

# 2.0 TEMPLATES

## 2.1 PUBLIC ENGAGEMENT POLICY TEMPLATE

\*See [Public Engagement Guide Section 3.1](#) for sample policy content.

[insert municipality name] **PUBLIC ENGAGEMENT POLICY**

### I. POLICY STATEMENT

[Provide a description of why you do public engagement and the value that it adds to the work of your municipality].

Enter description here...

### II. PUBLIC ENGAGEMENT PRINCIPLES

[Describe what you hope to see or experience as part of good public engagement].

Enter description here...

### III. DEFINITIONS

[Identify how you define public engagement and other terms related to your public engagement system].

“\_\_\_\_\_” means the chief administrative officer of the Municipality or their delegate.

“Stakeholders” means [see [Public Engagement Guide Glossary](#) section for sample definition].

“Municipality” means the \_\_\_\_\_

“Public Engagement” means [see [Public Engagement Guide Section 3.1](#) for sample definition].

### IV. POLICY RESPONSIBILITIES

[Identify relevant roles and staff positions with accountability for planning, implementing, reporting, evaluating, and making decisions related to public engagement; see [Public Engagement Guide Section 3.1](#) for sample].

#### 1. Council Responsibilities

Council shall:

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#### 2. Administration Responsibilities [insert title of position responsible for public engagement]

Administration shall:

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## 2.0 TEMPLATES

### V. PUBLIC ENGAGEMENT CIRCUMSTANCES

*[Identify the situations in which you would use public engagement (e.g., to add, change, or discontinue a program(s), service(s), policy, and/or initiative); See [Public Engagement Guide Section 3.1](#) for sample circumstances].*

Public engagement will be applied to decision-making processes that support:

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### VI. PUBLIC ENGAGEMENT APPROACHES

*[Identify the different ways the public can play a role in your decision-making processes; See [Public Engagement Guide Section 3.1](#) for Sample Approaches].*

Public engagement approaches to support decision-making will include:

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### VII. POLICY EXPECTATIONS

**Legislative and Policy Implications** *[List relevant legislation, for example: Municipal Government Act (MGA), Alberta Freedom of Information and Privacy Protection Act (FOIP), Alberta Personal Information Protection Act and/or implications for existing municipal policies (i.e., employee conduct, security, safe workplace, technology use, communication protocols, etc.).]*

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### VIII. [OPTIONAL] PUBLIC ENGAGEMENT PLANS

*[Describe all the components that must be presented and described as part of your municipal public engagement plans].*

Public Engagement Plans will, at minimum, include the following:

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### IX. [OPTIONAL] PUBLIC ENGAGEMENT REPORTING AND EVALUATION

*[Describe all the components that must be presented and described as part of your reports to Council on public engagement].*

- Information obtained in public engagement will be reviewed by *[insert CAO title]* and a report shall be provided to Council.
- The report shall include, at minimum, the following:

- i.

# 2.0 TEMPLATES

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c) Reports shall be provided to Council for review.

# 2.0 TEMPLATES

## 2.2 PUBLIC ENGAGEMENT FRAMEWORK® TEMPLATE

[insert municipality name] PUBLIC ENGAGEMENT FRAMEWORK

### Table of Contents

- 1.0 Introduction
- 2.0 Public Engagement Policy
- 3.0 Administrative Procedure
- 4.0 Public Engagement Approaches
- 5.0 Public Engagement Planning Process
- 6.0 Public Engagement Reporting
- 7.0 Public Engagement Evaluation

### 1.0 Introduction

[Consider and edit the following:

Our municipality's **Public Engagement Framework** describes how we approach and carry out public engagement. It includes reference to our:

**Public Engagement Policy**, (insert policy number), directs the purpose and value of having a policy, the principles that guide public engagement, key definitions, the responsibilities of Council and administration, the circumstances when public engagement will be used, the different approaches to public engagement, and the expectations associated with the policy.

**Administrative Procedure** directs administration to initiate and implement the Public Engagement Policy making use of the components of our Public Engagement Framework.

**Public Engagement Approaches** (replace with "Public Engagement Spectrum" if you are referring to a set spectrum of approaches) are the different ways that members of the public can participate in our decision-making processes.

**Public Engagement Planning Process** is the steps we take to ensure that our public engagement activities align with our policy and effectively support our decision-making.

**Public Engagement Reporting** is the way we inform the public what we heard (insert "and decided" if you offer What We Decided reports in addition to What We Heard report) through our public engagement activities.

**Public Engagement Evaluation** is the way we support continuous improvement and learn from our public engagement planning, activities, and reporting].

