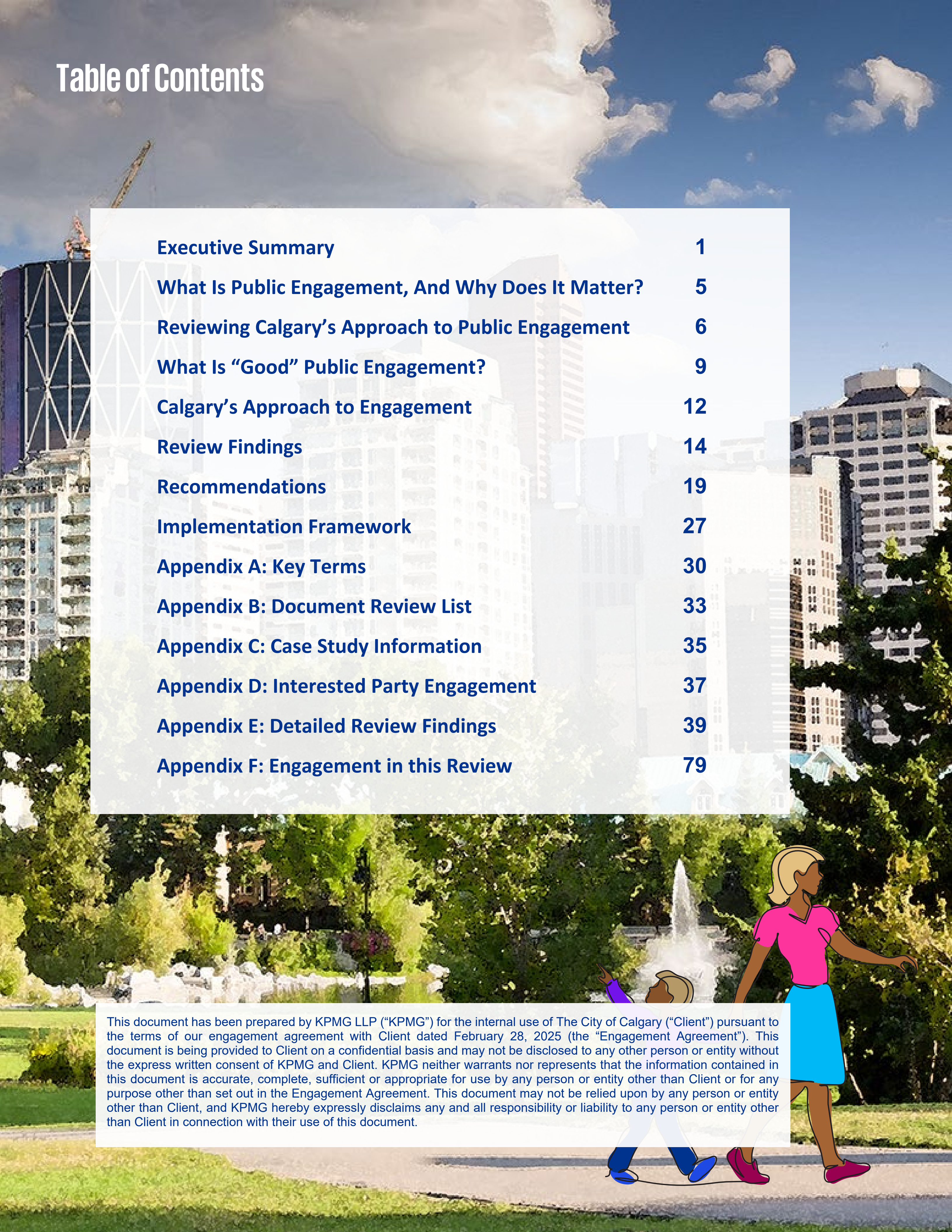
Strengthening Transparency:
Improving Engagement with Calgarians

Final Report

May 5, 2026



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Executive Summary

Why an engagement review, and why now?

Engagement means involving people in government decisions that affect them, beyond what is required by law. It is an important driver of public trust: almost 80 per cent of people that report having trust in government report they have a say in decisions.[1]

The City of Calgary (The City) is widely viewed as a model of excellence in public engagement, yet only 52% of Calgarians report that they trust The City – a statistic comparable to other jurisdictions in Canada and internationally[1,2].

Calgary City Council unanimously called for an independent third-party Review of The City's public engagement practices in October 2024 and engaged KPMG in February 2025 to develop actionable recommendations to help align The City's approach with leading practices.

What does "good" engagement look like?

This Review examined The City's practices in relation to 20 evidence-based benchmarks, each of which included multiple leading practices. The details of this analysis can be found in Appendix E.

At a high level, good engagement has four core elements (Figure 1):

Figure 1: Elements of Good Engagement

Source: Prepared by KPMG.

How does Calgary measure up?

Detailed benchmarking completed for The City identified many opportunities for operational fine tuning – including areas where The City is already a leader. However, fine tuning is unlikely to translate into measurable improvements in performance or results – such as significantly improved trust.

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[1] OECD, 2023. [OECD Survey on Drivers of Trust in Public Institutions 2024 Results - Country Notes: Canada | OECD]
[2] City of Calgary, 2025. [Calgarians show increased trust & optimism in spring research results]

Strategic analysis was completed to identify what issues appear to be having the greatest impact on The City's performance across all benchmarks, and to consider where potential changes or investments are likely to have the most meaningful impact on overall results. Three overarching findings emerged:

- **The City's policies are well-aligned with leading practice.** In most cases, The City already has the right policies and operational tools in place. Engagement is guided by the Engage Policy, which provides high-level direction for how engagement should be carried out at The City. An Engage Framework document explains how to plan, execute, and evaluate public engagement activities in alignment with the Engage Policy. Both of these directional documents align well with leading practices. The City also has a dedicated team of engagement subject matter experts with considerable knowledge of leading practices to help plan and deliver engagement – called the Engage Resource Unit (ERU).
- **There is not currently an effective approach to oversight.** Controls do not currently exist to make sure City staff follow policy direction, and the management of public engagement occurs ad hoc rather than programmatically. The ERU is not positioned to play an oversight role or to support The City's Executive Leadership Team in this way: it functions like an internal consulting group, offering advice without authority to make decisions about how engagement is done. As a result, The City's engagement practices often don't match its policies. Notable gaps between policy and practice include designing engagement to support specific decisions, making promises to the public about how their input will be used, and making sure tactical plans are informed by strong analysis of the audience(s) for engagement.
- **Stronger coordination is needed between relationship management and engagement.** Good relationships and good engagement are interdependent. Strong relationships lead to better engagement, which in turn leads to higher trust and fosters stronger relationships. The City's engagement guidelines already express a strong commitment to relationships, and advisory bodies and community networks are in place. The next step is to build on these strengths by recognizing and managing the interdependency between strong relationship management and effective engagement and providing the needed oversight to optimize the symbiosis between these key functions. This means having a more clear and programmatic approach to relationship tracking and management that is directly tied to engagement.

What needs to happen?

The City's challenge isn't a lack of understanding of leading practice or a need to catch up with other jurisdictions. Calgary already has the right tools, people, and direction. What's missing is the bridge between intention and impact.

It starts with putting in place the right structural foundations to provide oversight and accountability for follow through on policy intent. From there, focused change in priority areas of Calgary's engagement approach can be implemented to drive measurable changes in results.

The recommendations in Table 1, are a unified package. Together they form a strategy for strengthening engagement by The City. If implemented, these actions are expected to result in The City having stronger oversight over its approach to engagement, supporting alignment to leading practices and helping to achieve its goals. Decision makers would be better supported in shaping and understanding Calgarians' expectations relative to specific choices, and in making decisions that are accountable to those who were engaged to provide input. Finally, Calgarians will have a much clearer understanding of what decisions they can influence, and how their input is used – driving higher numbers of those who express they feel they have a say in decisions, and ultimately higher levels of trust.

Table 1: Recommendations

Recommendations	Description
Recommendation 1: Structure and manage engagement as a function.	Engagement needs to be structured in a way that is fit-for purpose. The current structure – in which The City's engagement experts are treated as internal consultants but do not have authority over the quality of engagement practices - leaves important choices about whether to follow policy and leading practices in the hands of project managers who are often facing time and budgetary constraints. A central structure for engagement is needed to provide oversight,

Recommendations	Description
	measure and manage performance of engagement at a City-wide level, and assure quality and accountability. Key actions include: 1.1 Re-position the ERU to oversee engagement for The City. 1.2 Implement a more structured approach to portfolio management for engagement. 1.3 Strengthen performance measurement for engagement as a whole.
Recommendation 2: Strengthen controls to follow through on policy.	Process controls such as approval checkpoints are needed at key points of the engagement process. The ERU should be authorized to oversee these quality control measures, providing assurance that engagement plans and follow-up actions meet expectations and deliver consistent results. Key actions include: 2.1 Implement more stringent approval processes for Engage Assessments – which are the analyses completed when a decision is made to engage – to help ensure up-front scoping is complete and aligned with leading practice. 2.2 Implement stronger process controls to ensure engagement tactics and post-engagement. follow-up align with the scope described in approved Engage Assessments.
Recommendation 3: Consistently organize engagement around specific decisions and promises.	Every engagement should be based on one or more specific decisions that need to be made, and a promise about the level of influence the public will have in relation to those decisions. Processes and roles need to be clarified to make sure this practice is consistently and effectively followed. Key actions include: 3.1 Ensure every City engagement process is based on one or more specific decisions to be made, and a promise to those that will be engaged. 3.2 Clarify Council's role in setting and following through on promises.
Recommendation 4: Strengthen Interested Party analysis to support selection of engagement tactics.	Engagement tactics include identifying who is to be engaged, how, when, and about what; along with the marketing and communications activities needed. Tactics should be tailored to reflect what is already known about the perspectives, needs, and preferences of those that will be engaged. Strengthening the rigor of this process supports more strategic use of resources and reinforces public confidence by demonstrating that engagement is purposeful and thoughtfully designed. This includes the below key action. 4.1 Conduct analysis of those to be engaged immediately after Engage Assessments are complete.

Recommendations	Description
Recommendation 5: Manage relationships systematically.	Strong relationships lead to better engagement planning, higher-quality participation, and more meaningful insights for decision makers. A structured approach to relationship management, supported by tools such as a customer relationship management (CRM) system and clear accountability for maintaining these connections, is needed. Key actions include: 5.1 Define the role of standing structural entities like Advisory Committees in relation to engagement. 5.2 Proactively track and manage relationships. 5.3 Establish accountability for relationship oversight as part of the mandate of specific business units and/or roles.

Source: Prepared by KPMG.

Where to begin: Year 1

To build trust and drive meaningful change, The City needs a clear, actionable plan. Recommendations were assessed for **interdependence** (whether a step unlocks future progress or depends on other changes) and **complexity** (how challenging it is to implement).

Based on this analysis, the following phased approach is recommended for the first year. Council will need to determine the final approach, sequence, and timing with support from City staff, considering feasibility and budgetary factors.

Months 1 – 6: Building Readiness: Recommendations 1 and 2 are the most important to proceed with in the short term, even though they have complex elements. This will put in place the foundations needed to set up Recommendations 3, 4 and 5 for success.

Months 7 – 12: Building Momentum: Once foundational steps are underway, process improvements should proceed while other improvements continue. This includes continuing to implement Recommendations 1 and 2, while initiating actions under Recommendations 3, 4, and 5.

Months 13+: Building Impact: The remaining actions are recommended to be implemented after the first year, and should be timed such that key aspects of the foundation are in place to guide their delivery prior to proceeding.

What Is Public Engagement, And Why Does It Matter?

Public engagement means involving people in government decisions beyond what is required by law. Democratic governments must hold elections and often have mandatory processes such as public hearings. Engagement is different: it creates a way for the public to shape day-to-day decisions that affect them and navigate changes within a community - which can be complex and controversial.

Although engagement is just one of many factors that can inform decision-making, **good engagement makes decisions better** by helping leaders understand the needs of those they are trying to serve. In turn, better decisions lead to better results: services are more tailored to people's needs, more people benefit, and satisfaction is higher. **It also increases trust in government** by creating greater transparency and accountability on an ongoing basis, not just at election time. The goal isn't consensus: it's enabling officials to thoughtfully consider and balance a wide range of perspectives and interests.

What is "Public Engagement"?

This report centers on **public engagement**—the process of involving anyone who may be interested in or affected by a City decision. Public engagement goes beyond **Interested Party engagement**, which is limited to engaging only those individuals or groups with a direct stake in an issue.[1]

For the purposes of this report, "engagement" refers to inviting residents and interested parties to participate in and contribute to City decision-making. Unless otherwise specified, any reference to "engagement" throughout this report should be understood as "public engagement."

Colour Legend

- **Purple**: Key points for emphasis.
- **Pink**: These terms are defined Appendix A.

People who feel they have a say in decisions that impact them are more likely to trust government.[3] Almost 80 per cent of people that report trust in government feel this way.[4] When people do not trust governments to make good decisions in the public interest and operate ethically, the results can include instability, unrest, and even (in extreme cases) violence. Effective public engagement is critical to fostering a sense of agency and accountability among citizens, which leads to social stability, higher participation in democratic processes, stronger social cohesion, more resilience, and greater sense of community belonging for everyone.

Because of its importance, **public engagement has become a key function of all democratic governments and a well-defined area of professional practice, guided by a vast body of theory**. Organizations like the International Association for Public Participation (IAP2, established in 1990), Simon Fraser University's Morris J. Wosk Centre for Dialogue (established in 2000), and Bloomberg's Centre for Cities at Harvard University (established in 2021) promote **leading practices** built on decades of research and experience in public policy development. This doesn't mean there is only one right way to engage the public. Sometimes engagement means gathering feedback through surveys or public meetings; other times, it involves working closely with community groups or delegating aspects of decision-making. The key is to follow a process that is purposeful, proportional, and responsive to the needs of the community.

[3] Attitudes towards government can be shaped by many factors, including government competency, benevolence, and integrity. International Review of Administrative Sciences, 2017, Vol. 83(3), pp. 583–601. © The Author(s) 2015. Reprints and permissions: sagepub.co.uk/journalsPermissions.nav. DOI: 10.1177/0020852315585950. journals.sagepub.com/home/ras

[4] OECD, 2023. OECD Survey on Drivers of Trust in Public Institutions 2024 Results - Country Notes: Canada | OECD

Why a review, and why now?

The City of Calgary (The City) is widely viewed as a leading model in public engagement: its policies are considered by many other jurisdictions as the "gold standard".[5]

At the same time in 2024 The City's annual spring survey indicated **Calgarians' trust in government had fallen to an all-time low of 38 per cent**. The same survey in 2025 showed trust increased to 52 per cent, while recognizing there is still a lot of room for improvement.[6]

This is not just a trend observed in Calgary. In democracies around the world, trust in government is at an all time low. In 2023 only half of Canadians reported having high or moderately high trust in government. Other OECD nations fare worse, with only 40 per cent of citizens reporting trust in government on average.[7]

Although Calgary's policies and practices are often viewed as exemplary compared to peer jurisdictions, this distinction has not resulted in notably higher levels of public satisfaction.

In October 2024, Calgary City Council unanimously called for an independent third-party Review of The City's public engagement practices.[8] In February 2025 The City engaged KPMG **to identify strengths and opportunities** for improvement, **and develop actionable recommendations** to advance The City's processes in alignment with leading practices.

The *Strengthening Transparency: Improving Engagement with Calgarians* Review aims to support The City in **responding to Calgarians' expectations for accountable government that includes them more meaningfully in decision making**.

This Document

This report is primarily intended for Calgary City Council and City Administration – including the **Engage Resource Unit (ERU)** – to guide continuous improvement efforts.

It begins with a description of what "good" public engagement looks like, followed by a brief overview of The City's approach to engagement, the findings from the Review, and the corresponding recommendations. A framework to guide implementation is also included – offering a suggested approach for building momentum in the short term and tackling more significant changes in the longer term.

How the Review was Done

The Review used a structured, research-informed approach to delivery findings that are evidence-based and objective. Key aspects of this process are outlined below.

Benchmark Design

A benchmark is a standard or criterion that can be used to measure effectiveness, generally based on what is considered normal, acceptable, or leading practice within a sector.

KPMG developed 20 benchmarks to evaluate The City's approach to public engagement. These benchmarks were identified through a literature review of leading engagement practices – including principles of excellent public engagement – and interviews with experts and jurisdictions recognized for their innovative and leading approaches.

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[5] Multiple jurisdictions invited to provide input to this Review declined to participate, indicating they did not feel they had anything they could teach Calgary.
[6] City of Calgary, 2025. [Calgarians show increased trust & optimism in spring research results]
[7] OECD, 2023. [OECD Survey on Drivers of Trust in Public Institutions 2024 Results - Country Notes: Canada | OECD]
[8] Notice of Motion Strengthening Transparency: Improving Engagement with Calgarians. Report No. EC2024-1130. Executive Committee Meeting, 2024 October 02, pp. 1-2. ISC: UNRESTRICTED

Preparing to Assess

A review framework was designed to guide a systematic approach for evaluating The City's public engagement practices in relation to the benchmarks. This included identifying assessment criteria for each benchmark, and a maturity scale to guide consistent interpretation of findings across all benchmarks.

Assessment

Three strategies were used to assess The City's engagement approach in relation to the benchmarks.

- **Document review:** To assess policies and standard operating procedures relative to leading practices, over 60 documents were reviewed, including past reviews, policies, frameworks, operational tools, onboarding resources, and organizational charts. More details on documents reviewed are included in Appendix B.
- **Case studies:** To assess how well The City's policies and procedures are being put into practice, a review of all available documents from five previous public engagements was completed. These case studies were chosen to reflect a range of project sizes and approaches. For example, the South Shaganappi Communities Local Area Plan and the Drought Resilience Plan were large, multi-year efforts with many groups involved, while the Secondary Suite Registration Engagement and Liquor in Parks initiative were smaller, single-phase projects mainly using public surveys. In addition, the "Local Area Planning Engagement Process Audit" (LAP Audit), conducted by the Calgary City Auditor's Office in May 2025, was used to further understand practices in relation to policy.

Case studies reviewed:

- South Shaganappi Communities Local Area Plan (2025)
- Drought Resilience Plan (2023)
- Foothills Land Annexation (2023)
- Secondary Suite Registration Feedback (2023)
- Liquor in Parks (2019)

For more details on each of the case studies, refer to Appendix C.

- **Interested Party engagement:** Key audiences were engaged to help validate and expand findings from the Document Review and Case Studies. This included:
  - Interviews with the Mayor and Council members to confirm key context regarding Calgary's approach to engagement from the perspective of decision makers.
  - Focus groups with City staff – including senior leaders, operational staff, and engagement (ERU) staff – to gain insight regarding how engagement works in practice, including the extent to which policies and procedures are followed and are considered effective.
  - A city-wide digital survey, in-person sessions (open to the public, with two sessions per ward), and focus groups with Community Associations were held to gain insight on the public's perspective on challenges with The City's engagement current approach to engagement.
  - A working group composed of 11 Calgarians met 5 times to explore how leading practices and changes in approach might strengthen public engagement in Calgary.

Additional details regarding the Interested Parties engaged and the methods of engagement used can be found in Appendix D.

Synthesis and Identification of Findings

Strategic analysis was completed to identify what issues appear to be having the greatest impact on The City's performance across all 20 benchmarks, and to consider where potential changes or investments were likely to have the most meaningful impact on overall results. Figure 2 provides a visual representation of the approach used to move from benchmarks to strategic analysis to findings.

Figure 2: Synthesis Approach

Source: Prepared by KPMG.

Ensuring independence

At the outset of the Review, to promote independence and an objective process, the roles of KPMG and The City were clearly delineated. KPMG was mandated to identify evidence-based benchmarks, evaluate The City's approach to public engagement against these benchmarks, and report on progress and findings. The City's role included:

- Posting information provided by KPMG on The City's website – such as the link to the survey and information about engagement opportunities.
- Providing access to documents, individuals, meeting venues, and other resources as needed to enable the Review; Facilitated reporting channels between KPMG and Calgary City Council (Council); and
- Advising KPMG of any changes in direction or requirements identified by Council to help ensure responsiveness to Calgarians during the Review.

Review Limitations

Please note the following limitations of this Review.

- Insights into engagement practices were based in part on a sample of five case studies, which may not fully represent all practices or variations across The City's diverse engagement activities.
- Public engagement practices and policies are continually evolving. The Review reflects the status of practices at the time documents and data were collected and may not capture recent or ongoing changes implemented after the Review period.

What Is "Good" Public Engagement?

In order to assess The City's engagement practices, it was necessary to begin with a clear understanding of what standards The City should be measured against.

There are many possible ways to define "good" public engagement, as evidenced by many public engagement frameworks available through different policy and academic institutes – a large number of which formed part of this Review. One way is through the identification of benchmarks, such as the ones used in this Review and included in Appendix E.

At a high level, good public engagement has three main elements (see Figure 3): a **clear strategy** with a defined scope, **appropriate tactics** to execute the strategy, and **accountable follow up** after engagement has taken place. It is also supported by **organizational capacity**, which entails the right resources, expertise, and organizational controls to enable effective, efficient, accountable functioning.

Figure 3: Elements of Good Public Engagement

Source: Prepared by KPMG.

Clear Strategy

Good public engagement starts with developing a clear overarching strategy that identifies:

- A **specific decision** to be made by a **specific decision maker**, and goals of engagement in relation to the decision clearly stating what information is needed to support the decision maker.
- A clear **promise** to the public about how their input will be used, and by whom. This promise should be understood and taken seriously by all those involved in the engagement process and subsequent decisions.

IAP2 has a widely used public participation spectrum that defines five possible promises to the public (see Figure 4).[9]

[9] © Federation of International Association for Public Participation 2024. All rights reserved. This work was created with contributions from Lewis Michaelson, Martha Rozelle, and Doug Sarno. www.iap2.org. It should be noted this spectrum is currently being revised to reflect that "inform" is not a type of engagement but rather occurs across the spectrum.

The promise should be informed by the availability of resources: tactics that enable the right side of the spectrum tend to be more costly and time consuming. It should also reflect the extent to which those who are engaged are expected to be part of implementing what is decided. For example, decisions about a program that will be delivered collaboratively in partnership with community organizations should generally promise greater influence to these organizations than The City can deliver on its own.

This sets the **scope of engagement**: all activities carried out under the strategy must directly contribute to the goal of providing the identified decision maker with needed information to assist them with the identified decision, in alignment with the **level of influence** that will be promised to those who are engaged.

Figure 4: IAP2 Spectrum of Public Participation

IAP2 Spectrum of Public Participation

iap2 International association for 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.

INCREASING IMPACT ON THE DECISION

	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.

Source: IAP2

Appropriate Tactics

Good public engagement uses tactics that flow directly from the clear strategy described above, following the principle of "form follows function", meaning the way engagement is carried out should fit the purpose and objectives of the project, rather than using a one-size-fits-all approach. Choice of tactics determines the extent to which the goals of engagement will be achieved by shaping who can participate, how input can be provided, and what will be shared with decision makers. Tactics should:

- Align with the **level of influence** promised to the public. For example, generative workshops are best suited to the right side of the IAP2 spectrum (Figure 4), while online surveys are best suited to the left side of the spectrum.

The choice of tactics is an important cue to those being engaged about their role in making the decision. Using improper tactics can send the wrong message about how feedback will be used. For example, a tactic such as a citizens' jury would likely create expectations of influence beyond the "consult" and "involve" levels in the IAP2 spectrum.

