# Citizens and Local Government Engage! - A Pilot Project 

PROJECT DESCRIPTION AND LESSONS LEARNED

Project carried out for The Association of Kootenay and Boundary Local Governments funded by The Columbia Basin Trust

Prepared by:

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## 1. Introduction

In early 2014, the Association of Kootenay and Boundary Local Governments decided to carry out a collaborative project on community engagement. They wished to pilot this approach in three Kootenay and Boundary communities of different sizes, and the village of Fruitvale, the City of Grand Forks and the City of Cranbrook volunteered to be the pilot communities.

After a competitive RFP process, L.A. Taylor Consulting (LATC) was chosen to organize, promote, present and report on the three events. Working with the AKBLG project steering committee and representatives from the three communities, LATC established an approach and timeline for the events.

The committee determined that a municipal election year is a prime opportunity to have a meaningful and open discussion about the top issues and about how to get people engaged in the election, as candidates, as informed citizens, and, ultimately, as voters. The meetings were designed accordingly.

In Grand Forks and Cranbrook, the meetings were publicized via a Facebook event page, Facebook ads, an email fan-out, print ads and media release. In Fruitvale, the meeting was publicized via the Fruitvale News (a hard-copy mailout to every household), plus a Facebook event page, Facebook ads, email fan-out, posters, and e-bulletin boards. In order to make it easy for people to attend over the dinner hour, a buffet dinner was offered at all three events.

Meeting attendance was as follows:

- Fruitvale (Tuesday, March 11): 42
- Grand Forks (Wednesday, March 12): 63
- Cranbrook (Thursday, March 13): 52

All work at these events was done in table groups of $5-8$ people per table. Tables were shuffled twice during the event, so that participants got to share ideas with different groups of people.
L.A. Taylor Consulting thanks the AKBLG for the opportunity to carry out this interesting pilot project, The Columbia Basin Trust for funding the project, the mayors, councils and citizens of the three communities for volunteering to be the test locations, the members of the project steering committee for their guidance, the event participants for their energy, enthusiasm and willingness, and Jill Prince of Fruitvale, Diane Heinrich of Grand Forks and Kelly Thorsteinson of Cranbrook for acting as local experts and local point people in the organization of these events.

This report summarizes the planning, organization, promotion and delivery of the events, and describes what went well and the lessons learned, for the benefit of future similar events. Meeting content can be found in the companion report: Community Conversations - Meeting Records.

## 2. Planning and organization

### 2.1 The timeline

- January 22 - RFP distributed
- January 29 - my proposal submitted
- February 11 - organizational meeting held with steering committee
- February 17 - contract signed
- February 17 - dates and locations finalized
- February 18 - workplan/checklist emailed to local experts
- February 19 - initial phone meetings with local experts
- March 11, 12, 13 - events presented
- April 1 - draft report provided
- April 11 - presentation of project results at AKBLG AGM

As you will see from the above timeline, there was a period of only four weeks between the first organizational meeting and the first event. This was driven by three factors: the date of issuance of the RFP, the wish to have at least some project results presented at the AKBLG AGM in early April, and the timing of school spring break in southern $B C$, which eliminated the last two weeks of March as potential meeting dates.

Lessons learned:

- Ideally, I would recommend at least a six-week window between the initial organizing meeting and the first event. This would allow more lead time for venue booking and choices and put less pressure on the local experts and the facilitator. It would also allow print ads to come out before electronic promotion, as described in section 3.1 below.


### 2.2 Initial organizing meeting

At the initial organizing meeting (via videoconference), the steering committee and the facilitator discussed:

- The objectives of the project
- The timing of the work and the events
- The design of the events
- The appointment of local experts
- Contract provisions

Full minutes of the meeting can be seen in Appendix A.

Lessons learned:

- Ideally, the steering committee would meet in advance of the first meeting with the contractor, to pin down an agreed-upon common view of the objectives and nature of the project.
- It would also have been useful to have a budget for the project overall, and for local logistics specifically, so that the contractor could give local experts a clear sense of the cap on venue and food expenses.
- The meeting was held by videoconference, requiring participants to travel to videoconference locations. In retrospect, I think that we could have accomplished the same results via conference call, and saved everyone some time. However, I do recognize the importance of building an initial relationship between the steering committee and the contractor, and I know that face-to-face contact is an important contributor to that relationship-building.