### 2.0 Public Engagement Policy

[Insert policy name, number, date adopted, and policy statement].

Enter description here...

### 3.0 Administrative Procedure

[Insert procedure name, number, date adopted, and policy statement].

Enter description here...

# 2.0 TEMPLATES

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## 4.0 Public Engagement Approaches

*[Insert the municipality's public engagement approaches – i.e., the public engagement spectrum; See [Public Engagement Guide Section 3.1](#) for Sample Approaches].*

Enter description here...

## 5.0 Public Engagement Planning Process

*[Describe the process the municipality uses to plan for public engagement; reference any plan templates or guidelines that exist].*

Enter description here...

## 6.0 Public Engagement Reporting

*[Describe the process the municipality uses to report on public engagement activities; reference any templates or guidelines that exist].*

Enter description here...

## 7.0 Public Engagement Evaluation

*[Describe the municipality's process for evaluating public engagement activities and its overall approach to public engagement or insert the municipality's public engagement evaluation framework].*

Enter description here...

# 2.0 TEMPLATES

## 2.3 ADMINISTRATIVE PROCEDURE TEMPLATE

*[insert municipality name]* **PUBLIC ENGAGEMENT ADMINISTRATIVE PROCEDURE**

**Legislative and Administrative Authorities** *[List relevant legislation, for example: Municipal Government Act (MGA), Alberta Freedom of Information and Privacy Protection Act (FOIP), Alberta Personal Information Protection Act and/or implications for existing municipal policies (i.e., employee conduct, security, safe workplace, technology use, communication protocols, etc.).]*

Enter description here...

- I. **Definition of Public Engagement** *[Insert your municipality's definition of public engagement; align with your Public Engagement Policy].*
  
- II. **Purpose** *[Identify the purpose of the administrative procedure (e.g., ensure consistent approach to public engagement across the municipality)].*
  
- III. **Procedure Statement** *[Identify what your municipality wants to achieve through public engagement; align with your Public Engagement Policy].*
  
- IV. **Application** *[Identify whom the procedure applies to (e.g., all municipal employees, municipal-hired consultants)].*
  
- V. **Roles and Responsibilities** *[Identify the roles and responsibilities of administration in general, specific departments, or positions and consultants, if applicable].*

## 2.0 TEMPLATES

### 2.4 PUBLIC ENGAGEMENT PLAN TEMPLATE

[insert municipality name] **PUBLIC ENGAGEMENT PLAN**

#### SECTION ONE: PROJECT BACKGROUND, DECISION(S), TEAM, AND STAKEHOLDERS

PROJECT NAME	WHAT IS THE PROJECT NAME?	
Project background	<ul style="list-style-type: none"> <li>What is the purpose of the project?</li> <li>What are the project goals?</li> <li>Why is this project important to your municipality?</li> <li>What input will you consider as part of your decision-making process(es)?</li> </ul>	
Project timeline	What is the timeframe for the project?	
PROJECT DECISION	DECISION-MAKER	TIMELINE
What are the key decisions related to the project?	Who will make the project decision?	When does the decision need to be made?
Project team	Who will be part of the team that will plan, implement, and use the input from your public engagement?	
Stakeholder List	Who do you want and need to engage to help achieve a well-informed and well-supported decision?	

#### SECTION TWO: PUBLIC ENGAGEMENT PURPOSE, GOALS, INPUT, AND LEVEL OF ENGAGEMENT

Purpose of public engagement	Why will public engagement be used for this project and how will it add value to your decision-making process?			
Public engagement goals	What will successful public engagement look like?			
Decisions to be made, level of engagement, and timeline	DECISION TO BE MADE	REQUIRED INPUT	LEVEL OF ENGAGEMENT	TIMELINE
	What decisions will we make?	What information is being sought to support decision-making?	What level of engagement is appropriate for the decision and information being sought?	When do you need to receive the public engagement input to support your decision-making?

# 2.0 TEMPLATES

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### SECTION THREE: PUBLIC ENGAGEMENT ACTIVITIES AND SCHEDULE

PUBLIC ENGAGEMENT PHASE	LEVEL OF ENGAGEMENT	PUBLIC ENGAGEMENT ACTIVITIES	TIMELINE
<i>Align with the project decision and information being sought from the public.</i>	<i>Insert level of engagement.</i>	<ul style="list-style-type: none"> <li>• Which activities best align with your preferred level of public engagement?</li> <li>• Will your stakeholders respond better to in-person or digital opportunities?</li> <li>• How much time do you need to plan logistics, communication, and any learning and development or community and stakeholder relations work?</li> </ul>	<i>When will you plan, implement, report on, and evaluate your public engagement activities?</i>