Choosing improper tactics can also be ineffective in achieving the desired level of public involvement. For example, if the desire is to empower citizens, a tactic such as an electronic survey (no matter how cleverly designed) is likely insufficient to achieve the intended level of involvement.

- Demonstrate understanding of those who will be engaged – including their past comments on related topics, and how they prefer to be engaged. This provides important cues to those being engaged that they are respected and valued, and helps make sure resources devoted to engagement are not wasted unearthing information that has already been provided to The City or can easily be accessed through research.

Accountable Follow up

Good public engagement makes use of the input collected, and closes the loop with those who were engaged to let them know:

- How their feedback was heard and communicated. This gives confidence to those who were engaged that they were understood accurately, and creates transparency in what content will be provided to decision makers.
- How their feedback was used. This assures to those who were engaged that the promise made to them was kept, and helps create transparency and accountability regarding the rationale for resultant decisions.

Organizational Capacity

Public engagement is always subject to limits on time, budget, and staffing. That's why it's important that public engagement activities are planned intentionally, with effective use of resources so that engagement can always be accountable and transparent – as all government activities must. Good engagement:

- Makes intentional, criteria-based decisions about where to invest engagement resources. Choices must be made regarding which decisions merit engagement, how much engagement, and at what level of influence. One engagement process may receive only enough funding for a brief online survey, while another may receive enough for a city-wide, multi-faceted process over many months. One engagement process may strive to include a small group of those most impacted, or whose views are least understood; another process may strive to include everyone. These decisions should not be arbitrary: clear criteria should be applied in a disciplined way to guide what scale of engagement is needed, and what level of influence is appropriate.
- Uses expertise on engagement and operational topics in balance. Engagement expertise should guide the process, while operational expertise should guide the content of the process and how to apply its outputs.
- It is intentional, making sure that the right approvals, controls, protocols, and process are applied.
- Regularly undergoes continuous quality improvement in response to performance measurement, and new thought leadership.

Calgary's Approach to Engagement

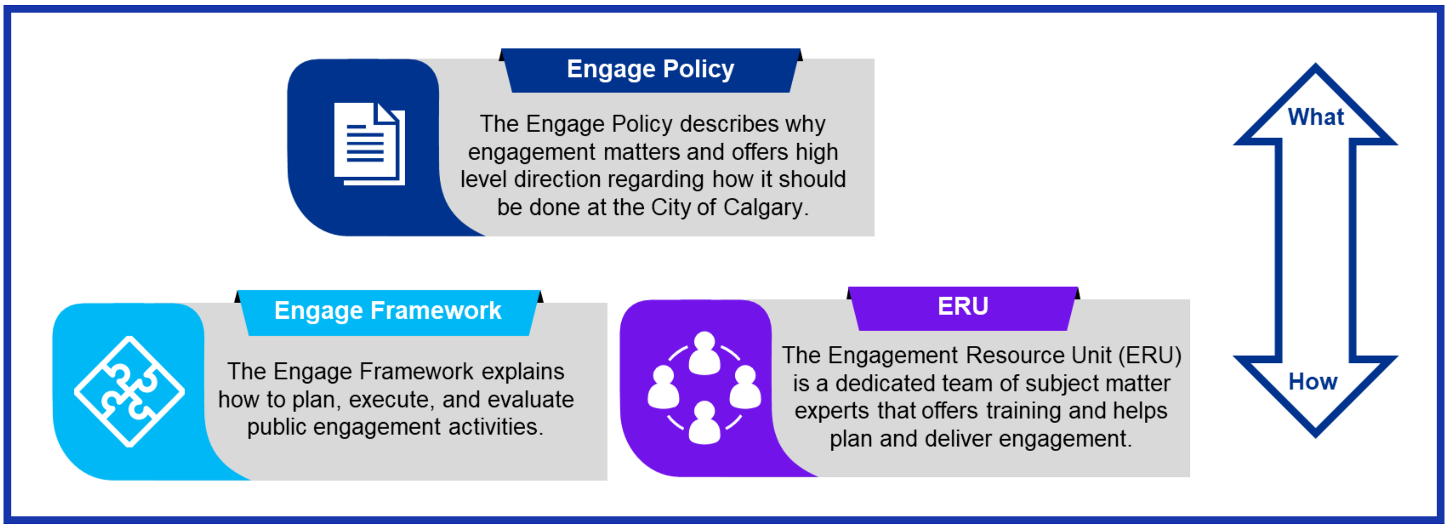
This section provides a description of The City's current engagement model as context for findings, recommendations, and implementation considerations presented later in the Report.

Engagement Model Overview

The City defines engagement as *"purposeful dialogue between The City, impacted or interested Calgarians and other communities or groups to gather information to influence decision-making."* [10]

Three core structures guide engagement at The City, as shown in Figure 5. These structures include the **Engage Policy**, which sets the direction for engagement; the **Engage Framework**, which provides specific details regarding how engagement should be done within the parameters of the policy; and the Engage Resource Unit (ERU), which is an internal division staffed by engagement experts from The City to guide engagement activities in alignment with the policy and framework. The Engage Policy provides high level principles to guide engagement across The City, while the Engage Framework and ERU are resources to support implementation of the policy.

Figure 5: City of Calgary Enabling Elements to Engagement



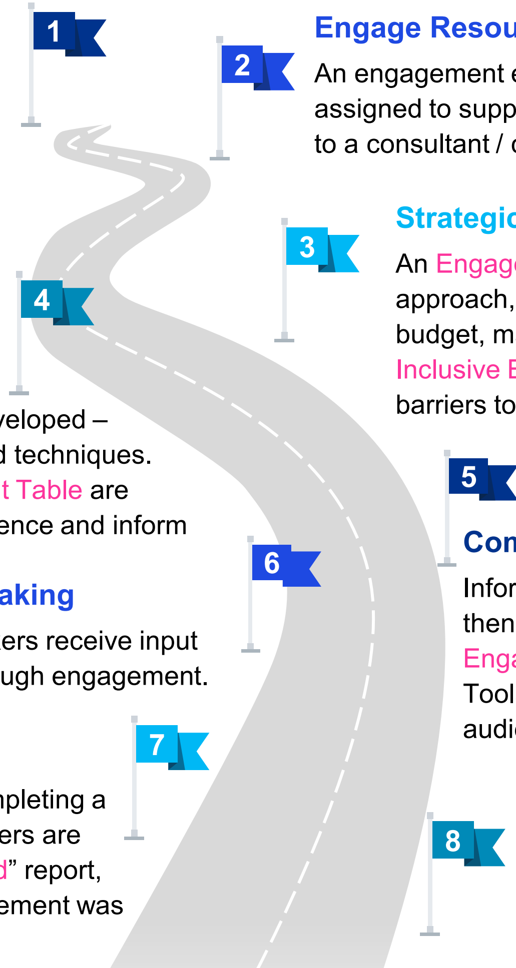
Source: Prepared by KPMG.

How Public Engagement Is Intended to Work

The City's engagement process intends to follow a structured sequence, supported by dedicated tools and resources. Figure 6 on the following page provides an overview this process.

[10] City of Calgary Engage Policy

Figure 6: How Engagement at The City is Intended to Work



Defining the Promise

The purpose of the engagement and the promise to the public must be clarified at the start using a Spectrum of Strategies and Promises.

A brief Engage Assessment Form helps identify which decisions are open to input and proposed project scope.

Engage Resource Unit

An engagement expert (Engage Lead) can be assigned to support the Project Manager – similar to a consultant / client relationship.

Strategic Planning

An Engage Strategy outlines the approach, key activities, and a preliminary budget, making use of tools like the Inclusive Engagement Guide to address barriers to equitable participation.

Tactical Planning

An Engagement Plan should then be developed – a detailed tactical plan outlining tools and techniques. Resources such as a Detailed Participant Table are available to help teams analyze the audience and inform planning choices.

Communication with the Public

Information about the process can then be shared with the public on the Engage Portal and other channels. Tools are available to guide clear, audience-focused materials.

Decision Making

Decision makers receive input gathered through engagement.

Closing the loop with Calgarians

The Engage Lead is responsible for completing a "What We Heard" report. Project Managers are encouraged to complete a "What We Did" report, focused on how information from engagement was used to make decisions.

Debriefing

Post-engagement learning is encouraged.

Source: Prepared by KPMG.

The Spectrum of Strategies and Promises identifies four possible promises:

- **Listen & Learn**: The City promises to listen and learn about the public's plans, views, issues, concerns, expectations and ideas.
- **Consult**: The City promises to consult the public and consider and incorporate their feedback to the maximum extent possible, and to report back to the public on how consultation impacted the decisions and outcomes.
- **Collaborate**: The City promises to partner with participants in a process that results in joint recommendations, and report back on how collaboration impacted decision-making.
- **Empower**: The City promises to abide by the decisions made by those engaged to the extent that legislation permits.

Review Findings

Identification of Review findings began with analysis of The City's approach in relation to 20 benchmarks. **Detailed benchmarking identified many opportunities for operational fine tuning –** including areas where The City is already a leader. These are outlined in Appendix E.

However, **fine tuning is unlikely to translate into measurable improvements in performance or results –** such as significantly improved trust. Strategic analysis was undertaken to identify what issues appear to be having the greatest impact on The City's performance across all benchmarks, and to consider where potential changes or investments are likely to have the most meaningful impact on overall results.

This analysis revealed that **in most cases, The City already has the right policies and operational tools in place**. The City's model is well aligned with leading practice and is considered a leader by other jurisdictions.

However, **these policies and tools are not being used correctly or consistently**. There is limited oversight and accountability for carrying out engagement in accordance with policy, and for achieving the desired results of good engagement.

Even though the same groups are frequently approached to participate in or help deliver engagement, **there is no programmatic way at The City of tracking or managing key relationships, coordinating the timing of engagement processes, or leveraging insight about key groups** to make engagement more meaningful and respectful.

There is a need to put in place the right structural foundations at the organizational level to ensure effective oversight of engagement, to make sure critical practices are always followed, and to manage relationships more strategically. These findings, described below, form the foundation for the recommendations that follow in the next section.

Finding 1: The City's policies and operational tools are – overall – well-aligned with leading practice.

As described earlier, good engagement includes clear strategy, appropriate tactics, and accountable follow up (it also includes organizational capacity, which is addressed under Finding 2). Benchmarking indicates The City's current engagement policy and operational tools – which collectively reflect The City's intended approach for engagement – are strongly grounded in leading practice. Table 2 identifies specific aspects of The City's policies and procedures that demonstrate this finding.

Table 2: Findings Related to Clear Strategy and Appropriate Tactics

Element of Good Engagement		Calgary's Approach
Clear Strategy	– Engagement is tied to specific decisions open to public input. – A clear promise is made to the public regarding how their input will be used.	– The Engage Policy and Engage Framework state the purpose of engagement is to inform decisions, and indicate staff are expected to articulate the decisions being considered and specify the level of public influence. – The Engage Assessment Form prompts Project Managers to identify specific decisions that are open to input as the starting point for engagement planning.
Appropriate Tactics	– Tactics align with the promise made to the public about how their input will be used. – Tactical planning demonstrates	– Standardized templates, including the Engage Strategy Template, Engagement Plan Template, and Detailed Participant Table help analyze Interested Parties and their needs. The Inclusive Engagement Guide is intended to help support selection of tactics tailored to participant needs.

Element of Good Engagement		Calgary's Approach
	understanding of who will be engaged.	– The Engagement Plan template and Detailed Participant Table template include fields for the decision and the promise to be entered, which reinforces focus on these elements during the tactical planning stage. – The Detailed Participant Table provides a platform for detailed analysis of Interested Party needs, interests, preferences, and background knowledge. – The Engage Framework emphasizes planners should make choices about scale and tactics based on project and Interested Party needs.
Accountable Follow up	– The input that was collected is used. – Follow up occurs with those who were engaged to let them know how their input was understood, and how it was used.	– The Engage Policy, Engagement Framework, Content Outline, and Engagement Report Back templates set direction for closing the loop with the public regarding what was heard, how input influenced decisions, and when decisions were or will be made. – Standardized templates including "What We Heard" and "What We Did" reports are intended to provide structure for documenting outcomes and linking decisions to public input.

Finding 2: Limited oversight allows gaps between policy and practice to exist and persist.

In contrast to Finding 1, benchmarking indicates The City's engagement practices are frequently misaligned with its well-regarded policies and procedures, limiting its ability to convert its leading resources into leading results such as higher trust levels. There is a pronounced need for stronger oversight of engagement, leading to alignment of practice with policy and accountability for its results.

Gaps in practice

There are three priority areas in which focused attention is needed to drive improvement throughout The City's engagement practices: defining clear and specific decisions, making and keeping promises to the public regarding their role in decisions, and choosing fit-for-purpose tactics.

Defining clear and specific decisions as the starting point for engagement

Although The City's policies and procedures indicate the purpose of engagement is to gather input to inform decisions, and assert the need to define a clear decision open to public input as the first step in the process of planning for engagement, decisions are not clearly defined in practice. Some projects frame their purpose around broad topics rather than concrete decisions. Planning tools from one case study stated, in lieu of a decision, that its intent was to "explore public opinion," while another aimed to hear from Interested Parties about issues and challenges. These objectives, though well-intentioned, are too general to support effective engagement planning and appropriate tactics. When a topic is too broad, it is very challenging for members of the public to see how their feedback informed related decisions.

Leading practice in the IAP2 model of engagement is to go beyond identifying a general topic of interest of engagement, and identify what choices will be made with engagement feedback – as well as who will make them. Table 3 offers examples to show the difference between a well-defined decision in contrast with topics or general tasks that may be related but are not suitable as the focus for engagement planning.

Table 3: Broad vs. Specific Decisions

Broad – Not suitable for engagement planning	**Detailed and specific –** Suitable for engagement planning
– What do people think about bike lanes? – What should be included in a strategy for bike lanes? – How could bike lanes be better? – What could encourage more people to use bike lanes? – Why don't more people use bike lanes?	– What objectives will guide the development of new bike lanes over the next five years? – What actions will The City pursue to increase uptake of bike lanes? – Will a bike lane be added on Mulberry Street? If so, what measures will be taken to minimize inconvenience to local residents and businesses during construction? – Which bike lanes will be separated from the road by a physical barrier or painted lines?

Source: Prepared by KPMG.

Defining the level of influence the public will have on a given decision

City policy and procedures indicates that after a decision has been identified as the basis for engagement planning, what level of influence the public will have on this decision must be determined. The Engage Policy sets out four possible levels of influence with corresponding promises to the public.

In practice, few planning documents included in this Review – such as Engage Strategies or Engagement Plans – explicitly identified the promised level of influence using terms from the Engage Policy, such as "listen and learn." Even when promises were stated, details about how they would be fulfilled were often missing.

Clear communication regarding what decisions will be made, who will make them, and the role of public input can foster transparency and help members of the public determine whether, how, and when to share their perspective. This is associated with higher levels of participation and higher levels of satisfaction with engagement processes.

This is more than a theoretical ideal: misaligned expectations about what decisions will be made and how the public can influence them leads to higher frustration and lower trust. The Review found examples though Ward Session Engagement where Calgarians expected to influence a particular decision, only to later discover their role was limited – creating dissatisfaction with results. Furthermore, two-thirds (64%) of respondents to this Review's survey on engagement indicated The City is unclear about what decisions will be made and how their feedback will be used.

Choosing fit-for-purpose tactics that optimize resources

Engagement tactics should be aligned with the promise, helping to make sure that implicit and explicit messaging to the public about their role in making decisions at hand are clear, intentional, and consistent. Tactics should also be based on analysis of those to be engaged; including what input has already been provided, possible barriers to participation, and preferences.

While policy direction and high-quality internal resources encourage The City's staff to carry out meaningful analysis of those to be engaged as a precursor to choosing engagement tactics, this does not appear to be occurring consistently or in a systematic way.

The rationale for tactics used for some of the case studies included in this Review was unclear. Analysis indicates tactics are most likely chosen based on project budget rather than an effort to optimize tactics in relation to project goals and audience: smaller budget engagements used low-cost tactics such as surveys, while larger-budget projects deployed a wide range of tactics – such as surveys, townhalls, focus groups – in as many formats and languages as possible.

Selection of tactics demonstrated a well-intended desire to reach as many Calgarians as possible within budget. However, "all inclusive" approaches are not leading practice, tending to be generic and creating mixed messages regarding the purpose and promise of the process.

The scale and types of tactics should be fit for purpose, with controls applied to help make sure that the available resources are optimized in relation to the goals of a given engagement process: sending clear, cohesive messages, and helping ensure those engaged are left with a sense their perspective and time are valued.

The need for oversight

Organizational capacity is a critical element of supporting the elements of good engagement, as described in the section titled "What Is "Good" Public Engagement?". This includes effective oversight such as maintaining a well-functioning and accountable framework of controls to ensure quality and performance: making sure policies are followed and expected results are met, and leading continuous improvement when needed.

Some important elements of organizational capacity are present. As described earlier in this report, The City has strong internal expertise through the ERU, and a robust policy framework.

However, engagement at The City is not currently overseen by any specific group or individual. The ERU functions like an internal consultancy, providing services "on demand" to clients, with the clients setting direction and retaining decision making authority throughout the entirety of an engagement process. As a result, adherence to policy and leading practice are largely optional.

Moreover, portfolio and program management do not occur: engagement is managed on a project-by-project basis. There is not currently a way to monitor how many engagements are taking place simultaneously in the same areas of The City and / or with the same groups of people. Senior leaders in The City are not briefed on forecasted engagements or involved in putting in place plans that help ensure the volume and pace of engagement – and associated communications – are respectful and feasible from the perspectives of those who will be engaged.

On a related note, while project-level evaluations are carried out to some extent in the form of guided debriefs, there is currently no performance measurement system in place to provide assurance to Council or Calgarians that the desired outcomes of engagement are being achieved; such as making sure Calgarians feel like they have a say in decisions, keeping confidence in The City high, and improving services based on citizen needs. Performance indicators are not tracked and reported, and continuous improvement is ad hoc.

When combined with the findings above regarding inconsistent policy implementation, it is clear that stronger oversight is needed.

Finding 3: Relationship management is an overlooked but potent lever to drive better engagement.

Good relationships and good engagement are interdependent. Strong relationships lead to better engagement, which in turn leads to higher trust and fosters stronger relationships.

The City has made meaningful and successful efforts to build relationships with key groups and people, and the review observed a number of instances where strong, positive relationships supported better engagement. In addition, formal structures like the Calgary Aboriginal Urban Affairs Committee (CAUAC), Calgary Local Immigrant Partnership (CLIP), Indigenous Relations Office (IRO), and the Advisory Committee on Accessibility provide avenues for collaboration and trust-building with key groups, such as Indigenous peoples, newcomers, and people with disabilities. These efforts have been informed by strategic and policy direction from sources such as the Social Well-being Policy and Inclusive Engagement Guide that serve to embed principles of equity, truth, and reconciliation into engagement processes.

Currently, the dependency between these relationships and engagement is not formally recognized or proactively managed. Relationships are often maintained by particular staff or business units in isolation, or informally. They are not systematically leveraged to gain insights to inform engagement planning, or to guide continuous improvement of The City's engagement approach. When staff change roles or leave the organization, continuity and accumulated trust can be lost. Without a record of contacts, insights and past promises, it can be challenging to build on what is already known about these groups and people. As a result, valuable insight about Interested Parties may not always be fully utilized, and opportunities to build trust can be missed.

Calgarians engaged through this Review indicated that having strong ongoing relationships makes it easier to identify who needs to be involved in decisions. It positions The City to understand Interested Parties' perspectives, preferred engagement tactics, and cultural protocols. It also enables more reliable and accountable follow-up with communities.

The City's policy framework already expresses a strong commitment to relationships, and advisory bodies and community networks are in place. Staff can point to positive examples of instances in which leveraging such networks resulted in better engagement results; such as the experience of intensive engagements focused on Chinatown, which were brokered though community contacts and leaders.

The next step is to build on these strengths by recognizing the dependency between strong relationship management and effective engagement, and providing the needed oversight to optimize the symbiosis between these key functions.

Recommendations

Overview

The City of Calgary has made a purposeful commitment to engage with the public in a meaningful way. Through the Engage Policy, Engage Framework, a suite of supporting resources, and substantial in-house expertise, The City has established a foundation recognized across Canada. Many other jurisdictions look to Calgary as a leader and a model for how to structure and deliver effective public engagement. Residents also recognize The City's consistent efforts to engage, and these strengths matter, as they show that Calgary is serious about public engagement.

However, many Calgarians still report feeling unheard, uncertain about how decisions are made, and unclear whether their input truly matters. Only 16 per cent of respondents to a survey conducted through this Review expressed confidence that their perspectives are being considered in decisions. While The City offers many opportunities to engage, the connection between providing feedback and influencing decisions is not always visible.

The City's challenge isn't a lack of understanding of leading practice or a need to catch up with other jurisdictions. Calgary already has the right tools, people, and direction. **What's missing is the bridge between intention and impact.**

It starts with putting in place the right structures to provide oversight and accountability for follow through on policy intent. From there, **focused change in priority areas** of Calgary's engagement approach can be implemented to drive measurable change in results.

The recommendations that follow () are presented as a unified package. Together they form a strategy for strengthening engagement at The City. If implemented, these actions are expected to result in The City having stronger oversight over its approach to engagement, supporting alignment to leading practices and helping to achieve its goals. Decision makers would be better supported in shaping and understanding Calgarians' expectations relative to specific choices, and in making decisions that are accountable to those who were engaged to provide input. Finally, Calgarians will have a much clearer understanding of what decisions they can influence, and how their input is used – driving higher numbers of those who express they feel they have a say in decisions, and ultimately higher levels of trust.

Recommendations

1	Structure and manage engagement as a **function.**	**1.1 Re-position the ERU to oversee engagement** 1.1.1 Develop a business plan and performance approach 1.1.2 Create a change management strategy	**1.2 Manage engagement as a portfolio** 1.2.1 Sequence engagements 1.2.2 Quarterly dashboard to leadership	**1.3 Enhance performance measurement** 1.3.1 Define KPIs for engagement 1.3.2 Develop reporting approach

Engagement is a key function of modern democracies and needs to be structured in a way that is fit-for purpose. The current structure of the ERU as an internal consultancy limits its value by over-emphasizing its role in supporting individual engagement projects and leaving important choices about whether and how to follow policy and leading practices in the hands of the ERU's "clients". To strengthen consistency and accountability, the ERU should evolve from a primarily supportive function to one with a moderate level of control - able to uphold processes and adherence to standards - while stopping short of becoming a directive function that manages engagement activities entirely. This central structure for engagement is needed to provide oversight, measure and manage performance of engagement at a City level, and assure quality and accountability.

Actions:

1.1 Re-position the ERU to oversee engagement for The City.

Transition the ERU from its current role as an internal consultancy to a business unit mandated to oversee engagement as a core organizational function. The ERU should support teams through systems and processes that enable compliance with City policies, rather than simply project support. This shift will help ensure engagement is managed consistently across the organization, with the ERU responsible for oversight, quality control, and alignment with leading practices - similar to the role of Communications in managing external messaging. All engagement activities, including those contracted to third parties, should be approved by the ERU, which will have authority to implement controls and ensure city-wide compliance with engagement standards.

Specific actions include:

1.1.1 Develop a business plan outlining how new responsibilities that are not already part of the ERU's work will be organized and staffed. This business plan will specify how organizational changes (form) are designed to deliver their intended results (function): strong oversight and accountability for engagement. It should delineate results expected from the new structure with a corresponding performance evaluation approach. New responsibilities should include:

- Portfolio management and sequencing to help manage the volume of engagement happening at any one time, especially when the same Interested Parties are impacted, as described under action 1.2.
- Developing and implementing a performance management approach, as described under action 1.3.