### 2.3 Local experts

As part of my proposal, I specified the need for "one point of contact with each of the chosen local communities, and that point of contact would need to engage in on-the-ground arrangements." I called these people my "local experts".

Local experts were responsible for booking the local venue and food, for providing their insight on my questions about their communities, for encouraging local elected officials and staff to participate in the email fan-out and Facebook invitations, for handling the RSVP system, and for helping set up and greet participants on the night of the event.

The three people chosen by the communities were perfect for their roles. The qualities needed are: good connections with the whole range of elected officials and staff, a history in the community that allows them to predict what promotions, etc. people will best respond to, attention to detail, rapid response time on email.

The workplan/checklist that I provided to the local experts can be seen in Appendix B. We reviewed this in the initial phone meeting, and I found that the combination of meeting aand written checklist meant that they were very clear on what needed to be done and could work independently with occasional check-ins.

Lessons learned:

- As expected, the local expert is key to making the event happen.
- The qualities needed in a local expert are: good connections with the whole range of elected officials and staff, a history in the community that allows them to predict what promotions, etc. people will best respond to, attention to detail, rapid response time on email, a tactful and pleasant phone manner for dealing with the public.
- Before these people are asked to take on this work, the whole elected body (mayor and councillors) needs to be aware of what project they are working on, and why.
- With short timelines, a lot of pressure was put on the local experts. Longer timelines would make it more reasonable for these people to combine this work with their normal duties.


### 2.4 Weekly updates

Each Monday, I provided weekly updates on what had been done and what the focus would be for the coming week. These were sent to the steering committee and the local experts. They provided an opportunity for people to ask questions about anything that seemed unclear.

The full text of the weekly updates is included as Appendix C.

Lessons learned:

- Weekly updates are essential to keep everyone in the loop and comfortable.


### 2.5 Time of meeting

The meetings were held from 6:30 pm to 9 pm . I recommended this timing for a few reasons:

- 2.5 hours is about the maximum that one can expect a group to be productive in the evening.
- I wanted to ensure that people had time to get organized and to the meeting after finishing work for the day.
- I felt that 9 pm would allow people to be home in time to supervise children's bedtime.

Lessons learned:

- I received feedback from several people suggesting that the time should have been earlier. 5:30 to 8 pm and 6:00 to 8:30 pm were two suggestions. This choice should be dependent on the normal patterns of the community where the event is being held - I was making assumptions based on the patterns of my own community, and I should have explored those assumptions with the local experts before finalizing times.
- I received feedback that the meeting should have been longer. There is no doubt that we packed a lot into a short time. However, if clients want to go deeper into the topics, my recommendation is that fewer topics be assigned to the meeting design. I remain of the opinion that participants start to flag after about 2.5 hours of hard work in the evening.


### 2.6 RSVPs

In order to predict the amount of food needed, and keep numbers to a level that one facilitator could manage, Cranbrook and Grand Forks used RSVPs. Fruitvale decided not to, based on a perception that RSVPs do not work well in their community.

Grand Forks had 75 RSVPs (a combination of phone and email RSVPs, plus "Going" numbers on Facebook). Final attendance was 63, 11 of whom had not RSVP'd.
Cranbrook had 98 RSVPs (a combination of phone and email RSVPs, plus "Going" numbers on Facebook). Final attendance was 52

Lessons learned:

- In Cranbrook in particular, some members of the community expressed concern that there was any number cap on this event. They felt that "anyone who wants to go should be able to go". If this approach is tried in future, it will mean that food cannot be offered. I should note that - in the end - everyone from the small waiting list in Cranbrook was accommodated.
- Unfortunately, with these events, we have found that RSVPs were not very reliable predictors of attendance.
- It should be possible to suggest a "discount rate" for Facebook "Goings" (see section 3.4 below) and other RSVPs, in order to cut back on waste and expense. Looking at the overall numbers above, it should be reasonable to plan for an attendance that equals $80 \%$ of the overall RSVP numbers, without taking too much of a risk.
- A participant in Cranbrook suggested that people should pay a nominal deposit (\$5) when they RSVP, and lose it if they do not attend. However, unless the community has a website set up for online payments, the logistics of doing this could be daunting.
- In retrospect, Fruitvale felt that they should have tried an RSVP system.