### SECTION FOUR: REQUIRED RESOURCES

RESOURCES	RESOURCE COORDINATOR	BUDGET
<i>Insert required resources (e.g., venue rental, consultant, print materials.)</i>	<i>Insert who will oversee coordination of the required resource (e.g., consultant).</i>	<i>Insert required budget allocation for each resource.</i>

### SECTION FIVE: INPUT MANAGEMENT

INPUT TO BE GATHERED	INPUT MANAGEMENT
<i>Identify what information will be gathered at each phase of your public engagement schedule.</i>	<i>How will the information be recorded, managed, and integrated into decision-making?</i>

### SECTION SIX: EVALUATION

<i>What are the indicators of success for the public engagement activities?</i>	
<i>What will you measure or evaluate?</i>	



# 2.0 TEMPLATES

<i>When and how will evaluation take place?</i>	
<i>How will you use our results to enhance our engagement?</i>	

## 2.0 TEMPLATES

### 2.5 PUBLIC ENGAGEMENT *WHAT WE HEARD* TEMPLATE

#### SECTION ONE: Summary (1-2 pages maximum)

High-level overview of the project, what has been done to date, what was heard through the public engagement activity, and next steps for the project.

#### SECTION TWO: Purpose of Report

Describe what the report will provide to the reader.

#### SECTION THREE: Project Overview

Describe the project, what it entails, who is involved, and how decisions will be made.

#### SECTION FOUR: Public Engagement Approach

What did you do and how?

*[A high-level description of the engagement approach and activities, when they occurred, how people were notified of the opportunity to participate (e.g., communications activities)].*

#### SECTION FIVE: Summary of Public Engagement Input

What was said?

*[A concise summary of the public engagement results for the activity].*

What we heard?

*[Outline the key themes that came out of the engagement and offer an analysis of how you reached those themes].*

#### SECTION SIX: What's Next

Describe anything that has changed with the project as a result of the public engagement activity.

Describe anything that has not changed despite public engagement input.

Identify how the public can continue to be involved in the project (e.g., attend next workshop, complete the survey, attend a Council meeting where a decision will be made).

#### Contact Information

Provide information on who the public can contact regarding the project.

# 2.0 TEMPLATES

## 2.6 PUBLIC ENGAGEMENT *WHAT WE DECIDED* TEMPLATE

### SECTION ONE: Summary (1-2 pages maximum)

High-level overview of the project, what has been done to date, what was heard through the public engagement activity, and next steps for the project.

### SECTION TWO: Purpose of Report

Describe what the report will provide to the reader.

### SECTION THREE: Project Overview

Describe the project, what it entails, who is involved, and how decisions will be made.

### SECTION FOUR: Public Engagement Approach

What did you do and how?

*[A high-level description of the engagement approach and activities, when they occurred, how people were notified of the opportunity to participate (e.g., communications activities)].*

### SECTION FIVE: What was Decided

What we heard	What we decided	Rationale for decision
Outline the key themes that came out of the public engagement activities.	Identify the decision made.	Describe why the decision was made.

### SECTION SIX: Conclusion

Describe when the project will officially conclude and identify how the public can continue to find out information about the project.

### Contact Information

Provide information on who the public can contact regarding the project.

## 2.0 TEMPLATES

### 2.7 COMMUNICATIONS PLAN TEMPLATE

PUBLIC ENGAGEMENT COMMUNICATIONS PLAN				
SECTION	KEY QUESTIONS		RESPONSES	
1. Desired engagement outcomes	<i>Why are you engaging with the public? What will your public engagement achieve?</i>			
2. Desired communications outcomes	<i>What do you want the public to feel or do to help achieve your engagement outcomes?</i>			
3. Barriers	<i>What is currently standing in the way of realizing your public engagement goals and communication outcomes?</i>			
4. Target audience	<i>Who will benefit the most from communication? Who can help you achieve your desired outcomes?</i>			
5. Key messages	<i>What do your target audiences need to know to help you achieve your desired outcomes?</i>			
6. Tactics	<i>What will have the biggest impact on your target audience? (i.e. stories, messages, visuals)</i>			
7. Tools	<i>What communication tools are the most efficient and effective to reaching out to your audience?</i>			
8. Resources and budget	<i>What resources and, if required, budget is necessary to implement your tactics and tools?</i>			
9. Evaluation	<i>How will you know that your communication efforts have contributed to your engagement and communication outcomes?</i>			
10. Supporting work plan	TACTIC	TOOL	LEAD PERSONNEL	DEADLINE