1.1.2: Identify resource, staffing, and workflow changes needed to implement the envisioned structure, and develop a change management strategy to guide implementation of changes within a one-year timeframe.

1.2 Implement a more structured approach to portfolio management for engagement.

Many individual engagement projects are ongoing at any one time and may include the same Interested Parties and/or decision makers. Interested Parties expect The City to have an overarching understanding of all its engagement work, and to coordinate engagement – including communication about engagement – in a way that supports Calgarians to digest information and make informed decisions about when and how to share their feedback. A more intentional approach to sequencing, tracking, aligning, and reporting on engagement is needed.

Specific actions include:

1.2.1: The decision to approve Engage Assessments should consider other engagements approved for the same timeframe and/or that includes the same Interested Parties. Intentional choices should be made to manage the sequence of engagements to manage impacts on internal resources as well as to prevent engagement fatigue or over-engagement among Calgarians. The ERU should support and effectively involve the Executive Leadership Team (ELT) in engagement oversight, including providing regular briefings and dashboards on the overall volume, sequence, and timing of engagement across the City. ELT has a critical role to play in understanding what engagement is happening, setting broad direction, and liaising with Council to involve them in decisions about engagement in a timely way.

1.2.2: A quarterly dashboard of engagements should be submitted to ELT, by the ERU, to inform allocation of resources based on risk and needs, support consistency in outreach and marketing, and development of relationships.

1.3 Strengthen performance measurement for engagement as a whole.

The ERU has a strong commitment to continuous quality improvement and innovation. Currently most quality improvement and innovation takes place in an ad hoc way, and evaluation focuses on individual engagement projects rather than the function of engagement as a whole for The City. While project-level debriefs are a good practice that should continue, it is important to implement a disciplined approach to regularly measuring and improving performance at a programmatic level.

Specific actions include:

1.3.1: Define performance measures, including key performance indicators, for engagement, focusing programmatically on all engagement rather than on engagement projects. This work should focus on defining what results would be expected if The City's engagement approach is following leading practice and achieving high performance, based on a research-informed theory of change.

1.3.2: Develop a performance measurement and reporting approach that includes elements related to the engagement process, participant feedback, the impact of engagement on decisions, and impacts on measures like trust. This should include:

- What data needs to be collected from engagement projects to inform measurement, how and when?
- What other data is needed? How will this be collected?
- How will data be analyzed, and by whom?
- How often and to whom will results be reported?

How will results inform changes to engagement policy and procedure? What accountability structures are needed to ensure follow up?It is too easy to view practices in the Engage Policy and related tools as a "nice to have" amid resource-

2	Strengthen **controls** to follow through on policy.	**2.1 Stringent approvals for Engage Assessments** 2.1.1 Require decision-maker and ERU sign-off of Engage Assessments	**2.2 Implement stronger process controls to align tactics and follow-up with scope** 2.2.1 Update templates for alignment with decisions and promises 2.2.2 Standardize mandatory "What We Did" reporting 2.2.3 Give ERU authority as stage gate

constrained tactical planning and delivery. Bridging the gap between policy and practice requires more than adding or strengthening templates: it calls for structures and roles that reinforce accountability and ensure consistency. Calgarians are unaware of the budget for engagement, and which processes are delivered internally as opposed to outsourced: they expect a consistent standard of delivery every time.

Effective **stage gates** and quality controls are needed to make sure choices throughout the engagement process align with and actualize the engagement approach The City is widely celebrated for, and ultimately this will translate into higher public trust.

This is complex work: effective local government is never about imposing rigid, inflexible, absolutes. Evolving issues, diverse requirements, and limited resources create the need for strategic and critical thinking day to day. This is sometimes more art than science, requiring judgment, adaptability, and a willingness to learn by doing. There is no perfect, one-size-fits-all solution that can be implemented to solve all problems; instead, success depends on building systems that deploy controls intelligently, effectively, and accountably with a clear line of sight to desired results.

The stage gates recommended here recognize that indiscriminate use of controls creates unhelpful red tape and leads to bottlenecks; thus, the controls recommended strike a needed balance by implementing stage gates strategically, addressing real issues where a lack of control has impacted results.

Actions:

2.1: Implement more stringent approval processes for Engage Assessments.

The decision to engage is a pivotal moment in the lifecycle of an engagement process, creating a critical opportunity to ensure the foundational elements of the Engage Strategy (a specific decision and related promise) are in place to set up the rest of the process for success. Without this up-front foundation, the results of engagement are very much left up to chance.

Specific actions include:

2.1.1: The initial assessment of whether to engage should include involvement of the decision maker in confirming their commitment to the promise described in Engage Assessments (see also action 3.1.1), and sign-off by the ERU indicating the Engage Assessment meets expectations and provides a strong foundation for tactical planning and accountable follow up. Assessments that do not meet expectations should not be approved. The ERU requires authority to act as a stage gate in the engagement assessment process, providing assurance that all engagement aligns with City policy.

2.2: Implement stronger process controls to ensure engagement tactics and post-engagement follow-up align with the scope described in approved Engage Assessments.

Once an Engage Assessment is complete, controls are needed to ensure follow through and alignment.

Specific actions include:

2.2.1: Update engagement planning, delivery guides and tools including but not limited to: the Engage Strategy, Engage Plan, Engage Portal and associated communication materials, and What we Heard templates to prompt project teams to ground all their work in, and demonstrate alignment with, the decision(s) and promise included in the approved Engage Assessment.

2.2.2: Make "What we Did" reporting a standard part of the post-engagement process. Reporting should be used to close the loop with participants by clearly demonstrating how The City has fulfilled promises made during engagement by taking public feedback into account to make specific decisions. It is suggested "What we Did" reporting is sent directly to those who participated in engagement to the maximum possible extent, rather than posting them online where people may or may not find them.

This change may be best enabled by more explicitly and intentionally managing the process of decision making as interdependent with engagement. The City's engagement process map does not currently include a decision point or actions following this, such as reporting back to the public about the decision. While management of decisions should not be overseen by the ERU, integrated process oversight is essential for the ERU's success in accountable follow up. The current approach, – in which the Project Manager takes sole responsibility for all actions that occur after engagement is complete, and has discretion on whether and how to close the loop with Calgarians – creates significant risk to this critical aspect of accountable follow up.

2.2.3: The ERU requires authority to act as a stage gate in the engagement planning process, providing assurance that all engagement tactics align with the decision(s) and promise included in the approved Engage Assessment, and that follow up with those who were engaged provides accountability for follow through on the promise. Check points and approval processes need to be clarified and/or established. The following provides a starting point:

- **Tool / template completion:** Approve all templates and tools to confirm engagement tactics are aligned with the decision and promise in the approved Engage assessment.
- **External communications:** The ERU and Communications teams should jointly approve all engagement-related communications - including marketing, engagement and follow-up reporting materials. This collaboration leverages their respective expertise in creating messages that encourage participation and emphasizes the decisions to be made and the promise to the public.

3	Consistently organize engagement around **specific decisions and promises.**	**3.1 Ensure engagements are based on specific decisions and promises** 3.1.1 Shift to detailed Engage Assessment Reports	**3.2 Clarify Council's role in setting and honoring promises** 3.2.1 Systematically involve Council in high-impact engagements 3.2.2 Establish workflows for Council direction-setting and coordinated engagement planning

Specific decisions that will serve as the focal point for engagement, and the level of influence that will be promised to those who are engaged, need to be clear before tactical engagement planning begins.

This should not be treated as a housekeeping exercise: quality controls are needed to make sure decisions reflect real choices The City needs to make and demonstrate true commitment to keeping promises – including from decision makers. Controls are also needed throughout the engagement process to ensure tactical alignment and accountable follow through. These are addressed under Recommendation 2.

Actions:

3.1 Ensure every City engagement process is based on one or more specific decisions to be made, and a promise to those that will be engaged.

The City's policy and procedural documents already recognize the importance of grounding engagement in specific decisions and a promise to those who will be engaged. What is needed is follow through on these intentions. This means implementing stronger quality controls and stage gates as part of The City's approach for approving all engagement. Greater investment is needed up front to help ensure a strong foundation for quality control throughout the engagement lifecycle.

Specific needs are as follows:

3.1.1: Shift from using a brief Engage Assessment Form as the first step in the engagement process to using a templated report with headings – similar to the form currently used for Engagement Strategies. This encourages fit-for-purpose content, and helps those completing the tool to understand this is not a "checkbox" exercise: rather it is a strategic, value-added, direction-setting process that requires a high standard of due diligence in considering desired results and how best to bring them about. The template should require specific content, helping staff at the earliest stages of planning for engagement identify the following:

- One or more decisions specific enough to serve as the basis for engagement planning (see Benchmark 1 for additional information regarding leading practice in this regard);
- The decision maker(s);
- Who will be engaged and why these groups were chosen;
- What is already known about the relevant perspectives of those who will be engaged (based on analysis of past feedback and public positions) (see also Recommendation 4);
- Why engagement is needed to inform the decision(s) to be made;
- Other inputs to the decision – such as technical reports;
- The promise to those who will be engaged regarding their level of influence – in alignment with the levels in the Engage Policy; and
- A brief summary of tactics that may be used, demonstrating alignment with anticipated resources and the promise.

3.2 Clarify Council's role in setting and following through on promises

In some instances, Council will be the decision maker identified in the Engage Assessment. Some engagements are initiated through Council, and decisions informed by engagement are often made at the Council table. They have an important role to play in making sure promises made to those who are engaged are realistic and kept. They also have an interest in make sure that the Engage Policy - set by Council - is being implemented effectively and consistently, with effective quality controls and structures in place to ensure accountability for policy alignment and corresponding results.

It is important to find effective and efficient ways of engaging Council in the assessment stage, when they are the ultimate decision maker identified; and to provide the opportunity to provide direction about engagement expectations and the promise to Calgarians, so that accountability is clear at the end of the process.

Spotlight: City of Denver

Denver's City Council is more directly involved in setting direction for public engagement efforts than in Calgary. Council members (individual and collectively) are often involved in advising on engagement strategy. Engagement staff coordinate directly with Council districts. A recent (2023) review recommended further formalizing this process with guidelines for Council involvement in outreach efforts. For some large projects, a Community Engagement Committee will be formed with Council members as participants.

Specific needs include:

3.2.1: Early in planning, identify engagements on issues with large or city-wide impacts. For these, be deliberate about Council's role in setting and committing to promises. Establish a systematic approach for Council involvement in these engagements to reinforce transparency and accountability.

3.2.2: Establish workflows that enable effective direction-setting by Council for needed engagement, while enabling City staff to brief, advise, and seek clarification from Council in a timely and effective way – leading to the efficient development of engagement plans that are feasible to implement and well-aligned with Council's needs. It is acknowledged that constraints created through Bill 50 create complexity in carrying out this action that will need to be taken into account in developing a functional workflow.

4 Strengthen **Interested Party analysis** to support selection of engagement tactics.

4.1 Conduct analysis of those to be engaged immediately after Engage Assessments are complete.

4.1.1 Make Detailed Participation Table mandatory

4.1.2 Centralize prior feedback and relationship history

4.1.3 Define criteria for engagement scale

4.1.4 Position ERU to have authority over which Interested Party groups should be engaged with

Engagement tactics include all the actions taken to achieve the objectives identified during the engagement assessment stage. This includes who is engaged, how, when, and about what; and marketing and communications. Tactics should be tailored to reflect what is already known about:

- **The perspectives of those that will be engaged.** This helps ensure engagement adds new intelligence to decision makers that cannot be gleaned from other sources. It helps prevent engagement from feeling repetitive or generic, and reduces the risk of those being engaged feeling like their past statements weren't heard or valued.
- **The understanding, needs, and preferences of those who will be engaged.** This helps select tactics that make it possible for those whose perspectives are needed to participate successfully in engagement, and also signals to those who are engaged that they matter.

Interested Party analysis is most valuable when it moves beyond listing participants to providing insight into their needs, preferences, and prior feedback. Strengthening the rigor of this process supports more strategic use of resources and reinforces public confidence by demonstrating that engagement is purposeful and thoughtfully designed with their needs and preferences at the forefront.

Actions:

4.1 Conduct analysis of those to be engaged immediately after Engage Assessments are complete.

The Assessment stage should include a preliminary assessment of whose perspectives are needed. At the beginning of the planning stage, detailed analysis should be completed to identify who needs to be engaged, why, and how. There should be a clear connection between this analysis and the selection of tactics, rather than a “catch all” approach in which a wide range of generic tactics are deployed.

Specific needs include:

4.1.1: Make the Detailed Participation Table a mandatory component of engagement planning, including documenting all Interested Parties, their needs, preferences, past feedback, and barriers to participation. The results of this analysis should be summarized in subsequent engagement planning documents to provide a clear rationale for the design of engagement tactics.

4.1.2: Develop a centralized database to store prior engagement feedback and relationship history to help those planning new engagements build on what has been previously gleaned.

4.1.3: Clarify criteria to help guide choices regarding the scale of engagement. Some engagements need to be city-wide and inclusive of all Calgarians; while others do not. It should not be assumed that large scale engagement that includes everyone is a better practice: analysis of who needs to be included should guide the scale of engagement, and tactic selection. The rationale for scale should be clearly stated in planning documents.

4.1.4: Supported by Recommendation 1, the ERU should have the authority to make the final determination on which interested parties need to be engaged for each project. This rationale should explain why certain groups are included or excluded, especially in cases where individuals or groups express interest but are not engaged, or where Council has specific expectations about who should be engaged. Documenting this process will help address concerns from Council or the public and provide transparency.

5	Manage **relationships** systematically.	**5.1 Define role of structural entities such as advisory committees**	**5.2 Track and manage relationships proactively**	**5.3 Assign accountability for relationship oversight**
		5.1.1 Clarify entities roles in shaping engagement	5.2.1 Implement CRM for relationship tracking	5.3.1 Identify Leads for Key Community Partnerships
		5.1.2 Create an inventory of structural entities and identify gaps in representation	5.2.2 Monitor Engagement Plans and Enhance Early Relationship Management	

Strong relationships outside of individual engagement projects lead to better planning, higher quality participation in engagement, better insights for decision makers, and ultimately greater returns in the form of higher public trust. The City collectively has a broad and deep network of relationships, but a given engagement process may or may not be able to leverage what exists. Currently, relationships that could be leveraged to strengthen engagement are often tied to individuals in different departments – meaning that an engagement team may or may not know about them, and that when these individuals leave The City the relationship may no longer be attached to anyone internal. There is no clear sense of what strengths and gaps exist, or which relationships are most essential to engagement. A more coordinated way of understanding what relationships exist, who holds them, and how these can translate into stronger more effective engagement is needed.

Actions:

5.1 Define the role of standing structural entities like Advisory Committees in relation to engagement.

The City leads and participates in a number of existing tables, such as multi-stakeholder Advisory Committees, that could be leveraged to play a role in shaping engagement policy and/or in improving the performance of individual engagement projects.

Specific needs include:

5.1.1: Identify what role these tables are envisioned to play in shaping engagement – and whether they are willing and able to fulfill the role as envisioned within their mandate. This should build on past successes that can help define what success looks like. For example, as highlighted in Finding 3, the Chinatown pilot demonstrates how advisory bodies can successfully broker engagement with the community. Learning from examples like this helps clarify what these tables are meant to do and what effective engagement looks like.

5.1.2: Develop an inventory of existing tables and identify who stewards The City's involvement in these currently. Identify gaps in representation and take action to remedy these.

5.2 Proactively track and manage relationships.

Many strong relationships exist between City staff and Calgarians that could be proactively leveraged to strengthen engagement. Key relationships should be managed to ensure continuity when City staff retire or move to jobs with other organizations.

Specific needs include:

5.2.1: Develop a customer relationship management (CRM) tool, to identify who within The City has working relationships with key individuals and groups. Use this tool to proactively manage and ensure continuity of key relationships, to gain insights on the needs, preferences, and perspectives of key groups and individuals.

5.2.2: In concert with Recommendation 1.2, monitor planned engagement to identify when a particular geographic area or groups' perspective is likely to be needed. Strengthen proactive relationship management early so that engagement planning can be as relevant as possible and to encourage higher participation.

5.3 Establish accountability for relationship oversight as part of the mandate of specific business units and/or roles.

The City regularly partners with key external groups to plan and hold meaningful engagement that encourages participation. For example, partnership with Community Associations and groups like Action Dignity regularly help to shape the objectives and tactics of engagement projects. A systematic approach to working with such groups would help clarify their role in engagement and enable better management of these relationships – in alignment with the goals of a portfolio management approach, described under Recommendation 1.2 above.

Specific needs include:

5.3.1: Identify who is best positioned to lead and oversee relationships with community groups for the purposes of strengthening partnerships in engagement planning and delivery (e.g., ERU for enterprise equity partnerships, Neighbourhood Partnership Coordinators for Community Associations, Indigenous Relations Office for Indigenous governments and organizations, etc.) and publish an internal responsibility matrix.

Implementation Framework

Public engagement is more than a process - it is a promise. It is how Calgarians see that their voices matter, and how their input can shape the decisions that affect their city. The recommendations in this report set out a bold vision for strengthening that promise, but vision alone is not enough. To build trust and deliver meaningful change, The City needs a clear path forward - one that turns ideals into action, and action into lasting improvement.

This Implementation Framework is designed to do exactly that. It answers the question: *"How do we make this real?"* It offers a practical roadmap for translating the recommendations from this Review into tangible steps. The framework is not a detailed operational manual; rather, it is a guide for The City to understand what needs to happen first, what can be achieved quickly, and what will require longer-term investment and coordination.

The First Year

Turning recommendations into action calls for a disciplined approach to help make sure that every step is purposeful, practical, and aligned with The City's vision for public engagement. The City cannot - and should not - implement every recommended action at once. Sustainable change is often well served by starting with what will deliver the greatest impact with the least complexity, while laying the foundation for more ambitious improvements - building needed clarity and support for more difficult changes.

Recommendations were assessed to determine how they compare on the basis of:

- **Interdependence:** Does this step unlock future progress, or does it rely on other changes to succeed? and
- **Complexity:** How challenging is it to implement?

Based on this analysis, the following sequence of actions is recommended for the first year. Council will make decisions regarding the approach, sequence, and timing for implementation with support from City staff. Feasibility and budgetary factors should be considered in this planning process.

Months 1-6: Building readiness

Recommendations 1 and 2 are the most important to proceed with in the short term, even though they have complex elements. These actions will put in place the foundation needed to set up Recommendations 3-5 for success.

The following actions are recommended to be completed within the first months of implementation to lay the groundwork for next steps.

1.1.1 Develop a business plan outlining how new responsibilities that are not already part of the ERU's work will be organized and staffed, and results expected from the new structure with a corresponding performance evaluation approach.

1.1.2: Identify resource, staffing, and workflow changes needed to implement the envisioned structure, and develop a change management strategy to guide implementation of changes within a one-year timeframe.

2.2.3: The ERU requires authority to act as a stage gate in the engagement planning process, providing assurance that all engagement tactics align with the decision(s) and promise included in the approved Engage Assessment, and that follow up with those who were engaged provides accountability for follow through on the promise.

Months 7-12: Building momentum

Once the above actions are well underway, the following actions are recommended to be carried out – further advancing key elements of the needed oversight, while beginning to make needed process improvements. Many of these actions are relatively low complexity.

1.2.2: A quarterly dashboard of engagement should be submitted to ELT to inform allocation of resources based on risk and needs, support consistency in outreach and marketing, and development of relationships.

2.2.1: Update engagement planning and delivery guides and tools to prompt project teams to ground all their work in, and demonstrate alignment with, the decision(s) and promise included in the approved Engage Assessment.

3.1.1: Shift from using a brief Engage Assessment Form as the first step in the engagement process to using a templated report with headings – similar to the form currently used for Engagement Strategies.

4.1.1: Make the Detailed Participation Table a mandatory component of engagement planning.

5.1.2: Develop an inventory of existing tables and identify who stewards The City's involvement in these currently.

Months 13+: Building impact

Remaining actions are recommended to be implemented after the first year, and should be timed such that key aspects of the foundation are in place to guide their delivery prior to proceeding.

Managing Change

Implementing change is never just about new policies or processes, it is, fundamentally, about people. Even the strongest recommendations can falter if those responsible for delivering them are not ready, willing, and able to act. Change management is what helps organizations move from where they are today to where they need to be tomorrow.

For Calgary, strengthening public engagement is not a minor adjustment - it's a shift in how decisions are made, how promises are kept, and how trust is built. This requires more than technical fixes; it demands alignment across leadership, clarity for staff, and confidence for the public.

Figure 7 outlines how The City can manage and communicate change at each phase.

Figure 7: Change Management

Source: Prepared by KPMG.

Appendix

Appendix A: Key Terms

Table 4 below is a glossary of key terms used throughout this document.

Table 4: Key Terms and Definitions

Term	Definition
Accountable Follow up	Good engagement communicates how feedback was received and used in decision-making.
Appropriate Tactics	Good engagement selects approaches that are shaped by the strategy and tailored to the project's purpose.
Benchmark	A standard or point of reference against which the performance of program, policy or intervention can be measured or compared.
Clear Strategy	Good engagement sets a clear scope, the decisions to be made, and the promises to participants.
Collaborate	Within the context of the Spectrum of Strategies and Promises: An engagement level where participants are partners in decision-making. The City works jointly with participants to develop recommendations and communicates how collaboration shaped outcomes.
Communicator	A team member who supports public communication and advertising for a project. The Communicator helps develop engagement materials, promotes opportunities, and ensures information is accessible to the public.
Consult	Within the context of the Spectrum of Strategies and Promises: An engagement level focused on gathering feedback to analyze issues and build alternatives. The City promises to consider input and advise how consultation influenced decisions.
Content Outline	An ERU template to organize and present key project and engagement information in plain language.
Developing	In the context of the maturity rubric: Standardized practices are more fully or consistently implemented and used consistently. There may be different or conflicting interpretations based on informal processes and principles. There is limited evaluation and feedback process to monitor and measure performance.
Empower	Within the context of the Spectrum of Strategies and Promises: An engagement level where aspects of decision-making are delegated to participants. Where permitted by legislation, decisions made by participants are respected by The City.
Engage Assessment Form	A tool used at the start of a project to determine whether public engagement is required. Completed by the Project Manager and Communicator, it assesses project impact, complexity, and identifies decisions open to public input.
Engage Framework	A guiding document that outlines the step-by-step process for conducting engagement at The City. It provides practical instructions, roles, tools, and best practices to ensure engagement activities align with the Engage Policy.
Engage Plan	A detailed roadmap for implementing the Engage Strategy. It sets goals, objectives, timelines, roles, responsibilities, and specifies the tools and techniques for gathering and reporting public input.
Engage Policy	The City of Calgary's official policy that sets the high-level direction, principles, and expectations for public engagement. It defines when and how engagement should occur, emphasizing transparency, inclusiveness, and accountability.
Engage Portal	The City of Calgary's online platform (calgary.ca/engage) where residents can find, learn about, and participate in engagement opportunities for City projects.
Engage Portal Template	A standardized template used to create project pages on the Engage Portal.