### 2.7 Venues

In Fruitvale, we used the village hall, in Grand Forks, the banquet room of a local restaurant, and in Cranbrook, the ballroom of a local hotel/convention centre.

The Fruitvale venue worked well, but was the most work to set up as it did not come with staff. There was feedback that I should have placed the tables farther apart to make it easier for people to hear the conversation at their own table.

In Grand Forks, the venue we had available (given the short time frame) was definitely too small for the numbers, with eleven participants commenting on crowding and acoustics. Set-up and clean-up were handled by the restaurant staff, making it easy for meeting organizers. However, rather than being 8 people at each table, the table sizes were varied ( 9 to 12 people), meaning that I had to re-pack the activity envelopes in the hour before the event started, and that table changes required careful management.

In Cranbrook, we had lots of room and set-up and clean-up were well handled by hotel staff.

Lessons learned:

- Community-owned venues send a good message about the nature of the meeting, but may require more work for set-up and clean-up.
- A room template might be a good idea. Spacing the tables is important for the table conversations to work well. And I need to be very clear about the necessity for table sizes to be consistent and with 8 participants or fewer at each table.
- Round tables work much better than rectangular tables.


### 2.8 Food

All locations had a buffet. Fruitvale offered a range of salads and chicken pieces, with cookies for dessert. Grand Forks offered pizza and salads, with squares and cupcakes. Cranbrook offered pizza and salads.

Comments on the food were varied. Many people appreciated having dinner taken care of -it made it easier for them to come out to an evening meeting. A few people felt that money should not be spent on food, or that having to deal with the buffet first delayed the meeting.

## Lessons learned:

- If offering food, be sure to offer a vegetarian option and a gluten-free option. We did the former in all locations, but the latter was an issue in Cranbrook.
- Having cookies or something similar available around 8 pm seemed to give people added energy.


### 2.9 Child care

I suggested considering child care in my proposal, but all three communities felt - quite rightly -- that it would be complicated to organize. We have no hard data on what impact this had on the attendance of parents with young children at home, but it does seem likely that having child care would make it easier for those members of the public to participate.

In one community, three young children were brought to the event. On the evaluation form, under the question "What is one thing you would change about tonight's event?", three participants stated "no children under 12" as their top requested change.

### 2.10 Three meetings in three days

Because of the tight timeline noted in Section 2.1 above, and to save money for the organizers, I chose to do three meetings on three successive nights. This worked, but just barely. In the mornings, I unpacked and organized the envelope contents from the night before, read the evaluations in case I needed to make immediate changes, then packed the envelopes for the coming evening. Then I drove to the next location. If there had been a lengthy avalanche control closure on the Salmo-Creston on day three, I would not have made it from Grand Forks back to Cranbrook in time to return my rental car and get set up for the meeting.

Lessons learned:

- If there is a drive of more than two hours between locations, and/or any likelihood of road closures, then allowing an extra day would be wise.
- An alternative would be to have a second person on the road with me, or to have locals assigned to help with the envelope unpacking/packing.


## 3. Promotion

### 3.1 Timelines

Because of the tight timelines and the long lead times for print ads, I chose to start the Facebook and email campaigns before the print ads appeared. In Cranbrook, this led to a perception among some members of the public that the event was being preferentially promoted to particular groups. Ideally, if enough time is available, print ads should appear first, so that everyone is clear that the events are general public events, and no one can claim to have been ignored in the promotional process. However, in this particular case, if we had waited for the print ads to appear before running with other promos, our participants would have found out about the events less than a week before they occurred.

Lessons learned:

- If possible, run print ads before starting social media and email campaigns.

The timeline below shows the sequence of promotional activities for this project.

February 21:

- Facebook event pages posted and links provided to communities
- "Hold the date" email texts supplied to all three communities for distribution to email lists
- Short-form and long-form promos provided to all communities
- Text for Fruitvale News provided to village to meet February 21 deadline


## February 24:

- Facebook ad campaign began running in Cranbrook and Fruitvale
- Fruitvale put up posters for the event and added it to e-bulletin boards
- Ad space booked in Cranbrook Daily Townsman and Grand Forks Gazette
- First click-through responses appear on Fruitvale's and Cranbrook's Facebook event pages

February 25:

- Event response rate peaks on Cranbrook Facebook event page

February 26:

- Facebook ad campaign began running in Grand Forks
- First click-through responses appear on Grand Forks' Facebook event page
- Grand Forks posted event on their city website

February 27:

- Display ad copy provided to Cranbrook Daily Townsman and Grand Forks Gazette
- Talking points in case of media follow-up provided to mayors of Cranbrook and Grand Forks
- "Hope to see you" email texts supplied to all three communities for distribution to email lists
- Event response rate peaks on Grand Forks Facebook event page

February 28:

- Media release provided to Cranbrook Daily Townsman and Grand Forks Gazette

March 5:

- Print ads appear in Grand Forks Gazette


## March 6/7:

- Print ads appear in Cranbrook Daily Townsman and Kootenay Advertizer
- Event response rate peaks on Fruitvale Facebook event page


### 3.2 Geographic differences in chosen promotions

In Cranbrook and Grand Forks, the local experts identified a clear "newspaper of record" that we could use for print ads. In Fruitvale, most locals rely on the Fruitvale News (a villagepublished hard copy that goes out by mail to all households) for local event information, so we chose not to print in a commercial newspaper.

### 3.3 Relative effectiveness of different promotions

According to the evaluation surveys, people who attended the events found out about them in the following ways:

| Promo means | Fruitvale | Grand Forks | Cranbrook |
| :--- | ---: | ---: | ---: |
| Facebook | $9(24.3 \%)$ | $12(20.7 \%)$ | $13(27.1 \%)$ |
| Email | $9(24.3 \%)$ | $20(34.4 \%)$ | $8(16.7 \%)$ |
| Fruitvale News | $8(21.6 \%)$ |  |  |
| Poster | 0 |  |  |
| e-bulletin board | 0 |  | $14(29.2 \%)$ |
| Word of mouth | $11(29.7 \%)$ | $17(29.3 \%)$ | $5(10.4 \%)$ |
| Other | $3(8.1 \%)$ |  | $7(14.6 \%)$ |
| Newspaper ad |  | $11(19 \%)$ | $5(10.4 \%)$ |
| Newspaper story |  | $2(3.4 \%)$ |  |
| City website |  | $4(6.9 \%)$ |  |

### 3.4 Facebook event pages and ad campaigns



After posting the Facebook event pages, I created the Facebook ad campaigns to go with them, targeting people 18 and over in the three communities. The performance of the Facebook ads and their costs can be seen in the screen captures shown in Appendix D. Besides monitoring
the campaign performance, I checked the pages regularly to respond to any comments. As we approached capacity in Cranbrook and Grand Forks, I changed the event page names to "Sorry - This event is now full", posted explanations, and personally messaged everyone on the "Maybe" lists to let them know that we were full and they could add their names to a waiting list.

Lessons learned:

- Facebook event pages are free. Facebook ads are inexpensive, targeted, and if they don't work, you don't pay.
- Some Facebook users do not understand how to find event pages or how they work, once found. It is very important for the community to send out the Facebook link to their contacts, and also for staff and elected officials who are Facebook users to sign up for the event and to then "invite" their Facebook friends. I should have included some wording on the event page to explain how event pages work, and to encourage members of the public to "invite" their Facebook friends, once they had signed up for the event.
- The tightest focus possible for targeting Facebook ads is a radius of 25 miles. In Grand Forks, this would not be a problem, but in Fruitvale, it would have resulted in the ad being shown to residents of (for example) Trail and Rossland. It's important to look at the geographic surroundings of the target community and take that into account in choosing whether to run an ad and in wording the ad.
- A public event page like this is subject to being posted upon by users with other agendas, and these were no exception. Wishing to avoid any appearance of censorship, we left the unrelated posts up on the page. However, monitoring is necessary, because the possibility of an unacceptably offensive post exists.
- Some responses on the event page will be negatively targeted at the event or at local elected officials. As an out-of-towner with no local axe to grind, it was perhaps easier for me to respond to such comments than it would be for a local person to do so.
- I made the local elected officials co-hosts on the event pages, as I felt that the buy-in of the local community would be best illustrated in this way. Unfortunately, this did muddy the waters regarding who (AKBLG) was actually presenting the event. It also led to a couple of accusations that the event was a showpiece for incumbents.
- The flexibility of Facebook ads is a wonderful asset. When we were apparently filling up in Cranbrook, it was easy to stop the ads immediately.
- The ratio of people who said they were "Going" on Facebook to people who actually showed up at the events was a problem. In Grand Forks, of the 32 "Goings", 15 actually attended. In Fruitvale, of the 31 "Goings", 16 actually attended. For future events, this leads to two suggestions: message all the "Goings" a few days before the event to
remind them, and/or discount Facebook "Goings" numbers to $60 \%$ when calculating RSVP numbers.


### 3.5 Email blasts

I had originally planned three email blasts:

- Save the date
- Hope to see you (why it's important to come
- Reminder to come

We used an email fan-out approach: I prepared the text for each email, and provided it to the local expert, who then distributed it to council members and staff to send to their lists.

Because the events appeared full, I decided not to send the third email to all potential participants.

The texts of the two email blasts can be seen in Appendix E.

Lessons learned:

- Email blasts are free and they work.
- The email blasts were important in getting people out, as seen in section 3.3. However, this approach depends entirely on the assumption that communities, their elected officials, and their staff will have substantial lists of people to whom they would normally send event notices.
- A downside of using the email blast was that a few people felt that this was evidence that the events were being promoted only to "friends of city hall". In future events, all such emails should include the words "Please forward this email to everyone you know, so that we can inform the whole community of this event".
- I should have suggested to the local experts that they collect the email addresses of everyone who RSVPd, so that we could have sent a reminder email just before the event.


### 3.6 Print ads and media releases

The print ads were by far the most expensive means of promotion, had the longest lead time, the least flexibility and they were not the most effective. However, they are essential, because print is still perceived as the most universal method of reaching the public. Without print ads,
you are open to the perception that you have not made the event generally known. Placing a print ad also makes it much more likely that your media release will be picked up by the editor.

## Join the conversation!

## March 12, 2014 <br> 6:30-9:00 p.m. Omega banquet room

## A chance for Grand Forks citizens <br> to talk about:

- what "top five" municipal issues you want to explore this year
- What information you need to do that, and
- How to get everyone engaged in the municipal election this fall


## Light buffet provided

Seating is limited, so reserve your place at the round table - RSVP by March 7
to info@grandforks.ca
This event is organized by The Association of Kootenay \& Boundary Local Governments, working in partnership with the City of Grand Forks.

Media releases may prompt a story, and someone should be available in case a reporter chooses to ask a few follow-up questions. In the case of this project, the three mayors agreed to be the follow-up contact, and I supplied talking points for their convenience in doing interviews. Examples of the media release and talking points can be seen in Appendix F.

Lessons learned:

- Try to minimize spending on print ads.
- The smaller the community, the longer the advance notice needed for print placement.
- If possible, run print ads before starting social media and email campaigns.
- Be sure to let the editor know that you've run a print ad when you submit your media release.


## 4. Delivery

The events were designed to deliver on three main objectives:

- Provide a minor educational component about what municipal government does and how it is funded
- Gather responses about the key issues and opportunities that are top of mind for community residents and the information needed to have informed conversations about those issues
- Gather ideas on how to engage people in the coming election, as candidates, as informed citizens and/or as voters.

On their arrival, we welcomed participants and gave them name tags. They then chose their own seats at tables with (usually) eight chairs. Each table had ground rules and activity envelopes already in place:


Activities were as follows:

- Roles of government: Each table was given an envelope with several slips of paper - every table's envelope was different. Each paper had on it one service that Canadians receive from government. The table task was to separate these services into federal, provincial and local government, and post them in the appropriate locations on the wall.
- Tax distribution: Each table was given a large loonie cut into tenths, and told that this loonie represented their total tax dollar for all types of taxes. They were asked to decide how much of this dollar goes to each level of government, and to post the wedges of the loonie in the appropriate locations on the wall.
- Issues and opportunities: Meeting participants were given a flipchart sheet with twenty boxes marked off, and were challenged to come up with twenty key issues or opportunities that their community should be talking about in this. They then used a prioritizing method to determine which five issues their table could agree on as being the top priority for exploration and discussion.
- Information needed: Once the tables had established their top five issues/opportunities, they were asked to come up with "questions of fact" for each item. In introducing this section, I pointed out that, in order to have an informed discussion on a municipal issue, it would be important to know some background, objective facts.
- Election engagement: Table groups were asked to fill out a workbook, providing their ideas for encouraging people to offer themselves as candidates, for encouraging people to become informed about the issues and the candidates, and for getting people out to vote.

Lively discussions:


Resulted in some challenges for me as I transcribed the results:


Each table appointed a note-taker. I shuffled the tables twice during the evening, with the note-takers remaining in place.

Lessons learned:

- Quality of note-taking varied. It was suggested in one feedback session that perhaps we should have assigned note-takers to each table (council or staff members) in order to even out the quality. I think that leaving the pen in the hand of a non-municipal person sends a strong message that this is a meeting at which citizen voices are paramount. But certainly, I could do more coaching of note-takers throughout the evening. I found that visiting the tables and posing such questions as "Did you capture that idea fully?" and "Will I understand this point when I try to read it three weeks from now?" seemed to help.
- We could consider appointing table facilitators as well as table note-takers. The facilitators would have the job or reminding people about the rules, about the current
question (staying on topic) and about the time remaining. We could give them sheriff's badges!
- Moving tables worked well. However, I need to ensure that I have sequential table numbers before starting this - in other words, if some tables have been left empty, eliminate their numbers and renumber remaining tables before the first move. And I need to group people into full tables before we start.
- The warm-ups worked well. In future, I should count the dollar wedges before they come off the wall, as photos alone do not capture stacked wedges well.
- The issues and opportunities sections worked well. The part where I asked them to eliminate duplicates was surprisingly key to successful prioritization.
- The "question of fact" section needed more coaching for some groups. Some groups would take the issue/opportunity and just turn it into a question, for example "Economic development" became "How can we attract more business?", which is more a question of opinion, to be answered AFTER one has lots of facts. I needed to provide more examples and more at the table coaching to get better responses, or perhaps I should have worked through one or two examples with the entire room before turning them loose.
- As part of coaching for the "election engagement" section, I encouraged the table groups to start out by asking themselves "What are the obstacles?" In other words, what are the obstacles that keep people from being candidates, from being informed, from showing up to vote. In retrospect, I wish I had asked them to record these obstacles, because they were an interesting and informative part of the discussion.
- We didn't do any full-room "de-briefs". Everything happened at the tables. There was some feedback from people who would like to have had full-room discussion so that they knew what other tables had come up with. I agree that this would have been a good thing. However, it takes time, so to do it, we would need to lower the number of subjects covered.


## 5. Evaluation

### 5.1 Participant feedback

At the end of the evening, participants were asked to complete an evaluation form. This form, and complete evaluation results, can be seen in Appendix $D$ of the meeting results report that is a companion to this document.

## Lessons learned:

- Some people had difficulty with the agree/disagree range on the evaluation form. It might be a good idea to go through this in detail with the group before asking them to fill it out.


### 5.2 Elected official and staff feedback

Mayors, councillors and staff members present at each event were asked to stay after the event to provide their feedback while the event was fresh in their minds. I very much appreciate their willingness to do this at the end of a long day. Highlights of these discussions follow:

What Fruitvale liked:

- Diversity of attendees - a more diverse group than would normally come to a municipal event
- The format of the evening
- The envelopes with the individual tasks - the groups enjoyed this approach
- The warm-up activities, fun and informative

What Fruitvale would do differently next time:

- An earlier time slot: 5:30 to 8 pm . Some people had to leave at the end for children's bedtimes or to let their babysitters go home.
- Move the tables farther apart - it was sometimes difficult to hear because of noise from next table.
- Do RSVPs.
- Use a working sound system

What Grand Forks liked:

- Good diversity of attendees
- Good number of attendees, interest in the community
- Positive tone of interaction
- Changing the tables - mixing up the groups
- Sequence of events - the steps were clear, the flow made sense
- Good ideas - mayor and councillors loved the "speed dating" idea to replace the more traditional all-candidates' forum.

Grand Forks would like to do more like this.

What Grand Forks would do differently next time:

- The quality of note-takers at the tables has an impact on effectiveness. Consider finding a way to ensure equal quality.
- Consider some advance work for people on the topics - "Think about this before you come" or "Note down some ideas about this topic before you come".
- Add a regional district component.
- More sharing with the whole room, possibly whole-room de-briefs after each component.
- Facilitator should say "Association of Kootenay and Boundary Local Governments" each time, as "AKBLG" is not a familiar expression here.

What Cranbrook liked:

- The warm-up activities (\$s, levels of government) worked well.
- Moving tables worked well.
- Participants felt comfortable, format reduced wariness.
- Time of day - could not go earlier than 6 pm .

What Cranbrook would do differently next time:

- Print ads need to come out first, or at least simultaneously with electronic media, to ensure that the "general public" is reached right away.
- Consider charging $\$ 5$ to RSVP. Even if this is refunded in the end, it might increase compliance with what people said they would do.
- Consider assigning tables for the start.
- The meeting could have been longer, gone deeper.


# Appendix A - Organizational meeting 

Meeting, videoconference, CBT offices, Golden, Castlegar, Cranbrook<br>12:30 pm MT/11:30 am PT, February 11, 2014<br>Deb Kozak, Wes Graham, Wayne Stetski, Patricia Ceccini, Leslie Taylor

## Item for discussion: <br> Overall timeframe: <br> - April 9-11 AGM as driving force behind timeline - objective/nature of presentation <br> - Timing that falls out of that, for events and for reporting

| Agreed that ... | Next steps ... | Lead person |
| :---: | :---: | :---: |
| We want to be able to present a useful outcome of collaboration at the April AGM. This could take the form of comparing and contrasting what we learned about issues and election prep in the three communities, plus recommendations for doing this type of work going forward. |  |  |
| We like an approach that will include a warm-up activity focusing on the varying roles of different levels of government, followed by a facilitated conversation that centres around: <br> What issues are important to you - what would you like to see explored/discussed/engaged in during the local elections this fall? And ... <br> What can we do to ensure that the most people possible get involved in these elections and have input to the outcome? <br> The idea is to end up educating the groups a bit about levels of government, and also coming out with top ten issues and top ten ways to improve election engagement and possibly top ten things people would like more information on. | Keep in mind during session design | LT |
| We recognize that some of the sub-questions or background will be different in each of the three communities | Keep in mind during session design | LT |
| Important pieces of information for background: the 8/42/50 cent info, and how many dollars make a $1 \%$ tax increase in your community. | Keep in mind during session design | LT |
| Leslie prepares the PPT presentation and can present it jointly with a working group member or members. | Prepare the PPT from the results of the three sessions | LT |
|  | Choose who will be the | Working |


|  | presenter(s) | group |
| :---: | :---: | :---: |
|  | Let us know when we'll be in the AGM schedule | WG |
| The group agrees that the timeline in the proposal from $L T$ is the right one to get to where we want to be by April 9 |  |  |
| Item for discussion: <br> Timeframe for holding the individual events: <br> - Advantages/disadvantages of grouping them in one week <br> - Confirmation of school spring break dates <br> - Ideal and other potential dates for individual events |  |  |
| Agreed that ... | Next steps... | Lead person |
| Grouping the three events in one week is do-able and will save travel costs |  |  |
| School spring break is the last two weeks in March |  |  |
| Our best dates are March 11 in Fruitvale, March 12 in Grand Forks and March 13 in Cranbrook | Book venues and caterers ASAP | Local contacts in all three communities |
|  | Use these dates in all communications | LT, local contacts |
| Item for discussion: <br> Design of individual events: <br> - Length <br> - Conversation time vs. presentation time <br> - Dinner: part of the conversation time? Before? After? <br> - Note-taking |  |  |
| Agreed that ... | Next steps ... | Lead person |
| The length of 2.5 hours (as suggested in the proposal) is acceptable | Keep in mind during design | LT |
| Earlier timing seems to work - a 6 pm or $6: 30 \mathrm{pm}$ start. | Keep in mind during design | LT |
| For this round, we will emphasize conversation time and minimize presentation time | Keep in mind during design | LT |
| The first 30 minutes will be for eating, socializing and getting settled in. The last 2 hours will be for the real work. | Keep in mind during design | LT |
| We will attempt to design the sessions so that the tables take their own notes, and a dedicated notetaker is not needed. If it turns out that we need a dedicated note-taker, the working group would prefer LT to bring one (the same for all three sessions). | Keep in mind during design | LT |
| Item for discussion: <br> Location of individual events |  |  |


| Agreed that ... | Next steps ... | Lead person |
| :--- | :--- | :--- |
| The three locations in the RFP are confirmed: |  |  |
| Fruitvale, Grand Forks and Cranbrook |  |  |

## Item for discussion:

The local contacts:

- Practicality of having one local point of contact for each event
- Responsibility breakdown, consultant and local point of contact

| Agreed that ... | Next steps ... | Lead person |
| :---: | :---: | :---: |
| Having a local contact handle the logistics is a costeffective approach. |  |  |
| People will respond better to an RSVP request if it goes to an email or phone number that is recognizable/local |  |  |
| Local contacts will be responsible for: <br> - Booking the venue <br> - Arranging food for the event <br> - Arranging clean-up after the event <br> - Assisting LT in determining the catchment area for the meeting <br> - Distributing email text provided by LT to local politicians/administrators for emailing to their contacts <br> - Designating which local media should receive media releases about the events <br> - Arranging for a local to be the voice of the event in any followup interviews <br> - Providing an RSVP email and monitoring the RSVPs <br> - Possibly arranging child care for the event <br> - Participating in the meeting immediately after the event, to capture what went well/what could be improved. <br> - $\quad$ Sending all bills to Arlene Parkinson AKBLG | Fruitvale, Grand Forks and Cranbrook designate their local contact ASAP and provide contact info to LT | WS, CW, PC |
|  | Provide checklist of what needs to be done and by when | LT |
|  | Include this info in contract | LT |

Reviewing other key contract provisions:

- Key points for consultation with Working Group
- Communication format with Working Group, and for future meetings
- Payment schedule
- Inability to perform
- Termination
- Contact/signature for AKBLG?

| Agreed that ... | Next steps ... | Lead person |
| :--- | :--- | :--- |
| LT will provide a weekly update to all members of | Provide weekly email update | LT |


| the working group by email, providing information <br> on what has been done, what obstacles (if any) <br> have arisen, and next steps |  |  |
| :--- | :--- | :--- |
| Anyone who has questions or concerns about items <br> in the weekly update will use Reply to All and email <br> those questions/concerns | All |  |
| Anyone who feels that a meeting of the group is <br> called for will send out that request by email |  | All |
| Future meetings of the group will be by conference <br> call. |  | LT |
| The payment schedule will be monthly and will <br> incorporate work, travel and disbursements to date | Include in contract. Send bills at <br> month-end | LT |
| The group recognizes that LT is a sole operator, and <br> that she may be unable to perform the work if an <br> emergency arises | Include in contract | LT |
| A termination clause will cover termination by <br> either party, with or without cause. | Include in contract | LT |
| The contact/signator for AKBLG will be Arlene <br> Parkinson | Include in contract |  |

## Appendix B - Workplan/Checklist Shared with Local Experts

| NOTE: LE = Local Expert LT = Leslie Taylor |  |  |  |
| :---: | :---: | :---: | :---: |
| Item | By when | By whom | status |
| Facilitation design: |  |  |  |
| Set dates | Feb 14 | Wk grp | done |
| Set locations | Feb 14 | Wk grp | done |
| Choose topics | Feb 14 | Wk grp | done |
| Discuss questions and local sub-text with local experts | Feb 24 | LT |  |
| