Plan.

Further, both Hatlie Group and Heritage Calgary have experience in dealing with contentious cultural projects and media relations. All three project partners have their own communications protocols in place and experience in implementing a communications strategy, including an understanding of the importance of sharing the same predetermined message. We are confident that the collective project team will be able to manage any issue that may arise throughout the lifespan of this project efficiently and with ease.

COVID-19

COVID-19 Fatigue. This is important, urgent work, coming to the forefront during an impossibly difficult time. While the end of the current global pandemic appears to be on the horizon, there is still no certainty when this time may end. A project such as this may be put at risk by the fatigue and detachment so many are feeling as they grapple with COVID-19.

The project team recognizes COVID-19 fatigue as a legitimate issue facing many – including the project team. Regardless of this, the project team believes that urgent and important work must continue during this difficult and challenging time. Now may arguably be the best time to conduct this work, given the time we’ve been given to take a step back, breathe, and reset. Further, as has been previously mentioned in this proposal, the issues with and surrounding naming, renaming, and commemoration has not been muted or put on hold because of COVID-19 – rather, it is [clear](#) the [opposite](#) has [occurred](#).

Like so many others, the project team has had to adjust the way they work, and is accustomed and practiced conducting sensitive work such as this through various accommodating technological platforms, including MURAL, a digital visual collaboration program that seamlessly with standard virtual meeting platforms like Zoom. The project team is invigorated by the prospect of this work, and believes there is a strong appetite amongst stakeholder groups and, more broadly, the general public, to participate in authentic discussions about this topic leading to results-based and action-oriented outcomes.

Inadequate Technology Access.

This project is being prepared to take place almost exclusively through virtual methods due to the current restrictions placed on gathering. At risk is the ability for all stakeholders to participate given the need to rely on various technologies and communication methods.

The success of this project hinges on efficient and effective engagement and communication with stakeholder groups (to be identified in Phase 2 – Stakeholder Mapping). All project partners recognize and understand the importance of this. As such, the ability to adapt our schedules and accommodate the needs of the stakeholders. This means adapting to work with the technology they have available rather than imposing technology requirements on them, as well as additional measures such as ensuring engagement dates and times work for the stakeholder, as well as providing honorariums and gifts when the occasion calls for it.



PROJECT ADJUSTMENTS – SCOPE, TIMELINE, & BUDGET

Cost Overruns. A project that deals in the complexities and sensitivities of naming is at risk of one component of the project consuming a larger portion of the budget than anticipated.

Given the possibility of cost overruns for a project like this, all three project partners are committed to providing the scope of services detailed in the workplan of this proposal for a fixed fee – that is, the work will be completed for the price identified in the project budget. On the chance that additional work hours are required to complete a task within the identified scope of work (i.e. a second follow up 1-on-1 engagement session with a stakeholder who feels they need more time to discuss) we have identified a budget contingency amount of 5% of the overall project budget. This budget contingency will be administered by the project sponsor on an as-needed basis, with rationale of use to be detailed in final project fiscal reporting. Finally, anything that may occur during the lifespan of the project that requires additional funding can be handled by the project team – there is no need to hire or contract additional consultants.

Under-Estimating Timeline / Stakeholder Action Delays

Project. It can be challenging to identify the amount of time work that a project that deals in feelings and subjectivity may generate, and there is further risk that stakeholder demand may warrant the inclusion of additional necessary tasks during the lifespan of the project.

Although the overall goal of this project and its associated scope of work is clearly identified in this project proposal, it is possible that additional tasks or time that are within the project scope may be needed. This is one reason for approaching this project from a fixed fee for service way – the project team is confident that they will be able to complete the project for the fees stated in this project workplan.

Given the complexities and sensitivities this project proposes to deal with, the ability to be flexible and adaptable is imperative, and these are skills the dedicated project team have in their respective toolkits. We recognize that other necessary tasks may arise that the project team has not yet considered – this risk is mitigated through the inclusion of a budget contingency amount of 5% of the overall project budget. This budget contingency will be administered by the project sponsor on an as-needed basis, with rationale of use to be detailed in final project fiscal reporting.

Further mitigation of this risk includes additional time built into the workplan as necessary – while the project is intended to be wrapped up by July 2021, extension in time may be warranted and will be arranged for by the project team (until and no later than September 2021).

Scope Creep. A project such as the one proposed will face pressure of scope creep – additional features, tasks, or requirements may be requested by project stakeholders and will be tempting to add to the project.

Given the sensitivities of this project, additional work that is technically in scope but beyond the hours anticipated by the project team may be requested and/or required (i.e. a second follow up 1-on-1 engagement session with a stakeholder who feels they need more time to discuss).

Scope creep is always a risk to a project, and the project team is experienced in determining what is in scope and what is beyond the agreed upon project scope. The project team fully anticipates that not all questions will be answered within the scope of this project – this is, after all, a process design exercise, a time to engage in discussion with various stakeholder groups and learn from them. Questions the project team have not anticipated will be asked, issues we have not considered will be raised. This is the intention of the project, and the extent of what the project team learns will provide some measure of our success in engaging with these groups.

To mitigate this risk, we have proposed to deliver a process design informed and supported by stakeholder groups for a fixed fee for service. This project budgeting method ensures the risk of cost overruns are contained. Further mitigation efforts will be better detailed throughout this table, including: strong, clear, and direct communication methodology; managing project team resourcing capacity; etc.

COMMUNICATION RISKS

Complexity of Communications.

Sometimes, nuanced and sensitive topics cannot be easily communicated, which increases the risk of frustration amongst project team members, a dismantling of trust built between the project team and stakeholder groups, and friction between stakeholders.

The project team recognizes that strong, clear, and direct communication is key to ensuring this project's success. The project team is committed to implementing best practices in communication, including engaging a complex communications expert (Intelligent Futures), establishing parameters at the top of the project (Phase 1 – Project TOR), built in time and budget allowance for robust and ongoing communications, and the ability to simplify difficult to explain topics with visual materials. The recognition of the importance of strong, clear, and direct communication by the project team and their willingness to take the time to ensure communications are done right mitigates this project risk from day one.



**HERITAGE
CALGARY**