Term	Definition
Engage Resource Unit	A centralized team within The City is responsible for supporting public engagement through training, guidance, tools, and process stewardship. The ERU provides expertise to help ensure engagement activities align with policy and leading practices.
Engage Strategy	An engagement template that outlines the approach, anticipated activities, and rationale for engagement. It details the "what, who, how, when, and why" of the engagement process, including barriers to participation.
Evaluation Template	A form developed by the ERU to collect participant feedback during engagement sessions. It assesses satisfaction, understanding, and effectiveness, supporting continuous improvement of engagement activities.
Formative	In the context of the maturity rubric: Practices are inconsistent and largely reactive. There is little or no formal structure or standardization in place. Practices may be ad hoc or applied inconsistently across projects or departments in the organization.
Historically Marginalized Group	The term Historically Marginalized Group is used in The City Leader Guide on Civic Engagement (Bloomberg Centre for Cities, 2023). The Government of Canada's Guide on Equity, Diversity and Inclusion Terminology (Government of Canada, 2025) defines a marginalized group as a group of people that are excluded from full and meaningful participation in society, typically through discrimination or other means of oppression. One common criticism of this term is that the word "historically" can unintentionally imply the marginalization occurred only in the past. As an alternative, some jurisdictions – such as Toronto, Guelph, and Portland - use synonymous terms such as equity-deserving, equity-seeking, and equity-denied groups. This document use Historically Marginalized Group to align with literature used to define leading practice; however, wording used in external-facing communications may use synonymous terms (like equity-deserving).
Inclusive Engagement Guide	A resource designed to help project teams identify and address barriers to participation.
Interested Party	An Interested Party is an individual, group, or organization with an interest in the results or outcomes of the public engagement process. This includes internal (e.g., The City staff, elected officials) and external interested parties (e.g., residents, community-based organizations). While the term "stakeholder" is sometimes used interchangeably, this report adopts the language of "Interested Party" to align with The City's preferred terminology and direction.
Interested Party Engagement	The process of involving individuals, groups, or organizations that have an interest in or are affected by decisions.
Leading Practice	An approach, practice, method or process that is recognized as evidence-informed and having demonstrated positive change in achieving desired outcomes. Leading practices are informed by research, expert consensus, and relevant guiding principles.
Level of Influence	The degree of impact that participants have on decisions made by a government or organization during a public engagement process. The City of Calgary's Engage Policy, defines the levels of influence through the Spectrum of Strategies and Promises.
Listen & Learn	Within the context of the Spectrum of Strategies and Promises: An engagement level where The City and participants share and learn about each other's views, concerns, and expectations. The City's promise is to listen and learn from participants' perspectives.
Mature	In the context of the maturity rubric: Practices are embedded into all aspects of the public engagement strategy. There is a culture of continuous improvement and regular evaluation and refinement of processes and practices. Engagements are designed and refined based on leading practices and the most current available research.
Maturity	In the context of the maturity rubric, maturity refers to the extent to which a practice, process or capability is fully developed and embedded in the organization. Maturity levels include Formative, Developing and Mature, and are used to assess the current state and identification of areas of opportunity for improving public engagement practices.

Term	Definition
Organizational Capacity	These pillars to good engagement are supported by organizational capacity. This means having the right resources, expertise, and controls in place to ensure engagement is effective, efficient, and accountable.
Project Manager	The individual responsible for leading a City project or initiative. In the engagement process, the Project Manager collaborates with the ERU and Communicator.
Public Engagement	The process through which government and institutions involve the public in decision-making. Public engagement includes a variety of activities designed to inform, consult and collaborate with residents to shape policies, programs and services.
Review Framework	The approach used to assess The City's public engagement practices in relation to benchmarks.
Scope of Engagement	Defines the decisions to be made, the promise to Interested Parties, and the boundaries of what is open for input. Scope clarifies what participants can influence and what is outside the engagement process.
Stage Gate	A stage gate is a formal checkpoint or decision point within a project or process where progress is reviewed before moving to the next phase. Within the context of public engagement, stage gates can be used to help ensure alignment with policy and quality standards.
Spectrum of Strategies and Promises	A framework within the Engage Policy that defines four levels of public influence on decisions: Listen & Learn, Consult, Collaborate, and Empower. Each level includes a specific promise about how input will be considered.
Universal Design (UD) principles	A set of principles aimed at creating environments, products, and processes that are usable by all people, to the greatest extent possible, without the need for adaptation. In engagement, UD principles guide the design of accessible and inclusive processes, materials, and tools.
"What We Heard"	In the context of this report, "What We Heard" refers to a public summary that captures the input, feedback, and key themes collected from participants during engagement activities. The ERU offers a standardized "What We Heard" template.
"What We Heard – What We Did"	This is the ERU's comprehensive report back template, which includes both the summary of public input ("What We Heard") and an explanation of how that input influenced decisions ("What We Did").
"What We Did"	In the context of this report, "What we Did" refers to a public report that highlights how The City used public information to influence decision. In other words, what was done with the input. It may also include what was done with the project, and what was done with the engagement process.

Source: Prepared by KPMG.

Appendix B: Document Review List

KPMG conducted a review of materials relevant to assessing The City's public engagement practices. This included, but was not limited to:

Established Public Engagement Frameworks and Standard and Innovative Practices in Comparable Jurisdictions

KPMG independently examined nine widely recognized frameworks to identify practices considered effective by leaders and experts in the field. These frameworks included:

- Public Policy Forum: Rescuing Policy – The Case for Public Engagement
- Alberta Municipalities and Rural Municipalities of Alberta: Public Engagement Guide
- Bloomberg Harvard: City Leader Guide on Civic Engagement
- OECD Guidelines for Citizen Participation Processes
- IAP2 Public Participation Spectrum
- Morris J. Wosk Centre for Dialogue: Maturity Model for Public Participation
- Centre for Advancing Public Engagement
- Simon Fraser University: Public Engagement Toolkit
- KPMG's Public Engagement Maturity Model

Additionally, KPMG independently researched practices of 13 jurisdictions to provide insights into sector norms and emerging practices:

- Canada: Edmonton, Vancouver, Toronto, Guelph
- USA: Denver, New York City, Portland, Seattle, San Francisco
- International: London (UK), Melbourne (Victoria, Australia), Onkaparinga (South Australia), Mosman (New South Wales, Australia)

The experience of KPMG specialists from leading public engagement in many different contexts was used to validate research findings and address gaps.

Case Studies:

KPMG reviewed documentation from five previous public engagement initiatives to assess how The City's policies and procedures were applied in practice:

- South Shaganappi Communities Local Area Plan (2025)
- Drought Resilience Plan (2023)
- Foothills Land Annexation (2023)
- Secondary Suite Registration Feedback (2023)
- Liquor in Parks (2019)

In addition to materials available on the Engage Portal, The City provided supplementary documents for each case study where available. These included, but were not limited to, Engage Assessments, strategies and plans, and report-back documentation.

City Policies Related to Engagement

Policies governing public engagement were analyzed to understand their alignment with best practices and operational requirements. Examples include:

- Calgary Corporate Accessibility Policy
- Calgary Engage Framework
- Calgary Engage Policy
- Calgary Engagement Process
- Calgary Inclusive Engagement Guide (2024)
- ERU and Comms Tips and Tricks
- ERU Internal Intake Request Process
- Indigenous Policy
- Integrated Risk Management Policy
- Plain Language Policy
- Social Wellbeing Policy
- Triple Bottom Line Policy
- Welcoming Community Policy

City Operational Tools and Templates

In addition to the above, KPMG reviewed several documents outlining operational tools and templates provided by The City.

Note: This list is not exhaustive.

Appendix C: Case Study Information

Table 5 below presents a summary of each case study reviewed, including key details about the engagement approach, audiences, outreach methods, and participation for each project.

Table5: Case Study Summary

Project	South Shaganappi Communities Local Area Plan	Drought Resilience Plan	Foothills Land Annexation	Secondary Suite Registration Feedback	Liquor in Parks
Engage Portal Link	South Shaganappi Communities Local Area Plan (2025)	Drought Resilience Plan (2023)	Foothills Land Annexation (2023)	Secondary Suite Registration Feedback (2023)	Liquor in Parks (2019)
Year	2023 – 2025	2023 – 2024	2022 – 2023	2023	2019
Project Summary	South Shaganappi Communities Local Area Plan project was to set out a 30 year vision with the policies to guide growth across 9 communities.	The Drought Resilience Plan is a citywide Framework for a Drought-resilient Calgary.	The Foothills Land Annexation was a proposed annexation of 415 acres from Foothills County for future urban development. The proposed annexation was withdrawn by Council.	The Secondary Suite Project was to improve the registration process for secondary suites to increase legal secondary suite registrations.	Pilot program to explore responsible alcohol consumption at designated picnic sites in city parks.
Engagement Summary	The South Shaganappi LAP project was supported by two years of engagement. Engagement was broken down into four phases, to understand the communities history, explore areas of growth, envision the future, and determine priorities.	The City of Calgary used the draft Drought Resilience Framework - which outlines the vision, principles, goals, and strategic actions - as the foundation for engagement. Participant feedback informed the final Drought Resilience Plan presented to Council, with a focus on	The engagement process was designed to support the Annexation Negotiation Committee's discussions. In collaboration with Foothills Country, The City planned a four-phase engagement strategy involving relevant stakeholders. However, only the initial	The engagement aimed to identify challenges to registering secondary suites and ways to increase legal registrations through an online survey.	Gauge public opinion and inform pilot design.

Project	South Shaganappi Communities Local Area Plan	Drought Resilience Plan	Foothills Land Annexation	Secondary Suite Registration Feedback	Liquor in Parks
		strategies, opportunities, challenges, and equity considerations in drought management.	phase was completed prior to the withdrawal of the proposed annexation.		
Advertising Methods (Summary, not comprehensive)	Digital and print ads, social media, community newsletters, mailed booklets, signs in high-traffic areas, engagement stations.	Social media, radio ads in multiple languages, posters, postcards, community partners, library displays, news coverage	Project webpage, direct invitations, media releases, council and committee updates	Mall kiosk ads, website banners, targeted social media, mailers, road signs	City websites, social media, press releases, emails to previous picnic site bookers
Engagement Methods (Summary, not comprehensive)	Online surveys, in-person and virtual sessions, mailed engagement booklets, walking tours, working group, community pop-ups	Online portal and surveys, pop-up events, library displays, workshops, focus groups, paper questionnaires	Open houses, direct engagement with landowners, residents, and NGOs	Online survey (targeted at homeowners and renters)	Online survey and internal engagement.
Engaged Parties (Summary, not comprehensive)	Residents of all ages, business owners, community associations, developers, students, working group members	General public, businesses, NGOs, youth, equity-deserving groups, Indigenous rightsholders, seniors, newcomers and The City	Foothills landowners, nearby residents, Calgarians, environmental NGOs, municipal and regional authorities	Homeowners with registered and unregistered suites, renters, internal staff	General public, internal staff

Source: Prepared by KPMG.

Appendix D: Interested Party Engagement

Interested Party engagement was carried out to help validate and/or expand findings from the Document Review and Case Studies. In addition to a public survey that received 1,755 responses. KPMG conducted interviews and small group discussions from May through September of 2025 to gather informed perspectives for the Review. In total, 23 sessions were conducted with 86 participants, as follows.

Table 6: Interested Party Engagement

Interested Party	Description	Number of Sessions and Participants
Mayor and Members of Council	Individual interviews with The Mayor and Members of Council. Interviews included questions on when engagements are required, the decision-making process, and the roles and responsibilities associated with public engagement.	7 sessions were conducted with 7 participants.
City Administrative Staff	Focus groups with ward staff and administrative staff supporting Executive Leadership Team members to gather insights into their experiences with City-led, Councillor-led, and constituency engagement efforts.	2 focus groups were conducted with 6 participants.
City of Calgary Staff	Small group interviews with City of Calgary staff who are directly involved in planning, implementing, or responding to public engagement initiatives.	11 focus groups were conducted with 40 participants.
City of Calgary Engage Resource Unit (ERU):	Interviews & focus groups with ERU leadership and staff on engagement practices and processes.	7 sessions were conducted. This included: - Interview with ERU Manager - 2 focus groups with ERU leadership (4 participants) - 3 focus groups with ERU staff (14 participants) - Supplemental focus group with ERU staff (6 participants)
Public Survey	From June to September 2025, Calgarians were invited to share their perspectives on public engagement through an online survey administered by a third party. The survey was accessible via a link on The City's Engage Portal* and was offered in seven languages. *The City did not have access to the survey backend or data.	1,755 respondents
Community Associations	Individual and small group interviews with the Federation of Calgary Communities (FCC) as well as focus sessions with various Community Associations.	4 sessions were conducted. This included: - 1 Individual Interview with FCC - 1 Small Group Interview with FCC (5 participants) - 2 Focus Groups with CA Representatives (19 participants)

Interested Party	Description	Number of Sessions and Participants
Community Public Engagement Sessions	In-person ward sessions (two sessions for each of the 14 wards) were hosted during July – September 2025 to gather Calgarian's perspectives on public engagement.	14 ward sessions were conducted with 145 participants.
Public Engagement Working Group:	A future-focused working group discussed how leading practices and changes in approach might strengthen public engagement in Calgary.	5 sessions with 11 members

Source: Prepared by KPMG.

Appendix E: Detailed Review Findings

Assessment criteria

Twenty (20) benchmarks were identified through an in-depth review of practices in comparator jurisdictions and leading engagement frameworks. All benchmarks are grounded in principles of excellent engagement, and – if implemented – contribute to achieving the desired outcomes of engagement – such as trust and social stability.

The **maturity** scale (Figure 8) was used to categorize The City's practices into one of three levels: formative, developing, or mature relative to leading practice. The terminology associated with each level helps to systematically document findings and provides a clear rationale for why a particular maturity level was assigned to each benchmark.

Figure 8: Maturity Scale

Formative

- **Absent:** Processes, tools, and practices are not evident
- **Ad hoc:** Processes, tools, and their application vary widely across the organization without rationale or apparent alignment

Developing

- **Standardized:** Processes, tools and templates are used
- **Consistent:** Practice is largely the same across the organization and in multiple contexts
- **Guided:** Decisions regarding application of tools are guided by adherence to protocol and desire to mitigate risks
- **Tracked**: Documentation and record keeping of the engagement process are comprehensive and demonstrate due diligence

Mature

- **Results-driven:** Policies and processes are thoughtfully adapted and implemented to maximize societal benefits in alignment with principles
- **Purposeful:** Decisions regarding the application of tools and processes are informed by experience, expertise, context, and strategic direction
- **Systematically aligned:** While practices may vary, there is overarching continuity across the organization

Source: Prepared by KPMG.

How this section is organized

For the purposes of this Final Report, the benchmarks and their findings are sequenced in alignment with the elements of "good" engagement described previously (see the section titled: What Is "Good" Public Engagement? on page 9, Figure 3). The wording of some benchmarks has been shortened or re-worded for length and clarity.

For each benchmark, the following information is provided:

- An explanation of why each benchmarks is included, what practices should be observable when each benchmark is met, and sources of evidence that were relied on to evaluate the benchmarks.
- For each benchmark, an overall maturity rating of applicable **policies** (including policies, standard operating procedures, frameworks, and other tools that indicate how The City intends to carry out engagement) and **practices**.
- Detailed findings for each benchmark using adjectives from the maturity scale to provide a rationale for overall ratings (shown in **blue**).
- Opportunities for to further strengthen policy and practice.

Table 7: Benchmarks

Element of Good Engagement	Benchmarks
Clear Strategy	**1.** When the public is engaged, planning clearly defines the decisions to be made, and the role of public engagement relative to each decision. In addition, please see the following benchmarks in subsequent sections in relation to alignment with clear strategy: 4, 5, 6, 10 and 14.
Appropriate Tactics	**2.** An intentional and systematic approach is used to understand the needs and concerns of those affected by decisions. **3.** Ongoing relationship-building and reconciliation with historically marginalized groups is pursued to enable timely and meaningful participation of these groups in engagement processes. **4.** The design of public engagement is aligned with and optimizes available resources relative to objectives. **5.** Engagement participants are made aware of how their input will be used as well as other inputs to decision-making. **6.** Materials and resources are presented in the language and format most appropriate to the audience, subject matter and focus of engagement. **7.** Engagement processes intended to be inclusive and accessible offer flexible formats and varied scheduling to accommodate diverse needs. **8.** Information about the engagement process is available, clearly communicated, and accessible to participants in formats appropriate for the audience.
Accountable Follow-up	**9.** Engagement participants are kept up to date and informed regarding the decision-making process. **10.** Mechanisms are in place to help ensure commitments made to the public regarding their level of influence on decisions are kept, and/or to ensure a systematic approach for making and transparently communicating decisions to deviate from commitments. **11.** Reporting to the public regarding how the results of engagement were used to inform decisions demonstrates alignment with the intended role of engagement. **12.** Reporting to the public regarding how the results of engagement were used to inform decisions is delivered in formats and language reflective of and appropriate for the audiences that were engaged.
Organizational Capacity	**13.** Clear policies and processes guide when public engagement is necessary and how it should be conducted. **14.** Roles and responsibilities related to public engagement are clearly defined at all organizational levels. **15.** Appropriate experts (e.g., public engagement specialists, subject matter experts) are available and embedded in public engagement design, delivery and reporting to ensure effectiveness. **16.** Accountability mechanisms are in place to help ensure staff adhere to established public engagement policies, and processes. **17.** Public engagement policies and practices undergo continuous improvement, informed by research and feedback collected from the public, interested parties and decision-makers.

Element of Good Engagement	Benchmarks
	18. Diverse populations and historically marginalized groups contribute to the development and continuous improvement of public engagement policies, services and processes. **19.** Key Performance Indicators (KPIs) are established, and regular performance measurement of public engagement processes at an organizational level is occurring. **20.** Participation rates of various demographic populations in public engagement activities are tracked and reported to demonstrate the extent to which the intended audiences were actually engaged.

Clear Strategy

Good engagement starts with a clear strategy that identifies a specific decision to be made, and a promise to the public about how their input will be used by the decision maker. This sets the scope of engagement: activities carried out under the strategy must align with these parameters.

Benchmark 1: When the public is engaged, planning clearly defines the decisions to be made, and the role of public engagement relative to each decision.

Why was this benchmark included?

When this benchmark is met, a role and intended level of influence for public engagement is clearly defined in the context of specific decisions. Leading practice in the IAP2 model of engagement is to go beyond identifying a general topic of interest of engagement, and delineate precise choices that will be made with engagement feedback – as well as who will make them. The table below offers examples to show the difference between a well-defined decision in contrast with topics or general tasks that may be related but are not suitable as the focus for engagement planning. When a topic is too broad, it is very challenging for members of the public to see how their feedback informed related decisions. Refer to Finding 1 under section "Review Findings" of this report for an example of broad vs. specific decisions.

Clear communication regarding what decisions will be made, who will make them, and the role of public input can foster transparency and help members of the public determine whether, how, and when to share their perspective. This is associated with higher levels of participation and higher levels of satisfaction with engagement processes.

When the level of influence relative to decisions is not clearly identified and communicated it creates the risk of members of the public providing feedback that is unhelpful in making the decision at hand and creates unrealistic expectations regarding how input will be used. When these expectations are not realized, it can lead to frustration, loss of trust and disengagement.

What practices can be observed when this benchmark is met?

Practices that should be observable to indicate whether this benchmark is met include (but are not limited to) the following

– Engagement plans indicate what decisions will be made and when using the results of public engagement.

– Engagement plans indicate what level of influence the public will have on identified decisions, using a scale such as the IAP2 Spectrum of Public Engagement.

How was this benchmark evaluated?

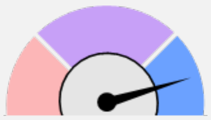
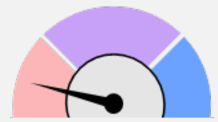
Evaluation of this benchmark drew on the following sources of evidence from this Review:

– Document Review: To assess policies, templates, and tools related to defining decisions and levels of influence.

– Case Studies: To examine how clearly decisions and influence levels were identified and communicated in practice.

– Engagement: To understand Calgarian’s perceptions of clarity around engagement purpose and influence.

Maturity Ratings:

Policies		Practice	
 Mature	There is clear intention to define decisions and levels of influence at the outset of planning for engagement.	 Formative	Specific decisions and promises to Interested Parties are not always identified.

Findings:

– There is a **purposeful** approach to directing all engagement to be linked to specific decisions, with the level of influence clearly laid out from the early stages of planning.

- The **Engage Policy** indicates that the promise to Interested Parties regarding how their input will be used will be clarified at the beginning of the process. It defines four possible promises, with increasing influence on decisions:
  - Listen & Learn: The City promises to listen and learn about the public’s plans, views, issues, concerns, expectations and ideas.
  - Consult: The City promises to consult the public and consider and incorporate their feedback to the maximum extent possible, and to report back to the public on how consultation impacted the decisions and outcomes.
  - Collaborate: The City promises to partner with participants in a process that results in joint recommendations, and report back on how collaboration impacted decision-making.
  - Empower: The City promises to abide by the decisions made by those engaged to the extent that legislation permits.
- The **Engage Framework** states an engagement plan “helps clarify what you are seeking input on”, the level of engagement or promise, and “decisions that are not open to input”.
- The **Engage Assessment Tool** must be submitted by Project Managers to the ERU at the outset of engagement planning. It requires statement of the promise to Interested Parties, relative to the four promises in the Engage Policy, as well as a description of:
  - Decisions that will be open to input from Interested Parties;
  - Decisions that have already been made; and
  - Promises that have already been made about Interested Party involvement.
  - The tool cautions Project Managers not to engage on decisions unless they are genuinely open to influence by Interested Parties, stating: “If decisions are not open to engagement, then it is not appropriate for your project.”
- The **Engagement Plan Template** indicates what decisions will be made, when, and by whom using the results of public engagement. The form asks questions such as:
  - “What are the decisions to be made, or the outcome that may be influenced by engagement?”
  - “What specific decisions will the engagement be asking for input to help influence?
  - “What will be done with the input collected during engagement?”
- The **Content Outline Template** requires communication of the promise to Interested Parties.

- In practice, identification of what specific decisions will be made relative to engagement, and the promise to Interested Parties regarding their level of influence, is **ad-hoc.**
  - Only Drought Resilience case study assessed in this Review demonstrated analysis of decisions to be made, stating in their Engage Strategy: “By October 2022, The City of Calgary will develop and approve a Drought Resilience Management Plan that will support a water secure future for Calgary and the region.” However, this is too broad to serve as the starting point for engagement planning.
  - The Liquor in Parks in Parks’ project, one of the case studies assessed in this Review, states in the Engage Strategy its intent is to “explore public opinion”.
  - Only two projects (Foothills Land Annexation and Secondary Suites) clearly state the intended influence level of Interested Parties in their Engagement Plans, using terms from the Engage Policy such as "listen and learn".
- Interested Party engagement conducted for the Review identified a number of examples where Calgarians’ expectations for the impact of an engagement were not met. Mismatched expectations create frustration and a sense that The City isn’t listening.

Opportunities for Continuous Improvement:

- Update planning documents to consistently identify specific decisions and clearly state the promise to Interested Parties.
- Introduce a quality check for early planning documents to ensure decisions are specific enough to support meaningful engagement and accountability.
- Treat the promise to Interested Parties like a project objective and reinforce it across all planning documents to anchor engagement activities and evaluation.
- Use the Detailed Participant Table consistently to assess whether different groups have varying levels of influence. Document this analysis to clarify expectations and guide tactic selection.

Appropriate Tactics

Good engagement uses tactics that flow directly from an overarching strategy. Tactics should align with the level of influence identified in the strategy, and demonstrate understanding of those who will be engaged. This helps ensure objectives are met, while providing consistent explicit and implicit cues to those who are being engaged about their role in the decision process.

Benchmark 2: An intentional and systematic approach is used to understand the needs and concerns of those affected by decisions

Why was this benchmark included?

When this benchmark is met, decisions are analyzed to determine whose perspectives should be considered before a decision is made. This includes analyzing the potential impacts of a decision and proactively identifying Interested Parties through tools such as past engagement records, public statements, and engagement when needed.

Accurately identifying Interested Parties helps ensure that relevant voices are included in the engagement process, leading to decisions that are more responsive to the needs and concerns of Calgarians. This is also a reflection of capacity, as it requires The City to have the systems, resources, and internal processes in place to consistently and effectively carry out this analysis across projects.

What practices can be observed when this benchmark is met?

Practices that should be observable to indicate whether this benchmark is met include (but are not limited to) the following:

– Processes, tools, and templates exist and are used to guide identification of interested parties and their needs in relation to decisions.

– Interested parties and their perspectives – such as those from past engagement and public statements – are identified and analyzed at an early stage of planning for a decision. When more information is needed to understand the perspectives and needs of interested parties, engagement plans specify how this information will be collected and used.

How was this benchmark evaluated?

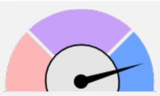
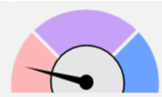
Evaluation of this benchmark drew on the following sources of evidence from this Review:

– Document Review: To assess the tools and templates used to support the identification and analysis of Interested Parties.

– Case Studies: To understand how the identification of Interested Parties is implemented in practice.

– Engagement and Survey: To gather Calgarians' perspectives on whether their needs and concerns are considered in decision-making.

Maturity Ratings:

Policies		Practice	
 Mature	The City has a process in place for identifying Interested Parties early in planning for a decision.	 Formative	In practice the use of tools is inconsistent, and the analysis of Interested Party perspectives is often limited or absent.

Findings:

– A **purposeful** process is in place for identifying Interested Parties early in planning for a decision, as follows:

– The **Engage Assessment** is the first form that must be submitted to the ERU when an engagement process is being considered and includes initial identification of who is likely to be impacted by the decision(s) at hand. The Project Manager completing the form must answer the following questions:

– "Are there decisions that will be open to input from stakeholders and citizens? If yes, what are they? If decisions are not open to engagement, then it is not appropriate for your project."

– "Have any promises been made about stakeholder and citizen involvement?"

– An **Engage Intake** meeting must be completed with ERU staff, sometimes with an accompanying form, requiring further refinement, identification, and discussion of Interested Parties.

– An **Engage Strategy and Approval** form must be completed, including confirmation of Interested Parties, what to seek input on, and analysis of potential barriers to participation in envisioned engagement activities.

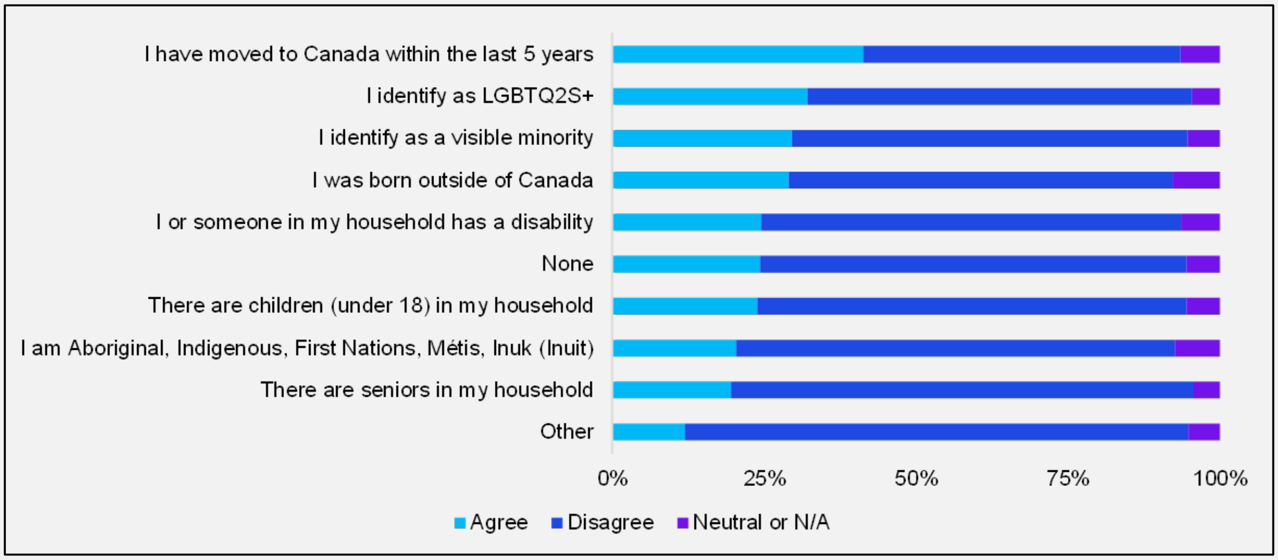
– An **Engagement Plan** or comparable content is sometimes completed, further specifying Interested Parties and possibly including information pertaining to communication.

– A **Detailed Participant Table** is sometimes used to analyze Interested Parties and their needs. The Project Manager would identify the "intersection" of each Interested Party with the project, what input is needed, and what level of influence Interested Parties are expected to have on decisions.

– For the case studies included in this Review, examples of the above templates were analyzed. Several identified Interested Parties and potential barriers to participation in engagement activities, such as the Drought Resilience project and Secondary Suites. For all case studies, documented analysis of perspectives, anticipated concerns, and needs were **ad-hoc**.

– Calgarians that participated in the Review's engagement sessions or responded to the Review's survey do not have confidence that their needs and concerns are considered when a decision is made. According to the Review's survey of Calgarians, only 16% of respondents felt their needs and perspectives were considered. However, this perception varies across demographic groups. Members of the LGBTQ2S+ community and newcomers reported comparatively higher levels of satisfaction, while respondents from households with seniors expressed the lowest levels of agreement. See Figure 9 for a breakdown of responses by demographic group.

Figure 9: The City tries to understand what people need and care about before making decisions.



Source: Prepared by KPMG on the Review's Survey Data.

Opportunities for Continuous Improvement:

- Make the Detailed Participant Table a required step in engagement planning to promote consistent analysis of Interested Party perspectives before engagement. Provide training and support to ensure effective use.
- Develop a reference guide for identifying Interested Parties to support a consistent approach. Include a tool that lists relevant groups and demographics for different types of decisions to help teams consider all potential Interested Parties.
- Encourage project teams to review past engagement records and public statements before starting new engagement to reduce duplication, prevent engagement fatigue, and demonstrate responsiveness to previous feedback.
- Improve communication with Councillors to identify Interested Parties for each engagement. Consult Councillors for insights into upcoming decisions and consider adopting practices like Denver's approach, where staff coordinate with Council districts and collaborate on strategy for significant public engagement processes.

Benchmark 3: Ongoing relationship-building and reconciliation with historically marginalized groups is pursued to enable timely and meaningful participation of these groups in engagement processes.

Why was this benchmark included?

Ongoing relationships can support The City's understanding of the unique backgrounds, experiences, and concerns of the community and provide a foundation for meaningfully including people and populations during specific engagement processes. This helps ensure appropriate consideration of individuals and groups that should be included, their concerns, how to contact them, and how to encourage and enable their participation.

What practices can be observed when this benchmark is met?

Practices that should be observable to indicate whether this benchmark is met include (but are not limited to) the following:

– There are structures such as processes, committees, groups, and/or other mechanisms in place to enable relationship building and reparation with historically marginalized groups. Terms of reference for these structures explicitly describe relationship and trust building as goals

– Engagement planning actively draws on these relationships to inform of engagement activities.

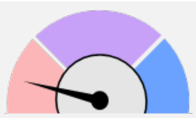
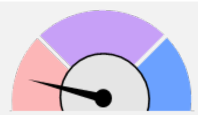
How was this benchmark evaluated?

Evaluation of this benchmark drew on the following sources of evidence from this Review:

– Document Review: To assess policies, guidance, and structures related to reconciliation and relationship-building.

– Survey: To gather Calgarians' perspectives on opportunities for ongoing engagement outside of formal processes.

Maturity Ratings:

Policies		Practice	
 Formative	Some polices support relationship-building, but they are not embedded in engagement processes.	 Formative	Use of existing relationship-building structures to support engagement is ad hoc.

Findings:

– There is **ad hoc** direction embedded in policy and operational tools to pursue reconciliation with historically marginalized communities, including through engagement.

  – The **Social Well-being Policy** indicates principles of equity, truth and reconciliation must be embedded in the process of public engagement.

  – The **Inclusive Engagement Guide** states engagement will be considered successful if several members of historically marginalized groups "report feeling safe sharing their opinions at the engagement event and that they felt welcome."

– Some **results-driven** structures exist to build relationships with historically marginalized groups, helping foster trust and putting in place the right conditions for meaningful engagement. Current structures are focused on Indigenous and other racialized communities. Use of these structures to strengthen engagement does not appear to be embedded in typical processes and leveraged on an **ad hoc** basis: City staff involved in engagement were either unaware of these groups or did not tend to view them as part of the engagement ecosystem.

  – The **Calgary Aboriginal Urban Affairs Committee (CAUAC)** advises The City of Calgary Council on policies, services, initiatives, and programs that impact Indigenous individuals and communities. CAUAC plays a role in fostering stronger relationships between The City and Indigenous communities. This is a group that may be tapped to help inform engagement that specifically impacts Indigenous peoples.

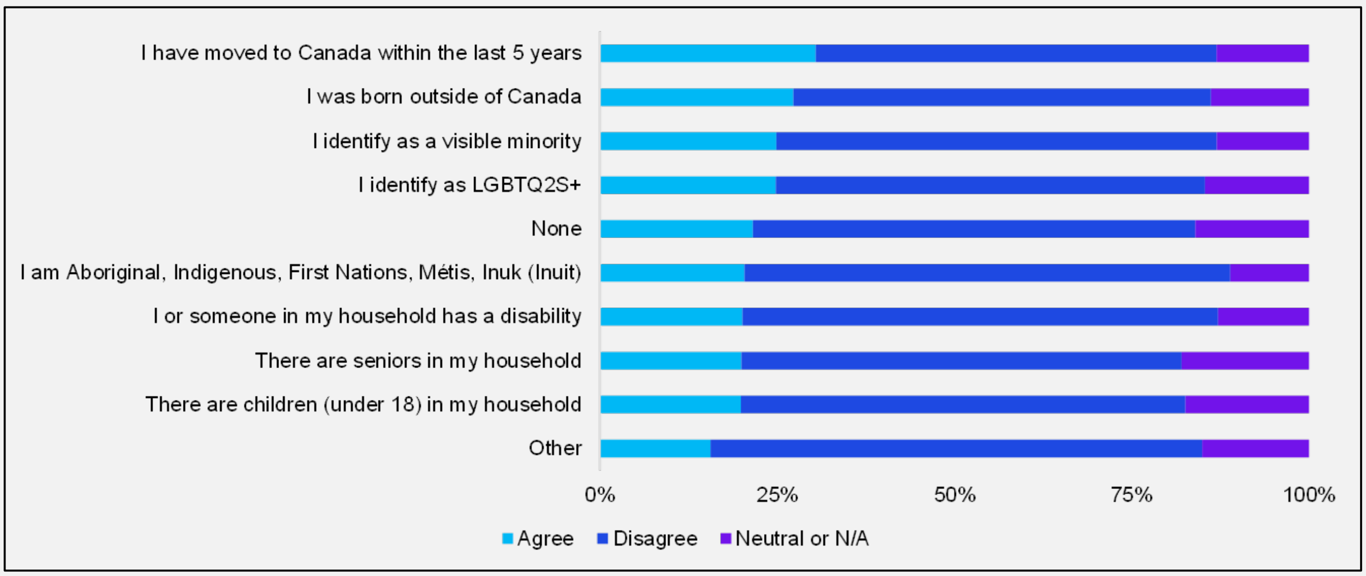
  – The **Calgary Local Immigrant Partnership (CLIP)** is an organization dedicated to fostering an inclusive and welcoming community for newcomers in Calgary. CLIP achieves its mission by collaborating with diverse community organizations and government agencies to address the unique needs of newcomers. As part of its efforts, CLIP serves as a structure that promotes trust-building and strengthens relationships with members of this community.

  – The **Indigenous Relations Office (IRO)** leads processes with Treaty 7 First Nations on matters of historical, traditional, and cultural significance, acknowledging their connection to the territory that is now Calgary. The IRO is guided by The City's Indigenous Policy which states that "The City of Calgary will sustain the active and shared process of reconciliation through investing in ways of knowing, ways of engaging, ways of building relationships, and ways towards equitable environments with Treaty 7 First Nations and urban Indigenous peoples to improve relations between The Corporation and the Indigenous community."

- **Advisory Committee on Accessibility** makes recommendations to City Council on policy and system issues and barriers impacting people with disabilities in Calgary.
- Interested parties that participated in engagement sessions conducted for the Review, suggested that City engagement practices could benefit from learning about Indigenous engagement approaches and how these can differ from traditional methods.
- Advisory Committees are leveraged at times as mechanisms to connect with historically marginalized groups, providing valuable perspectives to inform decision-making. ERU staff occasionally attend these committees' meetings to gain insights into issues faced by marginalized communities and to build relationships with networks critical for engagement. An example includes the engagement efforts in Chinatown, where consultations with advisory committees enriched the understanding of community concerns. Another example is the Drought Resilience case study assessed in this Review, where Action Dignity provided support for language translation.

- 63% of respondents to the Review's survey reported they lack ongoing opportunities to provide feedback to The City outside of public engagement campaigns. Notably, this sentiment was even more pronounced among respondents that indicated they identify as Indigenous (69%). Refer to Figure 10 below for the survey results for various demographics.

Figure 10: I feel like I have ongoing opportunities to provide feedback to The City, not just during specific public engagement campaigns.



Source: Prepared by KPMG on the Review's Survey Data.

Opportunities for Continuous Improvement:

- Provide brief training or guidance to engagement teams on the role of these groups and how to collaborate with them to support meaningful and effective relationship-building.
- Track and maintain ongoing relationships with historically marginalized communities to ensure these connections are sustained and leveraged in future engagement efforts.
- Explore how Indigenous engagement approaches - such as relationship-building, co-creation, and culturally relevant practices - can inform broader engagement strategies to strengthen trust and inclusion across all groups.

Benchmark 4: The design of public engagement is aligned with and optimizes available resources relative to objectives.

Why was this benchmark included?

Public resources are limited and must be allocated strategically to achieve the greatest impact. This requires decision-makers to determine when and how to invest in engagement, and for engagement planners to design processes that make the best use of available time, funding, and capacity.

When this benchmark is met, engagement methods are selected based on their alignment with the scope of the decision, the level of influence promised to the public, and the resources available. This helps avoid over- or under-engagement, supports meaningful participation, and reduces the risk of engagement fatigue.

What practices can be observed when this benchmark is met?

Practices that should be observable to indicate whether this benchmark is met include (but are not limited to) the following:

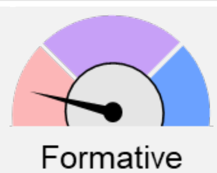
- Engagement methods and tools are evaluated and selected based on how well they align with the **scope of engagement**.
- Engagement methods are feasible to implement within available time and resources

How was this benchmark evaluated?

Evaluation of this benchmark drew on the following sources of evidence from this Review:

- Document Review: To assess policies and tools related to budgeting and resource planning for engagement.
- Case Studies: To examine how engagement methods were selected and resourced in practice.
- Engagement: To understand perceptions of how well engagement efforts are prioritized and resourced.

Maturity Ratings:

Policies		Practice	
	Policies and tools support alignment of engagement with available resources, but guidance on selecting methods based on cost-benefit analysis or level of influence is limited.		Engagement methods are often selected based on available budget or departmental capacity, rather than strategic alignment with engagement objectives.

Findings:

- The City has a **purposeful** commitment to align engagement processes with available resources.
  - The **Engage Policy** states engagement occurs “where appropriate and within The City’s ability to finance and resource”. It also affirms The City’s pledge to allocate sufficient resources for effective engagement within available work plans.
  - The **Engagement Framework** states: “Not every project or decision made by City Council requires large-scale engagement. It is important to assess the need for engagement and choose appropriate engagement strategies, based on project and stakeholder needs. Even when engagement is not required for your project, there are other forums for public comments, such as Standing Policy Committee meetings and Public Hearings of Council.”
- The City has **standardized** tools to support budget determination.
  - The **Engage Assessment Tool** helps to assess needed budget and must be approved prior to moving forward.
  - **Engagement Budget** and **Estimating Tools** are used to prepare budgets, which must be approved, helping ensure engagement methods are financially viable prior to implementation.

- In practice, application of the above tools in case studies assessed in this Review was **ad-hoc**.
  - The LAP Engagement Process Audit noted that planning assessment tools were not approved by the appropriate administrator.
  - Engagement plans indicate the selection of a survey as the engagement tool for Liquor in Parks in Parks was due to budget constraints. Selection of a survey as the best tool for Secondary Suites was based on audience analysis and desired to ensure anonymity of participants.
  - When higher budgets were available, analysis to guide allocation of resources to optimal tools relative to engagement scope did not occur. South Shaganappi LAP and Drought Resilience had relatively large budgets compared with other case studies assessed in this Review. Both used a wide range of methods that did not appear to be based on analysis of costs and benefits, or the scope of engagement. This “shotgun approach” included online workshops, surveys, information sessions, facilitated workshops, pop-up outdoor events, sounding boards, focus groups, and workbooks.
- Interested Parties engaged through this Review indicated that when a lack of planning and prioritization leads to a general engagement rather than precise deployment of “fit for purpose” tools, such as described above, it can lead to engagement fatigue.
- City Staff engaged through this Review noted that available resources are not always well-matched with the scope of engagement that is desired or seen as sufficient. Decisions are made about tactics, marketing, and strategy as informed by available resources within a given department at a given time.

Opportunities for Continuous Improvement:

- Add a matrix to the Engage Framework that links engagement methods to levels of influence (e.g., how a survey differs for “listen and learn” versus “collaborate”) to help teams select the most appropriate tools for each engagement.
- Develop guidance on low- or no-cost engagement strategies for different levels of influence - such as leveraging Community Associations for outreach, using free readability tools, or exploring AI for engagement design and analysis - to maximize impact within budget constraints.
- Provide quick reference examples of “fit-for-purpose” engagement methods for different project types to help teams avoid over- or under-engagement and reduce the risk of engagement fatigue.
- Encourage teams to use free online tools to assess the reading level of background materials to ensure engagement content is accessible and easy to understand for all audiences. For example, “Hemingway Editor”.
- Explore AI tools to support engagement design and analysis - such as automating feedback review, identifying themes, or generating visual summaries - to save time and gain deeper insights from engagement activities.

Benchmark 5: Engagement participants are made aware of how their input will be used as well as other inputs to decision-making.

Why was this benchmark included?

When the public is unclear about how their input will be used - or how it fits alongside other decision-making inputs - it can lead to confusion, mistrust, and dissatisfaction with outcomes. When this benchmark is met, participants understand the role of their input relative to other factors, such as technical studies, legal requirements, or financial constraints. This helps set realistic expectations, supports informed participation, and contributes to greater trust in the engagement process - even when outcomes differ from individual preferences.

Note: This benchmark focuses on the role of engagement relative to other decision-making inputs. Benchmark 1 addresses clarity around which specific decisions are being made.

What practices can be observed when this benchmark is met?

Practices that should be observable to indicate whether this benchmark is met include (but are not limited to) the following:

– Engagement plans explicitly describe the role of participant feedback in the context of other identified inputs to decision-making.

– Information about the role of engagement relative to other inputs to decisions is actively shared with the public and Interested Parties.

– Inputs to decisions other than engagement – such as feasibility studies – are made public in appropriate formats.

How was this benchmark evaluated?

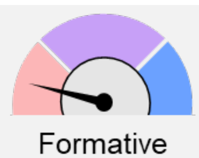
Evaluation of this benchmark drew on the following sources of evidence from this Review:

– Document Review: To assess policies, templates, and tools related to communicating the role of engagement and other decision-making inputs.

– Case Studies: To examine how clearly the role of public input and other decision factors were communicated in practice.

– Engagement and Survey: To understand Calgarians' perceptions on if they understand how their input is used in decision-making.

Maturity Ratings:

Policies		Practice	
	Policies and templates encourage transparency about decision-making inputs, but guidance on how to communicate these inputs to the public is limited.		In practice, clarity on exactly what decisions are to be made, and what level of influence Interested Parties have on decisions is ad-hoc

Findings:

– There is a **purposeful** intent to link engagement to decision making, embedded in **standardized** policy and operational tools.

– The **Engage Policy** states The City's commitment to "share how the input was factored into the decision," and "share with Calgarians and other communities or groups if the input cannot be used in making the decision and the reasoning for why it may not be used."

– The **Engagement Plan Template** requires Project Managers to state:

– What are the decisions to be made, or the outcome that may be influenced by engagement?

– What specific decisions will the engagement be asking for input to help influence?

– The **Content Outline** sets out the minimum level of information that needs to be shared with Interested Parties when conducting engagement. The purpose of the outline is building readiness to engage (e.g. background info). The Engagement Team should be using the Content Outline before setting up the Engage Portal webpage. The Engage Portal webpage is completed with the Communicator and Engage Lead. Examples of information that must be shared with Interested Parties on the Engage Portal, as directed by the Content Outline, include:

– The project decisions will be influenced by public input

– The decisions are outside of the scope of this project / engagement

– Other factors will be considered when making project decisions

  - The commitment that is being made to Interested Parties and the level of engagement they are participating at as well as how their feedback will be used
- The **Engagement Report Back Template – What We Heard**, is used to report back to project teams and Interested Parties after engagement, requires content on who will see and use the input, and whether a decision was made.
- The **Evaluation Template** includes questions on clarity of how feedback will be used to influence decisions, including asking respondents to state whether they agree with the following two statements: “This gave me the chance to provide input on issues or decisions that are important to me,” and “I understand how my input will be used”.

- Planning documents, the Engage portal, and “what we heard” reports describe the broad purpose of engagement but information on what decisions are to be made, the level of influence Interested Parties have on decisions, and other inputs to decisions is **ad-hoc**.
  - Only two case studies assessed in this Review (Foothills Land Annexation and Secondary Suites) clearly state the intended influence level of Interested Parties in their Engagement Plans, using terms from the Engage Policy such as "listen and learn". The Drought Resilience, South Shaganappi LAP, and Liquor in Parks in Parks project are less clear, and do not explicitly reference the terms in the Engage Policy’s spectrum.
  - Only one case studies assessed in this Review (South Shaganappi LAP) describes the roles of Interested Parties on the Engage Portal website, which corresponds to the "listen and learn" category. None of the projects explicitly indicate the level of influence of Interested Parties using the terminology from the Engage Policy’s spectrum on the Engage Portal.
  - Only one case studies assessed in this Review (South Shaganappi LAP) described the roles of Interested Parties in the What we Heard report.
  - The LAP Engagement Process Audit report highlighted participants were informed of their roles and how their feedback would be used.
  - In most case studies assessed in this Review (Drought Resilience, South Shaganappi LAP, and Foothills Land Annexation), Interested Parties were informed through the engage portal that their feedback would be considered against various inputs, such as technical analyses, policies, expertise, or regulations, would influence decision-making. However, for the Liquor in Parks in Parks and Secondary Suites projects, the Engage Portals did not clearly communicate if other inputs were being considered or not.
- Many Interested Parties engaged through this Review, voiced how important it is to clearly communicate the purpose of an engagement and how a decision or project will be impacted.
- 64% of respondents to the Review’s survey indicated that The City is unclear about what decision needs to be made and how their feedback will be used to help make decisions.

Opportunities for Continuous Improvement:

- Clearly communicate the role of public input in relation to other decision-making factors (e.g., technical studies, legal or financial constraints).
- Use consistent language from the Engage Policy to describe levels of influence across all engagement materials.
- Include a standard section on the Engage Portal and in “What We Heard” reports that outlines all key inputs to the decision.
- Provide examples of how public input will be considered in relation to other factors to set realistic expectations.

Benchmark 6: Materials and resources are presented in the language and format most appropriate to the audience, subject matter and focus of engagement.

Why was this benchmark included?

When this benchmark is met, efforts are made to identify the most appropriate language and format for the intended audience. Engagement materials are adapted to meet the needs of diverse audiences, enabling participants to understand the information being presented and supporting more informed and meaningful participation.

Presenting materials in accessible and appropriate formats helps create a more welcoming environment, encourages broader participation, and supports equitable access to information. It also fosters trust and accountability by helping ensure that all Calgarians - regardless of language, literacy level, or ability - can engage with and contribute to public decision-making.

Note: This benchmark focuses on materials that enable participation in engagement (e.g., backgrounders, discussion guides, presentation materials), not materials that report on engagement results or promote participation. These are addressed under Benchmarks 5 and 12.

What practices can be observed when this benchmark is met?

Practices that should be observable to indicate whether this benchmark is met include (but are not limited to) the following:

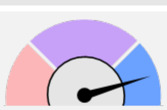
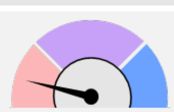
- Analysis of Interested Parties helps determine what language and format is most appropriate for engagement materials.
- Engagement materials are adapted as needed for specific audiences (e.g., translations, plain language, visual aids, large print).
- **Universal Design (UD) principles** are applied to help ensure materials are accessible to a broad range of participants, including those with varying literacy levels and abilities.

How was this benchmark evaluated?

Evaluation of this benchmark drew on the following sources of evidence from this Review:

- Document Review: To assess policies, templates, and tools related to the development and formatting of engagement materials.
- Case Studies: To understand how materials were adapted in practice to meet the needs of different audiences.
- Engagement and Survey: To gather Calgarians' perspectives on whether engagement materials were clear and accessible.

Maturity Ratings:

Policies		Practice	
 Mature	There is a commitment in policies and tools to develop materials that are appropriate for intended participants.	 Formative	The use of audience analysis and application of UD principles - such as plain language - does not appear to be typical practice.

Findings:

- There is a **purposeful** commitment embedded in policies and **standardized** in operational tools to develop materials that are appropriate and meaningful for engagement participants. The focus is on making background information accessible to all audiences rather than tailoring materials to distinct groups. As described in documents reviewed, this primarily means using plain language and translations.
  - The **Engage Policy** indicates context and background information should be provided to help Interested Parties understand issues and options being considered. It further states information provided should be "easily

understood". This is further supported in the **Plain Language Policy and Welcoming Community Policy –** the latter of which recognizes the need to consider needs of newcomers, people of all literacy levels, and people with disabilities in communication.

- The **Engage Framework** indicates commitment to accessible communication in materials, stating: "In order for citizens and stakeholders to provide meaningful input, they need to understand the project. Build this knowledge by sharing the details of the project in plain language, including what has been done so far, why engagement is needed, what is being considered, what are the constraints, and how input is going to be used."
- The **ERU and Communications Tips and Tricks** document encourages use of plain language and key messages.
- The **Inclusive Engagement Guide** – which is referenced in the **Engagement Plan** template – encourages use of universal design (UD) principles, meaning materials should be accessible to all audiences rather than having separate materials for specific audiences. It highlights the need to ensure materials are suitable for people at all literacy levels. The **Corporate Accessibility Policy** provides further details on how to ensure UD principles are followed.
- The **Content Outline Template** outlines the minimum level of information that needs to be shared with Interested Parties when conducting engagement. It promotes plain language and suggests including graphics, maps, charts or diagrams for detailed and technical information.
- Information posted on the **Engage Portal** can be instantly translated into various languages by clicking a button. For example, the South Shaganappi LAP Engage Portal could be translated into 16 different languages. For this feature to be used, it must be set up, and not all engagement may have this translation option.

- Analysis to characterize the audience and guide fit-for-purpose engagement materials and the extent to which materials adhere to UD principles – such as using plain language – is **absent.**
  - Three of five case studies assessed in this Review (Drought Resilience, South Shaganappi LAP, and Secondary Suites) identified the need for clear communication and translation to remove barriers to participation in engagement.
  - Case study engagement materials were assessed to determine reading level using online tool "Hemingway Editor" and KPMG's proprietary generative AI tool Kleo. All engagement materials were determined to be at least at a high school reading level, with some (Secondary Suites and South Shaganappi LAP) at a college level.
  - The LAP Engagement Process Audit found that multilingual materials, multiple communication channels, and alternative formats to reach diverse community groups were used in that process.
  - The practice of translating materials in case studies assessed in this Review was ad hoc and not clearly connected to documented audience analysis.
    - Two of five case studies (South Shaganappi LAP, Secondary Suites) included the ability to auto-generate translations of online materials.
    - One case study (Drought Resilience) provided paper materials in addition to digital, including large print.
  - Interested Parties engaged through ward sessions, the Review's survey, and focus groups with CAs indicated complex language used in tools like surveys was a barrier to understanding and participation.
  - The City's Engage Portal online has capabilities to translate materials into 15 languages.
    - Interested parties engaged through this Review cited examples where tailored formats and materials were used for specific audiences, such as the "Kids Design Streets" project, and the work to engage with racialized and non-English speaking populations in Chinatown.
    - The ERU is doing an Accessibility Audit on their Engage Portal to become more user friendly and accessible.

Opportunities for Continuous Improvement:

- Strengthening the implementation of existing policies, such as using plain language in all engagement materials, to make information more accessible to a wider range of participants.
- Conduct an audience analysis at the start of each engagement to identify when tailored formats - such as translations, large print, or visual aids - are most useful.
- Clarify expectations within the Engage Framework (based on the Inclusive Engagement Guide) about when and how to adapt materials for different audiences to support consistent implementation.
- Establish a review process to assess materials for clarity, accessibility, and alignment with City policies before publication by ERU.
- Use the Engagement Evaluation Template to gather feedback from participants on the clarity and accessibility of engagement materials to provide valuable insights for continuous improvement.

Benchmark 7: Engagement processes intended to be inclusive and accessible offer flexible formats and varied scheduling to accommodate diverse needs.

Why was this benchmark included?

Diverse audiences have a wide range of preferences, availability constraints, abilities, and comfort levels. A one-size-fits-all approach may unintentionally exclude some groups from participating. When this benchmark is met, engagement processes are intentionally designed to accommodate a variety of needs and circumstances, helping to create opportunities for broader and more meaningful participation.

Effort is made to adapt engagement formats and scheduling to reflect the realities of the intended audience. This includes offering multiple ways to participate and considering accessibility features - such as captioning, sign language interpretation, or alternative formats - based on the needs of Interested Parties.

What practices can be observed when this benchmark is met?

Practices that should be observable to indicate whether this benchmark is met include (but are not limited to) the following:

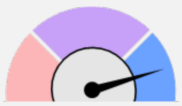
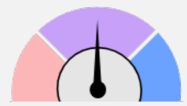
- The range of options for engagement format are appropriate for audience and scope of engagement, such as sessions planned at different times of day and different days of the week in different formats.
- Participation barriers are removed through measures such as enabling phone, text, audio submissions, or sessions that are language-specific, ASL-interpreted or captioned, trauma-informed, and childcare-supported.

How was this benchmark evaluated?

Evaluation of this benchmark drew on the following sources of evidence from this Review:

- Document Review: To assess policies, templates, and guidance related to inclusive engagement formats and scheduling.
- Case Studies: To understand how flexible and accessible engagement formats were implemented in practice.
- Engagement and Survey: To gather perspectives on whether engagement opportunities are accessible and inclusive.

Maturity Ratings:

Policies		Practice	
 Mature	Policies and tools support inclusive engagement and barrier identification but offer limited guidance on applying specific formats.	 Developing	While some inclusive formats were observed, their use varied and was often driven by available resources rather than audience-specific analysis.

Findings:

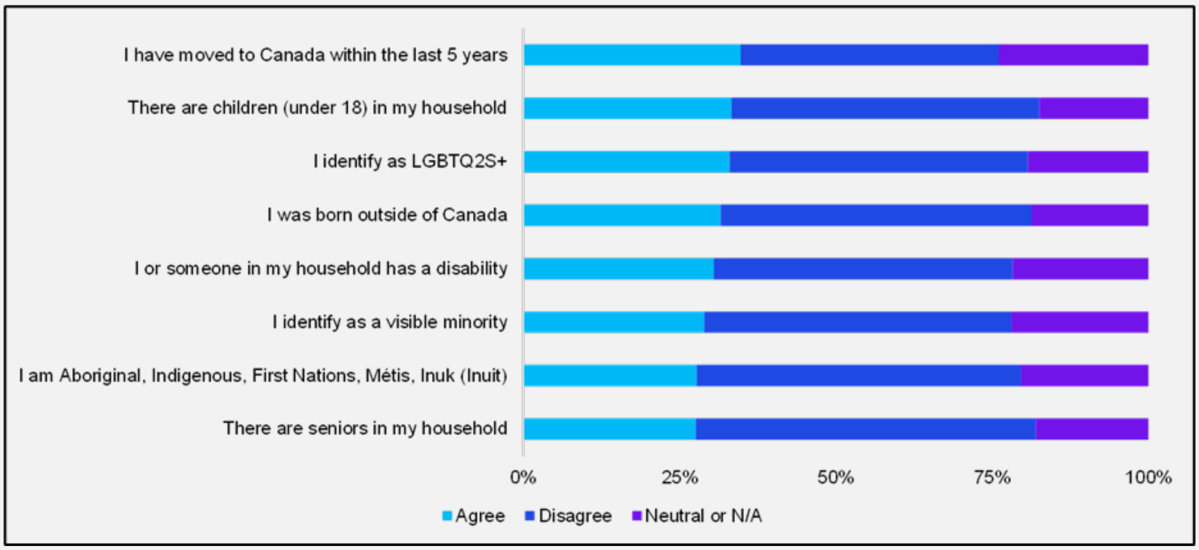
- There is a **purposeful** commitment to tailor engagement formats to remove participation barriers and help ensure inclusion.
  - The **Engage Policy** indicates engagement channels that best suit the audience should be used, and states commitment to Calgarians with diverse needs and backgrounds. Further, the Social Wellbeing Policy states The City will strive to provide equitable services. This includes removing barriers to access and inclusion.
  - The **Inclusive Engagement Guide** calls attention to barriers some groups may face and provides guidance on how to support their participation, such as through language and translation support. This resource states: “The City does its best to reach and hear from all Interested Parties when it comes to making decisions that impact them either directly or indirectly. This includes providing opportunities for Interested Parties to get involved at the beginning of an initiative as well as throughout it and accommodating diversity in engagement.”
- There is a **standardized** approach to assessing barriers to participating in specific engagements.
  - The **Inclusive Engagement Guide** describes the process of accommodating people with diverse circumstances. The guide provides advice on how to address 15 factors that may reduce Interested Parties’ ability to participate fully in engagement processes, such as low literacy, unavailability, disabilities, and socio-economic factors. The **Engage Strategy Template** (required for all engagements) directs Project Managers to this guide and includes a mandatory analysis of “inclusive considerations” and barriers to participation.
  - The **Venue and Events** document takes into account accessibility when considering what location should be used for events. Further, the **Event Planning Guide** template indicates venues must be accessible to people of all mobility needs, and be easy to get to by public transit. It also considers competing priorities of Interested Parties and provide sufficient notice to attend.
- Implementation of operational tools to help support inclusive participation is **guided**. Case studies assessed in this Review suggest a shotgun approach is used within budgetary limits – deploying many options, often with a generic rationale showing a basic value for inclusion rather than based on a determination of whether inclusion is desired and why in the context of the decision to be made, or an analysis of Interested Party needs.
  - None of the case studies reflected a decision point regarding to what extent the engagement process should be inclusive, and why.
  - Processes with sufficient resources tended to offer a range of participation methods to encourage inclusion.
  - Case studies with limited budgets appeared to default to low-cost, primarily online engagement, such as surveys. In at least one case assessed in this Review (Foothills Land Annexation), Interested Party feedback in their Phase 1 What we Heard Report, indicated the engagement format did not meet their needs, although this appears to have been due to the desire of Interested Parties for more influence on the process rather than identified barriers to inclusive participation.
  - Secondary Suites, South Shaganappi LAP and Drought Resilience case studies assessed in this Review, used engagement formats to encourage inclusive participation. Secondary Suites opted for an online-only approach to help ensure anonymity, based on analysis of likely barriers to participation among Interested Parties. The Drought Resilience project included engagement sessions facilitated by Action dignity in 13 languages, advisory groups for distinct populations such as newcomers’ youth, and older adults, and accommodated online, paper, and large print

submissions. South Shaganappi LAP used formats such as direct mail, engagement stations, newsletters, walking tours, community association meetings, and discussions with interested groups as requested.

- The LAP Engagement Process Audit indicated accommodations were provided to enable participation of diverse Interested Parties, including use of multiple communication channels, accessibility accommodations, and targeted outreach. Multilingual materials, support for individuals with disabilities, and non-digital engagement methods were used. Engagement formats included several options, including in-person and virtual engagement sessions, and engagement booklets. Communication included social media and radio advertisements, and signage and posters within the impacted communities. The communication strategy included purposeful strategies to reach varied Interested Parties.

- 29% of respondents to the Review's survey agreed that The City attempts to make it possible for all Calgarians to participate in engagement efforts. Responses from groups that face potential barriers to participation mirrored the general public's opinion, with most demographics close to 29% agreement. Refer to Figure 11 below for the survey results for various demographics.

Figure 11: The City tries to make it possible for all Calgarians to participate in engagement.



Source: Prepared by KPMG on the Review's survey Data.

- Interested parties engaged through this Review frequently voiced support for more diverse, accessible, and welcoming engagement formats. These formats were seen as important to address barriers to attending some engagement events, such as cost, transportation access, time of day, childcare, and cultural traditions.

- Interested parties engaged through this Review identified a need for a more effective youth engagement strategy including aspects such as live music, artistic performances, or TikTok posts.

Opportunities for Continuous Improvement:

- Use the Detailed Participant Table consistently to identify Interested Parties, assess barriers, and plan engagement formats that reflect the needs of each group.
- Building on the opportunities identified in Benchmark 4 to develop guidance for fit-for-purpose engagement strategies, incorporating a Reference Guide within the Engage Framework would help project teams select appropriate formats for different audiences and considerations. By establishing a clear link between audience analysis and format selection, engagement planning can shift from a generalized approach to one that is intentional and responsive to the specific needs of participants.
- Document lessons learned about which engagement formats work best for different audiences to support ongoing improvements and knowledge sharing across teams.
- Pilot new engagement formats - such as youth-friendly events, pop-ups, or creative activities - to reach groups less likely to participate through traditional methods.

Benchmark 8: Information about the engagement process is available, clearly communicated, and accessible to participants in formats appropriate for the audience.

Why was this benchmark included?

Members of the public often report not knowing about engagement opportunities until it's too late. When this benchmark is met, information about upcoming engagement is shared clearly, early, and in accessible formats. This helps Interested Parties make informed choices about participation and reduces the risk of missed opportunities for input.

Note: This benchmark focuses on the marketing and promotion of engagement opportunities, not the materials that enable participation, or the material that report on engagement results. These are addressed under Benchmarks 5 and 12.

What practices can be observed when this benchmark is met?

Practices that should be observable to indicate whether this benchmark is met include (but are not limited to) the following:

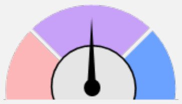
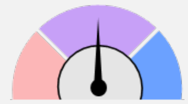
- Marketing of engagement opportunities is tailored based on audience analysis and identification of Interested Parties' needs and preferences, making use of emerging formats and tools to optimize reach.
- Marketing content and format are designed to reach diverse audiences and groups with low participation rates.

How was this benchmark evaluated?

Evaluation of this benchmark drew on the following sources of evidence from this Review:

- Document Review: To assess policies, templates, and tools related to marketing and communication of engagement opportunities.
- Case Studies: To examine how marketing strategies were implemented across different projects.
- The Review's Engagement and Survey: To understand Calgarians' awareness of engagement opportunities and perceptions of communication effectiveness.

Maturity Ratings:

Policies		Practice	
 Developing	Policies and tools support diverse communication strategies, but guidance on how to tailor outreach to specific audiences is limited.	 Developing	A wide range of marketing tactics are used, but awareness remains low, and practices are not consistently informed by Interested Party analysis.

Findings:

– **Standardized** policy and operational tools strive to ensure marketing of engagement supports high participation among those who want to influence decisions and encourage content and format choices that maximize reach to diverse audiences.

- The **Engage Policy** states "The City provides clear, timely and complete information, …. Calgarians and other communities or groups are provided with relevant background and context about the project or work requiring engagement, as well as information about how to participate in the engagement process."
- The **Inclusive Engagement Guide** highlights strategies for marketing to diverse audiences such as using translated materials, visuals, and plain language. Other strategies include making sure advertising is compatible with screen readers, not using colour coded information, and ensuring key information stands out.
- The **Content Outline Template** describes the minimum level of information that needs to be shared when conducting engagement, such as background information, engagement timelines and activities.
- The **Engage Portal** is a one-stop-shop for information about, and providing feedback on, City decisions. Users can translate the webpage, although not links to surveys or attachments

– Case studies assessed in this Review suggest **consistent** deployment of a wide range of marketing practices.

- The LAP Engagement Process Audit report stated communication strategies "effectively promoted inclusivity through multiple communication channels, accessibility accommodations, and targeted outreach. Strengths included multilingual materials, support for individuals with disabilities, and non-digital engagement methods."
- In addition to posting information on the **Engage Portal**, the following tools and strategies listed in Table 8 were deployed in the five case studies used for this Review.

Table 8: Engagement Tools of Case Studies Assessed in this Review

Case Study	Tools
South Shaganappi LAP (Phase 1)	- Engagement booklets mailed directly to all homes and businesses in the area - Engagement stations installed to raise awareness and provide education. (Engagement Stations are areas where community members can pick up engagement booklets.) - Large-format signage - Geo-targeted ads, including Market Mall digital ads and newsletter adds - Translated radio advertisements on Fairchild Radio (a Chinese Canadian multicultural radio network) - English and translated information at Foothills Land Annexation Aquatic Center - Email updates to project subscribers - Communication toolkits to local community associations - Ward Councillors' word of mouth
Foothills Land Annexation	- Letters to landowners and local authorities - Email notifications to subscribers, and Treaty 7 First Nations, and Métis - Digital banner ads - Road signs - Prints advertisements

	- Social media ads - Website posts
Drought Resilience	- Social media on City channels, and posts shared with community groups to share with their networks (Studio Bell, Recreation Centers, Carya (a social impact agency), and the Calgary Zoo) - Signs where water is typically higher - Media releases on CTV, 660 News, CBC Radio and the Calgary Journal, Fairchild radio and Red FM (to reach speakers of Punjabi, Hindi, Mandarin and Cantonese) - Postcards to local garden retailers to hand out to customers - Posters in English and four additional languages - Internal City of Calgary employee communication channels - Newsletters
Liquor in Parks in Parks	- Social media - Emails to individuals who previously booked designated picnic sites
Secondary Suites	- Mall kiosk ads - Website banner ads - Targeted social media ads - Mailer to registered secondary suites - Road signs to targeted communities

Source: Prepared by KPMG based on Case Study Engagement Materials.

- Interested Parties engaged through this Review indicated there is strong public support for continued use of diverse communication channels, including mail drops, radio, documents, emails, and surveys, to ensure widespread reach - meeting people where they are. There were a number of suggestions that more and more diverse communication channels are needed than are typically deployed.
- 19% of respondents to the Review's survey indicated that it is easy to find out how to be heard when The City is seeking input on a decision, compared to 64% that indicated it is not easy enough. Some ward session and Community Association focus group participants from the Review indicated more effort is needed to reach EAL residents, roadside signage needs to be more visible – such as concentrating these in high-traffic areas where there are not visual barriers such as trees – and the Engage Portal needs to be more intuitive, easier to find and navigate – with as few clicks needed as possible. Awareness of the Engage Portal was low among those engaged, indicating there may be opportunity to strengthen marketing of this tool.

Opportunities for Continuous Improvement:

- Conduct consistent audience analysis before engagement to select the most effective marketing channels and formats for reaching different groups.
- Use demographic data (see Benchmark 6) to refine outreach strategies and improve participation among underrepresented groups.
- Continue the Accessibility Audit of the Engage Portal to identify opportunities for ongoing improvements that enhance user experience and ensure easy access to information.

Accountable Follow Up

Good public engagement not only collects input but also closes the loop with those who participated, ensuring they understand how their feedback was heard, considered, and used in decision-making. This transparency builds trust, demonstrates accountability, and helps participants see the impact of their contributions.

Benchmark 9: Engagement participants are kept up to date and informed regarding the decision-making process.

Why was this benchmark included?

When this benchmark is met, participants are informed about the timing and stages of decision-making processes that relate to their input. This includes updates on key milestones, next steps, and how decisions are progressing. Clear and timely communication helps build trust, reduces confusion, and supports public confidence in the engagement process. Without this information, participants may be left uncertain about whether their input was considered or when decisions will be made.

Note: This benchmark focuses on keeping engagement participants informed about the status of the decision-making process. Reporting on the results of engagement, and how public input impacted decisions is addressed in Benchmarks 10 and 12.

What practices can be observed when this benchmark is met?

Practices that should be observable to indicate whether this benchmark is met include (but are not limited to) the following:

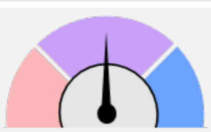
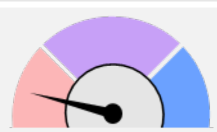
- Up to date information about the process and timing of stages for decisions is publicly available in an easily accessed location.
- Members of the public that participate in engagement can opt in to targeted updates about specific decision-making process

How was this benchmark evaluated?

Evaluation of this benchmark drew on the following sources of evidence from this Review:

- Document Review: To assess policies and templates related to communicating decision-making timelines and updates.
- Case Studies: To examine how decision-making updates were shared with the public.
- The Review's Survey and Engagement: To understand Calgarians' experiences of how they stay informed about engagement and decision-making processes.

Maturity Ratings:

Policies		Practice	
 Developing	Templates and tools include prompts to share decision-making timelines, but expectations for ongoing updates are not clearly defined.	 Formative	Information about decision-making processes is shared inconsistently, often relying on the Engage Portal, with limited proactive communication.

Findings:

- Information sharing processes regarding the decision process are **standardized.**
  - The **Content Outline Template** requires that Interested Parties are provided with the overall project timeline and when decisions will be made and reported back.
  - The **Engage Portal Template** requires publication of relevant information about next steps / next phases.
- Publication of information regarding decision processes was **ad hoc** in case studies assessed in this Review. If it occurs, it is typically through the Engage Portal and sometimes tools like newsletters.
  - The LAP Engagement Process Audit report indicates engagement participants were kept informed about next steps through Engage Summaries, the Engage website, and What We Heard and What We Did reports.

- The South Shaganappi LAP engagement case study assessed in this Review, posted timelines and next steps on the Engage Portal and in What We Heard Reports. They also allowed Interested Parties to subscribe to email updates on decisions and next steps. Other case studies did not appear to publicize clear timelines.

- Calgarians engaged through this Review report that it is not easy to understand the status of engagement processes they are interested in or related decisions. It was suggested by a number of participants that The City relies too much on individuals proactively working to keep themselves informed.
  - For example, Community Association members engaged through this Review reported it is difficult to identify new development applications as they come forward – The City's map-based platform for viewing these is seen as cumbersome to use.
- A number of Interested Parties engaged through this Review reported that the Engage platform is too difficult to navigate and does not make it easy for people to stay informed.
- Only 14% of respondents to the Review's survey indicated that they are satisfied with the way The City shares the results of engagement.

Opportunities for Continuous Improvement:

- Add a standardized "Decision Timeline" section to all Engage Portal project pages to help participants easily track key milestones and next steps.
- Introduce an opt-in feature for participants to follow specific engagements and receive automatic email updates or other notifications to keep interested parties informed about progress and decisions.
- Collect feedback from participants on how they prefer to receive updates to refine communication strategies and improve satisfaction with information sharing.
- Continue the Accessibility Audit of the Engage Portal to identify opportunities for ongoing improvements that enhance user experience and ensure easy access to information.

Benchmark 10: Mechanisms are in place to help ensure commitments made to the public regarding their level of influence on decisions are kept, and/or to ensure a systematic approach for making and transparently communicating decisions to deviate from commitments.

Why was this benchmark included?

When this benchmark is met, The City has mechanisms in place to support decision-makers in upholding the level of influence promised to Interested Parties during engagement. This includes ensuring that commitments are honored in good faith and that any necessary deviations are transparently communicated with a clear rationale. These practices help build trust, reinforce accountability, and support confidence in The City's decision-making processes.

Without clear governance and follow-through, there is a risk that public expectations will be unmet, leading to frustration and reduced trust in future engagement efforts.

Note: This benchmark focuses on honoring engagement commitments. Benchmark 9 addresses communication about the decision-making process, while benchmarks 11 and 12 address reporting on the results of engagement, and how public input impacted decisions.

What practices can be observed when this benchmark is met?

Practices that should be observable to indicate whether this benchmark is met include (but are not limited to) the following:

- Decision makers are identified at the outset of the engagement planning process.

– Governance processes are in place to enable decision makers to be accountable for making sure promises to Interested Parties are kept. For example, documentation to supporting decision-making – such as summaries, briefings, or memos – identifies the level of influence promised to Interested Parties on specific decisions.

How was this benchmark evaluated?

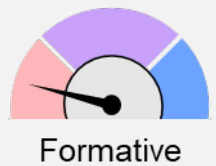
Evaluation of this benchmark drew on the following sources of evidence from this Review:

– Document Review: To assess policies, templates, and tools related to engagement commitments and accountability.

– Case Studies: To examine how engagement promises were tracked, upheld, or adjusted in practice.

– Survey and Community Feedback: To understand public perceptions of whether The City follows through on its engagement commitments.

Maturity Ratings:

Policies		Practice	
	Policies and tools express intent to honor engagement commitments and support feedback loops, but governance mechanisms for accountability are limited.		Engagement commitments are inconsistently tracked and communicated, and decision-makers are not always aware of or held accountable for honoring them.

Findings:

- The City's Engage Policy includes the Spectrum of Strategies and Promises, which a **standardized** framework for how The City will report back to participants at the Consult, Collaborate, and Empower levels.
- The City demonstrates **purposeful** intent to ensure commitments made to the public are honoured.
  - The **Engage Policy** states that The City will "share how the input was factored into the decision" and will "share with Calgarians and other communities or groups if the input cannot be used in making the decision and the reasoning for why it may not be used."
  - The **Engage Framework** indicates understanding of the importance of being accountable for honoring promises due to the impact on trust. It states:
    - "Engagement that is not meaningful will be recognized, and The City will be held accountable […]. This makes it more difficult the next time we need to work with those affected stakeholders."
    - "One of the foundations of a good engagement process is to ensure stakeholders know what you have done with their input. When preparing report backs, The City will tell stakeholders what was heard, how that input influenced the decision, and if it didn't, why not. By ensuring this feedback loop happens, stakeholders will be more inclined to participate in future engagement opportunities. If they know their time and efforts are being respected, we will continue to gain trust and credibility."
- There are **standardized** tools to support feedback loops to Interested Parties regarding how their feedback was used to shape decisions.
  - The **Engagement Report Back Template – What We Heard – What We Did**, outlines that project teams should inform the public about how their input influenced project decisions or, if not, why it was not used.
  - An **Engagement Final Summary Report** template (for internal use) is also available for internal use, guiding project teams to reflect on the outcomes of engagement and how public input was used.
- Mechanisms for holding decision makers accountable to commitments made to Interested Parties are currently **absent**. For instance, planning documents do not consistently identify decision-makers, and documentation used to support decision-making does not specify the level of influence allocated to Interested Parties.

- The Engage Portal for the South Shaganappi LAP, Drought Resilience, and Foothills Land Annexation case studies assessed in this Review, identified Council as the decision-maker, while for Liquor in Parks in Parks, the decision-making authority was attributed to the project team and senior leadership. For Secondary Suites case study, the decision-maker was not clearly identified.
- Only one case study assessed in this Review (South Shaganappi LAP) reminded decision makers of the level of influence Interested Parties were promised in the What we Heard report.
- City staff engaged through this Review report that engagement reporting is inconsistent. It is generally agreed that What we Heard reports are completed, though with varying levels of detail or completeness. Reporting on What we Did appears to be less common, and staff noted there is a clear delineation of responsibility where the What we Did report is expected to fall outside the purview of the ERU.

Opportunities for Continuous Improvement:

- Add a prompt in the Engage Assessment Tool to specify who will make decisions and when to clarify accountability and support more precise engagement planning.
- Engage decision-makers early in the planning process to confirm and align on the appropriate level of public influence to ensure commitments are realistic and consistently upheld.
- Strengthen What We Heard and What We Did templates by including a section that reports on the level of influence promised - and how it was upheld or, if not, why - to improve accountability.
- Provide decision-makers with concise summaries or briefing notes that include the promised level of influence and any implications for decision-making to keep commitments front-of-mind throughout the process.

Benchmark 11: Reporting to the public regarding how the results of engagement were used to inform decisions demonstrates alignment with the intended role of engagement.

Why was this benchmark included?

When this benchmark is met, the public is informed about how their input influenced decisions, and this reporting aligns with the level of influence that was promised during engagement. Clear and consistent reporting builds trust, reinforces accountability, and encourages future participation by demonstrating that public input is valued and taken seriously.

Showcasing specific examples of how public contributions shaped decisions helps reinforce the legitimacy of engagement and fosters deeper trust in The City's processes.

Note: This benchmark focuses on the content included in reporting back to the public on engagement. Keeping participants informed about the status of engagement and decisions, and how public input impacted decisions is addressed in Benchmarks 9 and 12.

What practices can be observed when this benchmark is met?

Practices that should be observable to indicate whether this benchmark is met include (but are not limited to) the following:

- What We Heard reports, records of decisions, verbal communication about decisions, and other communication demonstrate the promised level of influence was honoured. If the level of influence does not match what was promised, this is communicated along with a corresponding rationale.

How was this benchmark evaluated?

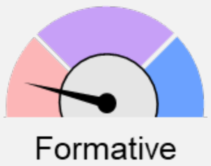
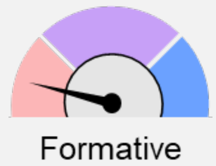
Evaluation of this benchmark drew on the following sources of evidence from this Review:

- Document Review: To assess templates and tools supporting reporting on engagement outcomes.

– Case Studies: To examine how engagement results were communicated and whether they aligned with the promised level of influence.

– Survey and Engagement: To understand perceptions of how well The City communicates the impact of engagement.

Maturity Ratings:

Policies		Practice	
	Standardized tools are available to support consistent reporting, but they do not consistently prompt teams to reflect on whether engagement commitments were upheld.		While reporting on outcomes is common, the extent to which reports demonstrate alignment with promised influence levels varies, and "What We Did" reporting is less frequent than "What We Heard."

Findings:

– There is a **standardized** template available to facilitate consistent reporting of how public input has influenced decisions.

  – The **Engagement Report Back** Template supports project teams in documenting how Interested Parties' feedback informed decision-making. This template provides a structure for linking actions taken or decisions made with input received during engagement.

– While the practice of informing the public about project outcomes is generally **consistent**, the methods used to communicate these outcomes are **ad-hoc**, which can make it difficult for the public to trace how input influenced decisions and reduce transparency.

  – According to ERU data, approximately 59% of projects currently include a What We Did report.

  – Each case study assessed in this Review, demonstrated some form of communication regarding the project's final outcome. For instance, South Shaganappi LAP and Secondary Suites featured What We Did reports, Foothills Land Annexation issued a media release, and Drought Resilience published the Drought Resilience Plan. Communication did not clearly indicate if the promised level of influence was delivered, since many projects did not specify participants' role or report on whether commitments to the public were honoured.

– Public feedback indicated that communication on how The City honored its promises is **absent** in follow up reporting. 80% of respondents to the Review's survey indicated they felt unclear about how decisions are impacted by engagement. 70% reported being unsure about the factors considered during the decision-making process, and 71% of respondents expressed that they felt there were opportunities to improve how the results of decisions are shared to the public.

– Interested Parties engaged through this Review frequently cited the importance of rationale – it is understood that a decision may not be made based on an individual contribution, but many felt that there was no rationale provided for why a decision is made in spite of opposing feedback.

Opportunities for Continuous Improvement:

– Revise the Engagement Report Back Template – What We Heard / What We Did to include a clear reminder of the promised level of influence and how it was fulfilled (or, if not, why) to improve transparency and build trust with participants. Share specific examples of how public input shaped decisions to reinforce the value of engagement and demonstrate its impact. For an example, refer to Appendix F:Engagement in this Review.

– Standardize the use of the Engagement Report Back Template across all projects to support consistent and transparent reporting.

– Collect feedback from participants on the clarity and usefulness of engagement reports to identify areas for improvement and support ongoing enhancements to reporting practices.

Benchmark 12: Reporting to the public regarding how the results of engagement were used to inform decisions is delivered in formats and language reflective of and appropriate for the audiences that were engaged.

Why was this benchmark included?

When this benchmark is met, reports on the results of engagement - such as What We Heard or What We Did reports - are tailored to the needs and preferences of the audiences involved. This includes using accessible language, appropriate reading levels, translations, and visual or non-written formats where needed.

Tailoring reporting materials to the audience helps ensure that participants can understand how their input influenced decisions. When information is accessible and easy to consume, it is more likely to be read, understood, and trusted.

Note: This benchmark focuses on materials that report on the results of engagement. Materials that enable participation in engagement are addressed under Benchmark 5. Additionally, keeping participants informed about the status of engagement and decisions, and how public input impacted decisions is addressed in Benchmarks 9 and 12.

What practices can be observed when this benchmark is met?

Practices that should be observable to indicate whether this benchmark is met include (but are not limited to) the following:

– Audience analysis used to guide the development of appropriate materials (see Benchmark 2) is also used to guide appropriate and effective reporting back to the public after engagement has occurred.

– Post-engagement materials have been adapted for specific audiences (e.g., translations, plain language, visual aids).

How was this benchmark evaluated?

Evaluation of this benchmark drew on the following sources of evidence from this Review:

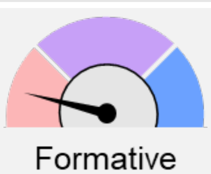
– Document Review: To assess policies and tools related to the accessibility and formatting of post-engagement materials.

– Case Studies: To examine the readability and format of What We Heard and What We Did reports.

– Survey and Community Feedback: To understand public perceptions of how accessible and understandable engagement reporting is.

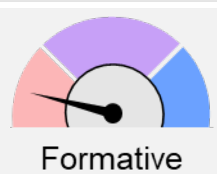
Maturity Ratings:

Policies



While general policies such as the Plain Language Policy support accessibility, there are no specific requirements or guidance for tailoring post-engagement reports to diverse audiences.

Practice



Reports are typically written at a high reading level, with limited use of visuals or alternative formats. Tailoring to audience needs is not evident in practice.

Findings:

– Policies and practices to tailor What We Heard and What We Did reports to diverse audiences are absent. Case Study reports assessed in this Review used written format only. The What We Heard reports from case studies were additionally assessed to determine reading level using online tool “Hemingway Editor” and KPMG’s proprietary generative AI tool Kleo. All reports had a high-school or college reading level. Use of graphics was limited

– Only 20% of respondents to the Review’s survey indicated results of engagement are shared in a way that is easy to understand.

Opportunities for Continuous Improvement:

- Use audience analysis from engagement planning to inform the format and language of post-engagement reports to make results more accessible and relevant to participants.
- Tailor reports to reflect the literacy levels of the intended audience - aim for a Grade 5 reading level as a general guideline - to ensure information is easy to understand.
- Translate reports into the same languages used during engagement and consider visual, audio, or video formats to reach a broader range of participants.
- Standardize expectations for accessible reporting within the Engage Framework and related templates to support consistent and inclusive communication.

Organizational Capacity

Effective public engagement depends on strong organizational capacity - the systems, expertise, and resources that enable engagement to be intentional, accountable, and responsive. Good engagement is planned with clear criteria for where to invest resources, balances engagement and operational expertise, applies the right approvals and protocols, and regularly improves through feedback and measurement.

Benchmark 13: Clear policies and processes guide when public engagement is necessary and how it should be conducted.

Why was this benchmark included?

When this benchmark is met, The City has clear policies and procedures in place to determine when public engagement is required and how it should be carried out. These structures help ensure that engagement is purposeful, consistent, and aligned with decision-making processes. They also support effective oversight, resource allocation, and accountability.

In the absence of clear guidance, engagement efforts may be inconsistent or misaligned with decision-making needs, reducing their effectiveness and undermining public trust.

What practices can be observed when this benchmark is met?

Practices that should be observable to indicate whether this benchmark is met include (but are not limited to) the following:

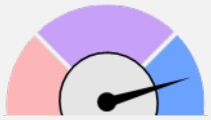
- Established policies detail the decision criteria for public engagement.
- Documented procedures describe how public engagement activities should be carried out, including methodologies for outreach, feedback collection, and post-engagement reporting.

How was this benchmark evaluated?

Evaluation of this benchmark drew on the following sources of evidence from this Review:

- Document Review: To assess the clarity and comprehensiveness of policies and procedures related to engagement.
- Jurisdictional Scan: To compare Calgary’s approach with other municipalities.

Maturity Ratings:

Policies		Practice
 Mature	The City has well-established policies and procedures that provide clear direction on when and how to conduct engagement and is considered a leading practice model by other jurisdictions.	*Not appliable.*

Findings:

- City policies and procedures provide **purposeful** direction on public engagement, including when and how it should be carried out. In fact, jurisdictions contacted to provide input to this Review on leading and innovative practices in some instances declined to participate, because Calgary is considered the leading practice model they use to guide their own policies and procedures.
  - Based on the **Engage Policy**, The City defines engagement as a "purposeful dialogue" between The City and Interested Parties, with the aim of "gathering information and influencing decision-making."
  - The **Engage Policy** further specifies that engagement occurs under the following circumstances:
    - During "specific planning, policy, and project initiatives that directly or indirectly impact [Interested Parties]"; and
    - When "mandated/legislated processes require public participation".
  - The **Engage Framework** offers the following guidance of when it may be necessary to engage with the public:
    - When decisions are open to external input. If decisions have already been finalized and are no longer open to input, public engagement is not appropriate.
    - When Interested Parties are likely to be impacted by the outcomes of the project or initiative.
    - When legislation or regulations mandate the need for public engagement.
    - When prior commitments have been made to Interested Parties.
- The City has implemented a **standardized** stage-gate process to help ensure that public engagement is only conducted in alignment with the Engage Policy.
  - As outlined in the **Engage Framework**, any project with a “direct or indirect impact” on Interested Parties must complete an **Engage Assessment Form**. It is the responsibility of the project manager and the communicator to fill out this form and submit it to the ERU for review. This Review determines whether engagement is required.
- There are **standardized** procedures on how public engagement activities should be conducted.
  - The **Engage Framework** outlines a Six-Step Engagement Process including assessment, planning, storytelling, raising awareness, engaging and reporting and evaluation. The Engage Framework includes high-level description and rationale of each step, and who should take a lead or supporting role for engagement.
- The ERU has 26 tools and templates to standardize and guide the implementation of the engagement process. Six templates are required, while the others are optional. Required templates include the **Engage Assessment, Engage Strategy and Approval, Engagement Plan, What We Heard** (Full and Abridged) and the **Engage Portal Content**. For a list of all the templates refer to Appendix B.

Opportunities for Continuous Improvement:

- Make the criteria for when engagement is required explicit and specific, focusing on ensuring engagement occurs only when specific decisions are open to external input.

Benchmark 14: Roles and responsibilities related to public engagement are clearly defined at all organizational levels.

Why was this benchmark included?

When this benchmark is met, individuals and organizational units involved in public engagement have a clear understanding of their roles and responsibilities. Clear role definition supports effective coordination, improves accountability, and helps ensure that engagement activities are delivered consistently and aligned with decision-making goals.

This benchmark focuses on leadership and internal coordination. It addresses direction-setting and decision-making roles for engagement policy and project-level strategy, rather than operational roles such as logistics or note-taking.

What practices can be observed when this benchmark is met?

Practices that should be observable to indicate whether this benchmark is met include (but are not limited to) the following:

– Role and job descriptions indicate who is responsible for the results of engagement.

– Organizational structures are appropriate to enable desired results and effective accountability.

– There is a shared understanding at an organizational level regarding who is responsible for the results of engagement and the consequences of not achieving results.

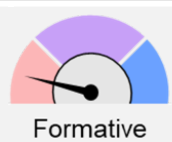
How was this benchmark evaluated?

Evaluation of this benchmark drew on the following sources of evidence from this Review:

– Document Review: To assess how roles and responsibilities are defined in policies and frameworks.

– Engagement: To understand how roles are understood and applied in practice.

Maturity Ratings:

Policies		Practice	
	The Engage Policy and Framework define roles and responsibilities, but do not fully clarify accountability for engagement outcomes across all levels.		In practice, roles are sometimes unclear or inconsistently applied, and the ERU is often perceived as solely responsible for engagement outcomes, despite limited authority to enforce adherence.

Findings:

– The City's Engage Policy and Engage Framework **guides** the roles and responsibilities of all participants involved in engagement activities as seen in Table 9.

Table 9: Roles and Responsibilities for Engagement

Groups	Roles and Responsibilities
Customer Service & Communications [ERU]	- Maintain and update the Engage Administration Framework (processes, tools, training, data archives). - Provide internal training on the Engage Policy and Framework; develop and deliver engagement training citywide. - Advise on engagement process design and steward consistent application across The City. - Coordinate and align engagement activities, standards, and practices across The City. - Support Council, Administration, civic partners, and communities with engagement expertise.

	- Partner with Project Managers and Communicators to develop project engagement strategies. - Manage logistics for engagement activities (e.g., venues, volunteers, online tools). - Analyze input from in-person and online engagement activities.
Communicators	- Complete the Engage Assessment. - Collaborate with ERU to develop the Project Engage strategy. - Support all stages of engagement. - Lead Step 4 to Raise Awareness.
Project Managers	- Complete the Engage Assessment. - Collaborate with ERU to develop the Project Engage strategy. - Support all stages of engagement.
Project Sponsor / Director / General Manager	- Approve the Engage Strategy as appropriate. - Report to Council/Administration.

Source: Prepared by KPMG based on the Engage Policy and Engage Framework.

– A shared understanding on who holds responsibility for engagement outcomes appears to be **ad-hoc**.

  – ERU and staff engagement sessions indicated that the division of roles among ERU and project teams can vary between projects, though some reported that roles are well-understood.

– Interested Parties engaged through this Review identified several areas where roles may not be clear on a given project, including the Engage Strategy, incorporating technical expertise, leveraging relationships to support engagement, and reporting What we Did.

Opportunities for Continuous Improvement:

– Develop a RACI matrix (Responsible, Accountable, Consulted, Informed) in the Engage Framework to clarify the roles and responsibilities of the ERU and associated teams. This tool would help clarify the lines of accountability and support improved role definition and coordination across engagement activities.

Benchmark 15: Appropriate experts (e.g., public engagement specialists, subject matter experts) are available and embedded in public engagement design, delivery and reporting to ensure effectiveness.

Why was this benchmark included?

When this benchmark is met, qualified experts - such as public engagement specialists and subject matter experts - are involved throughout the engagement process. Their expertise supports the design of high-quality engagement plans, effective delivery, and clear, credible reporting. This helps ensure that engagement is meaningful, aligned with best practices, and produces results that are useful to decision-makers and trusted by participants.

Public engagement specialists bring knowledge of effective methods and tools, while subject matter experts help ensure that content is accurate, relevant, and context specific. Together, they contribute to more thoughtful, informed, and impactful engagement.

What practices can be observed when this benchmark is met?

Practices that should be observable to indicate whether this benchmark is met include (but are not limited to) the following:

– Engagement specialists lead engagement planning efforts.

– For high-risk or high-impact projects, engagement specialists take the lead on engagement planning, delivery, and reporting processes.

– When engaging with technically or operationally focused audiences, subject matter experts play an active role in crafting engagement materials and attending engagement sessions to help ensure they are practically relevant and context specific.

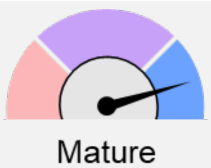
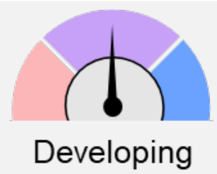
How was this benchmark evaluated?

Evaluation of this benchmark drew on the following sources of evidence from this Review:

– Document Review: To assess policies and frameworks outlining the roles of engagement and subject matter experts.

– Engagement: To understand how City staff perceive the roles and responsibilities.

Maturity Ratings:

Policies		**Practice**	
	The Engage Policy and Framework establish the role of engagement specialists and subject matter experts.		In practice, roles between engagement specialists and subject matter experts varies depending on departmental practices and project scope.

Findings:

– There is a **purposeful** commitment embedded in the **Engage Policy** and standardized in the **Engage Framework** to incorporate engagement specialists into engagement activities. These specialists are primarily responsible for developing and maintaining the tools and processes that support implementation of the Engage policy. They provide guidance, resources, and expert advice to project teams.

  – The **Engage Policy** defines the role of the Customer Service & Communications Division, which includes the ERU, as leading the development and standardization of process and practices of engagement at The City. For example:

    – "Customer Service & Communications is responsible for the development and maintenance of the Engage Administration Framework, including The City's processes, tools, training and data archives with respect to engagement."

    – Additionally, according to the Engage Policy the ERU must "advocate for, coordinate, and link engagement activities, standards and practices across The City".

  – The **Engage Framework** standardizes the role of engagement specialists in engagement design and delivery. For example:

    – The Framework delineates leadership and support responsibilities for every phase of engagement. The ERU is assigned as the primary lead for most engagement phases, offering strategic direction, resources, and structure to guide the process. Subject matter experts provide support to help ensure engagement is contextually relevant. For example, the Framework states: "The ERU will work with the project manager and communicator to develop an engagement strategy and plan."

    – Additionally, the ERU is identified as a central support resource available throughout engagement efforts. The Framework specifies that: "The ERU is available anytime for support and consultation." Furthermore, consistent training is emphasized, as it outlines that: "Training on the Framework and Tools will be provided to communicators, project managers and project sponsors on an ongoing basis to support them in their engagement efforts."

– Engagement with City staff during this Review indicated the role of the ERU in practice is **ad-hoc.** A number of engagements occur without the involvement of the ERU, whether because of availability, preference, or even a lack of knowledge of the ERU's role and processes. It was reported that some departments routinely contract out engagement projects without involvement of the ERU. Small engagements or projects focused on existing department relationships may also not be seen as needing support from the ERU.

Opportunities for Continuous Improvement:

– Strengthen expectations for ERU involvement in the Engage Framework. Promote awareness of the ERU's role and services across departments to encourage earlier and more consistent collaboration, making it easier for teams to access support when needed.

– Standardize the identification of technical audiences and require subject matter expert participation in relevant engagement activities to make engagement more contextually relevant and effective.

Benchmark 16: Accountability mechanisms are in place to help ensure staff adhere to established public engagement policies, and processes.

Why was this benchmark included?

When this benchmark is met, systems and structures are in place to help ensure that staff consistently follow The City's public engagement policies, processes, and standards. These mechanisms support consistency, quality, and transparency in engagement practices, and provide a foundation for oversight and continuous improvement.

Clear accountability also helps ensure that engagement is not only well-intentioned but also well-executed, reinforcing public trust in The City's commitment to meaningful engagement.

Note: This benchmark focuses on the assurance framework for engagement. Benchmark 14 addresses the delegation of roles and responsibilities, while Benchmark 19 focuses on performance measurement and reporting.

What practices can be observed when this benchmark is met?

Practices that should be observable to indicate whether this benchmark is met include (but are not limited to) the following:

– It is clear in public engagement policies and procedures what activities are mandatory, and which are recommended / optional.

– The intended results of public engagement policies and procedures are clear.

– Clear process and lines of accountability are in place to promote and provide assurance of results.

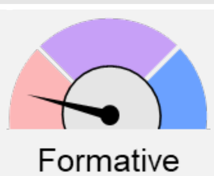
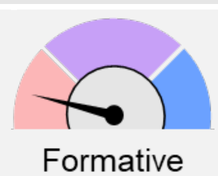
How was this benchmark evaluated?

Evaluation of this benchmark drew on the following sources of evidence from this Review:

– Document Review: To assess how policies and frameworks define mandatory activities and accountability structures.

– Engagement: To understand how engagement responsibilities and expectations are managed.

Maturity Ratings:

Policies		Practice	
	The Engage Policy and Framework outline roles and responsibilities, but do not clearly distinguish between mandatory and optional activities or include mechanisms to monitor compliance.		In practice, staff have considerable discretion in applying engagement tools and templates, and there is limited oversight to ensure consistency or adherence to standards.

Findings:

- Instructions regarding which public engagement activities are required versus optional are **formative**. Currently the only instructions are embedded within templates. There does not appear to be reference to which activities are mandatory in broader tools, such as the **Engage Framework.**
- Lines of accountability for public engagement practices and results are **developing**.
  - The **Engage Policy** identifies accountability for four key engagement functions

Table 10: Accountability Roles for Engagement Groups

Groups	Roles and Responsibilities
Council	- Stewardship of the Engage Policy
City Manager, General Managers (and / or designates)	- Adherence to the Engage Policy - Stewardship of the Engage Administration Framework
Project Managers, Work Leads	- Correct and thorough completion of The City's engagement processes, as directed in the Engage Administration Framework
Customer Service & Communications [ERU]	- Development and maintenance of the Engage Administration Framework, including The City's processes, tools, training and data archives with respect to engagement.

Source: Prepared by KPMG based on the Engage Policy.

  - The **Engage Framework** specifies the appropriate approver for the Engage Strategy and budget for a particular engagement project, depending on the engagement's complexity and impact, and clarifies lead and support roles for engagement activities.
- In practice, engagement with City staff during this Review highlights that departments and ERU staff have considerable discretion as to the application of available tools and templates within the Engage Framework. Aside from department sign-off of the Strategy for a project, no consistent controls or accountability mechanisms were reported to support compliance or consistency.

Opportunities for Continuous Improvement:

- Enhance the Engage Framework to clearly distinguish between mandatory and optional engagement activities.
- Introduce structured project audits to assess adherence to engagement principles and identify areas for improvement to support ongoing quality assurance and learning.
- Clarify roles and responsibilities for accountability, including how and when oversight should occur during the engagement lifecycle, to strengthen lines of accountability and support effective implementation.
- Provide training or guidance on accountability mechanisms to help staff understand expectations and apply engagement policies and processes consistently.

Benchmark 17: Public engagement policies and practices undergo continuous improvement, informed by research and feedback collected from the public, Interested Parties and decision-makers.

Why was this benchmark included?

When this benchmark is met, public engagement policies and practices are regularly reviewed and refined based on feedback from residents, decision-makers, and other Interested Parties, as well as research on emerging and leading practices. This helps ensure that engagement remains relevant, effective, and responsive to evolving community needs and expectations.

As public preferences shift due to cultural, generational, and technological changes, a commitment to continuous improvement helps The City stay aligned with best practices and maintain meaningful, inclusive engagement.

What practices can be observed when this benchmark is met?

Practices that should be observable to indicate whether this benchmark is met include (but are not limited to) the following:

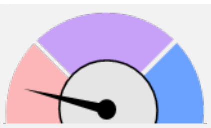
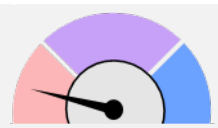
- Routine reviews of public engagement policies and practices have occurred.
- Reviews of public engagement policies and practices helped identify changes needed as a result of new leading practices, emerging and innovative practices, trends in demographics and/or technology, and feedback.

How was this benchmark evaluated?

Evaluation of this benchmark drew on the following sources of evidence from this Review:

- Document Review: To assess the frequency and scope of policy and practice reviews.
- Survey and Engagement: To understand perceptions of how well The City responds to feedback and adapts its engagement practices, and to gather insights into internal processes for learning and improvement.

Maturity Ratings:

Policies		Practice	
 Formative	The City has undertaken periodic reviews and research on engagement practices, but lacks a formalized, ongoing process for continuous improvement.	 Formative	While some post-engagement debriefs and research activities occur, there is no consistent mechanism for tracking, aggregating, or applying lessons learned across projects.

Findings:

- Reviews of The City's public engagement policies and practices have been conducted on an **ad hoc** basis in the past.
  - The **Engage Policy**, established in 2003, has undergone multiple revisions, including in 2010, 2013, 2016, and most recently in 2023.
  - The ERU completed an "**Engage Gap Analysis**", performing a SWOT against each stage of engagement, and identifying key areas of improvement.
- **Ad-hoc** research is carried out on leading and innovative engagement practices.
  - In May 2025, the ERU completed the **Engage Municipal Scan**, which researched the public engagement policies of other municipalities (Edmonton, Winnipeg, Toronto, Vancouver, Ottawa, Red Deer, Lethbridge, Airdrie) and the Federal Government.
  - ERU engagement reported that staff often take on projects to investigate or improve aspects of practice.
- 74% of the Review's survey participants indicated that The City could improve its responsiveness to public feedback on engagement processes.
- Interested Party engagement conducted through this Review suggested that there are few platforms for external feedback or advice on engagement practice or policy. Individual projects may include a feedback mechanism, but no ongoing external mechanisms were reported, and no systematic way of gathering or tracking improvement feedback was observed.

– Staff engaged through this Review, report that engagements are often followed by a debrief or other reflective exercise. These exercises may include staff from multiple departments or may be conducted internally by the ERU to learn from a project.

Opportunities for Continuous Improvement:

- Establish a regular review cycle for public engagement policies, tools, and practices, informed by internal evaluations and external feedback.
- Create a centralized mechanism to collect, track, and analyze feedback from residents, staff, and decision-makers on engagement processes.
- Document how feedback and research findings are used to inform updates.
- Explore opportunities to formalize post-engagement debriefs and integrate findings into broader organizational learning.

Benchmark 18: Diverse populations and historically marginalized groups contribute to the development and continuous improvement of public engagement policies, services and processes.

Why was this benchmark included?

When this benchmark is met, diverse and historically marginalized groups are meaningfully involved in shaping and improving public engagement policies and processes. Their perspectives help identify barriers, improve accessibility, and strengthen the relevance and effectiveness of engagement approaches. This contributes to more equitable participation and builds trust over time.

What practices can be observed when this benchmark is met?

Practices that should be observable to indicate whether this benchmark is met include (but are not limited to) the following:

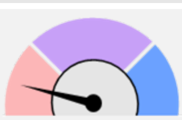
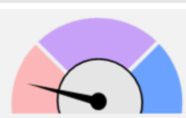
- Historically marginalized groups are actively involved in continuous improvement of engagement approaches.

How was this benchmark evaluated?

Evaluation of this benchmark drew on the following sources of evidence from this Review:

- Document Review: To assess whether policies or tools support the involvement of historically marginalized groups in engagement development and improvement.

Maturity Ratings:

Policies		Practice	
 Formative	A systematic approach to involving historically marginalized groups in engagement development is not yet in place.	 Formative	There is no consistent evidence that these groups are engaged in the continuous improvement of engagement policies or processes.

Findings:

- While some informal feedback may be received from Interested Parties in the course of an individual engagement, a systematic approach to engaging historically marginalized populations in development and continuous improvement of public engagement policies, services and processes is currently absent.
- Evidence sources for this Review did not indicate whether Interested Parties are satisfied with the role they play in development and continuous improvement of public engagement policies, services and processes.

Opportunities for Continuous Improvement:
– Create a feedback loop with historically marginalized groups to inform engagement policy and tool development. – Integrate equity-focused questions into post-engagement evaluations to gather valuable insights from underrepresented participants and identify barriers or opportunities for improvement. – Schedule regular reviews that include input from diverse communities to support ongoing updates to engagement practices and ensure they remain responsive to changing needs. – Pilot co-design sessions with community partners to test and refine engagement tools and approaches while building trust and shared ownership.

Benchmark 19: Key Performance Indicators (KPIs) are established, and regular performance measurement of public engagement processes at an organizational level is occurring.

Why was this benchmark included?

When this benchmark is met, The City defines and tracks clear measures of success to evaluate how well public engagement practices are meeting their intended goals. These indicators - such as participation rates, satisfaction levels, and inclusivity - help identify what is working well and where improvements are needed. Regular performance measurement supports transparency, informs continuous improvement, and helps ensure that engagement strategies are effective, inclusive, and aligned with community expectations.

What practices can be observed when this benchmark is met?

Practices that should be observable to indicate whether this benchmark is met include (but are not limited to) the following:

– KPIs related to public engagement activities, such as participation rates, satisfaction levels, and outcomes, are defined and documented.

– There is a process to collect data and analyze the performance relative to KPIs.

– Results of KPI analysis inform continuous improvement of engagement strategies, designs, plans and implementation.

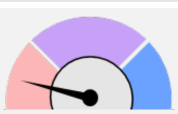
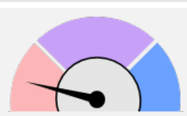
– KPIs provide meaningful information to planners and decision makers.

How was this benchmark evaluated?

Evaluation of this benchmark drew on the following sources of evidence from this Review:

– Document Review: To assess the presence of defined KPIs and performance measurement processes.

Maturity Ratings:

Policies		Practice	
 Formative	While some tools and templates include basic indicators, formal KPIs for public engagement are not yet established at the organizational level.	 Formative	Performance measurement is limited and inconsistent, with few examples of KPI data being used to inform continuous improvement.

Findings:

– Formal KPIs related to public engagement activities are **absent** and are not used to inform continuous improvement.

- Currently, The City does not have defined KPIs for evaluating the success of public engagement processes. The LAP Engagement Process Audit confirmed this gap, recommending KPIs be developed for various essential areas such as reach, inclusivity, responsiveness to feedback, and participant satisfaction.
- Measurement of engagement effectiveness is currently limited to participant satisfaction surveys; however, evidence does not indicate these are consistently used. These reflect output-focused measures rather than comprehensive indicators of engagement quality, diversity, or inclusivity.

– Informal KPIs provide an **ad-hoc** foundation for development of measures in the future.

- The **Engagement Plan Template** includes "indicators of successful engagement" such as completion of engagement activities, and publication of What We Heard and What We Did reports.
- The **Evaluation Summary Template** aggregates participant feedback to calculate satisfaction levels and demographic data, offering the potential for baseline KPI development.
- Specialized tools, such as the **Cost-Effort Estimator,** provide insight into resource allocation for engagement activities.

Opportunities for Continuous Improvement:

- Establish a set of core KPIs for public engagement at the organizational level (e.g. satisfaction, influence clarity, follow-up reporting).
- Complement organizational KPIs with project-specific indicators tailored to the scope and objectives of individual engagements.
- Standardize the use of the Evaluation Template across all projects to support consistent data collection and performance tracking.
- Develop a centralized process for aggregating and analyzing KPI data to inform continuous improvement and strategic planning.

Benchmark 20: Participation rates of various demographic populations in public engagement activities are tracked and reported to demonstrate the extent to which the intended audiences were actually engaged.

Why was this benchmark included?

When this benchmark is met, those responsible for developing engagement policies, systems, and approaches have accurate and reliable data and analytics to help identify which populations are typically underrepresented in providing input to decisions and trends over time. This data helps evaluate and strengthen the performance of strategies intended to engage such groups and enables transparent and accountable reporting regarding the inclusiveness of engagement.

Note: This is different from statistical sampling or research: the intention is not to confirm the reliability or validity of findings or establish evidence-based policy recommendations.

What practices can be observed when this benchmark is met?

Practices that should be observable to indicate whether this benchmark is met include (but are not limited to) the following:

- Participation rates are documented and include demographic breakdown that is sufficiently detailed to enable analysis of which groups require more support to participate.
- Data and reporting are used to strengthen engagement strategies and provide accountability to key groups, and not as a means of establishing statistical significance or validity of engagement feedback.

How was this benchmark evaluated?

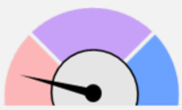
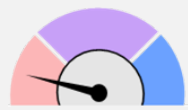
Evaluation of this benchmark drew on the following sources of evidence from this Review:

– Document Review: To assess policies and tools related to participation tracking and demographic data collection.

– Case Studies: To examine how participation and demographic data were collected and used in practice.

– Public Engagement Working Group: To gather perspectives on the practicalities and challenges of tracking demographic data in engagement activities.

Maturity Ratings:

Policies	Practice
 Formative — Tools exist to support demographic data collection, but standards for use and analysis are unclear.	 Formative — Participation rates are tracked, but demographic data is inconsistently collected and used to inform strategy or reporting.

Findings:

– Overall participation rates are regularly **tracked**, but collection of demographic data is largely **absent.**

- Evaluation indicators suggested by the **Inclusive Engagement Guide** include diversity of participants, such as racialized persons, foreign-born people, physical mobility challenges, hearing and/or vision impairments, cultural background); and geographic location of residence, such as by postal code.
- If such information were collected, through the standard evaluation form, it is possible to sort evaluation results to see satisfaction levels by tracked demographics.
- All case study engagements assessed in this Review tracked participation rates, but only one included any demographic parameters: South Shaganappi LAP, which gathered data on age and geography.
- The LAP Engagement Process Audit found KPIs for evaluating engagement success needed to be improved, stating: “there was no measurable targets for participant diversity, response rates, or satisfaction benchmarks…[the] lack of targets for participant satisfaction and diversity may also result in gaps in community representation, engagement fatigue, or reduced public trust.” The audit recommended specific and measurable targets for engagement reach and diversity. City staff are currently exploring next steps.

– The Public Engagement Working Group engaged through this Review, highlighted that, while it can be important to track demographics where practical – such as online surveys – requiring or even asking people to self-identify at other engagement venues makes engagement less welcoming, and can be a barrier to participation. They noted that this is a complex issue related to safety and representation for under-represented groups, and individuals may or may not choose to self-identify. Relationships within under-represented communities were suggested as a means to create opportunities for safe engagement and self-identification.

Opportunities for Continuous Improvement:

– Clarifying the policy / approach for:

- Documenting participation rates, ensuring demographic breakdown is sufficiently detailed to enable analysis of which groups require more support to participate.
- Using this data to strengthen engagement strategies and provide accountability to key groups.

– There is an opportunity to revisit the demographic categories currently used for participation data collection. These categories might not be applicable to every engagement. A longer reference list could be created with standard definitions for core demographic categories and subcategories. Project teams could then select the most relevant demographics for each engagement. For instance, an engagement process focused on playgrounds may require different demographic parameters compared to one related to zoning. This approach would allow for more flexibility and relevance at the project level while maintaining consistent terminology for engagement-wide analysis.

Appendix F: Engagement in this Review

As part of this Review, Interested Parties were engaged to validate and expand findings from document review and case studies. While no engagement process is perfect, KPMG's approach was guided by a commitment to application of leading practices. Engagement was intentionally designed to model elements identified in the section of this report titled "What is 'good' public engagement?"

Clear Strategy

At the outset of the Review, the scope of Interested Party engagement was identified, as shown in Table 11.

Table 11: Modelling Good Engagement – Clear Strategy

What decisions will be made?	– What standards should public engagement be held to in The City to ensure transparency, accountability, and excellence? – What changes should be made to the current approach for public engagement in The City to ensure standards are met going forward?
Who will make these decisions?	Executive Leadership Team (ELT)
The Promise *See Fig. 4*	Consult: "We will keep [the public] informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision." (IAP2 Spectrum of Public Participation)

Source: Prepared by KPMG.

The Strategy also included an initial analysis of Interested Parties, with information about who would be engaged, their current level of awareness of the Review, and possible tactics.

Appropriate Tactics

To support the Review, engagement planning affirmed the strategic elements above and outlined tactics to be used. This included:

- Further analysis of who would be engaged, and why;
- What specific information would be helpful to hear about from each audience, recognizing their diverse perspectives and interests relative to the Review;
- Overarching principles to guide all engagement;
- Specific details about how and when each audience would be engaged;
- How to close the loop with each audience to help foster awareness of how feedback was understood and used; and
- The approach for communication.

Four key messages were included to help ensure consistent communication aligned with the scope of engagement as described in the Strategy. One stated: "[we] welcome your feedback, experiences, and ideas about public engagement by The City. Feedback from Calgarians will help us to advise City on how public engagement can be improved. We are also reviewing research and other evidence to understand the ways that The City's current approach is and isn't working well."

Accountable Follow-Up

Calgarians' perspectives, gathered through engagement, were **listened to and acknowledged** in the Findings and Recommendations – fulfilling the promise made at the outset of the Review.

Through public engagement conducted during This Review, the following key themes were heard from Calgarians:

- **Calgarians want engagement to have a clear purpose, and to understand the decisions at stake**. Many are frustrated by processes that feel reactive or predetermined. Survey results reflect this: 64% of respondents said The City is not clear about decisions or how input will be used. Clear communication about objectives - what decisions need to be made and how feedback will influence outcomes - is needed.
- **Tactics should reflect the audience.** What works for one group may not work well for others. Groups needing special consideration include youth, seniors, newcomers, Indigenous communities, and non-English speakers. Survey findings show 54% of respondents do not agree The City makes it possible for all Calgarians to participate. Analysis is needed to determine the needed mix of short, focused sessions, open houses, small-group or one-on-one meetings, structured agendas, interactive dialogue, and the presence of subject-matter experts to answer questions.
- **Calgarians want to see how their input influences decisions, with stronger follow-up and timely updates**. When decisions diverge from public input, Calgarians expect to know why. Many expressed disappointment with past engagements that felt like "check-box" exercises. Survey results highlight this concern: 72% disagreed that The City tries to understand what people need before making decisions, and 67% disagreed that their perspectives are considered. Participants expect clear, traceable links between feedback and outcomes, including reasons when input is not used. There is a clear expectation for accountability and respect for participants' time and contributions.
- **Trust and relationship-building are a priority**. Many Calgarians perceive engagement as performative, undermining confidence in the democratic process. Calgarians want honest dialogue, transparency about limitations, and evidence that voices matter. Most (74%) respondents to a public survey done through this Review reported The City does not listen to feedback about improving engagement, and 77% do not trust the engagement process. Trust depends on showing that engagement is genuine and that public input makes a difference.

These perspectives were acknowledged in the development of Findings and Recommendations, alongside findings from leading-practice research, document review, and case studies. The need for tailored tactics, a more programmatic approach to linking engagement to decisions, and relationship stewardship also emerged strongly in case studies and engagement with internal Interested Parties. These areas of convergence helped identify these issues as being priorities for change.

Table 12 shows how the major themes from public engagement are acknowledged in the Findings and Recommendations:

Table 12: Public Engagement Themes Mapped to Findings and Recommendations

Public Engagement Theme	Findings	Recommendations
Calgarians want engagement to have a clear purpose and to understand the decisions at stake.	Many engagement processes have overly broad aims and are not tied to specific decisions. This makes it challenging for the public to understand how their feedback was used. (Finding 2)	All engagement should be tied to specific decisions. Reports back to the public should close the loop by letting them know how their input was used to influence specific decisions. (Actions 2.1, 2.2, 3.1)
Tactics should reflect the audience.	Engagement tactics don't appear to be selected based on analysis of the anticipated audience – factors such as what is affordable within budget are more weighty. (Finding 2)	Tactics should be selected based on analysis who will be engaged, including what is already known about their perspectives, their preferences, and needs. (Action 4.1)
Calgarians want to see how their input influences decisions, with stronger	Reporting back to the public about how their feedback was used is optional for Project Managers. Even when such reporting occurs, the absence of defined,	"What We Did" reports should be mandatory and provide accountable feedback to the public regarding how their

Public Engagement Theme	Findings	Recommendations
follow-up and timely updates.	specific decisions as the focus of engagement makes it challenging for City staff to report back to the public on how public input helped shape specific choices. (Finding 2)	feedback was used to inform decisions. (Action 2.2)
Trust and relationship-building are a priority.	The interdependence between ongoing relationship management and engagement is not currently recognized or managed. (Finding 3)	The City should formally recognize and proactively manage the dependency between strong relationship management and effective engagement and provide the needed oversight to optimize the symbiosis between these key functions. (Action 5.1, 5.2, 5.3)

Source: Prepared by KPMG.

Next Steps

This Review was carried out to support specific decisions to be made by Council. As the decision process unfolds, it will be important to:

- **Make sure Council understands the promise** that was made to Calgarians regarding how their feedback would be used, **and how Calgarians' feedback was acknowledged** in the findings and recommendations of this Review.

  It is important to contextualize the promise in comparison to other possible levels of public involvement that were not promised – such as "we will implement what you decide".

- Let Calgarians know their perspectives were **listened to and acknowledged**, in keeping with the promises made to them. This means:

  - Communicating back to Calgarians what was heard and acknowledged.
  - Telling Calgarians how their perspectives were heard and acknowledged by decision makers.
  - Telling Calgarians what decisions were made and thanking them for their role in the process.

  Follow up should be tailored to group rather than using a blanket approach: in particular, feedback to CA and Working Group members, who were engaged through their own processes, should receive direct follow up that is distinct from broad communication back to the general public.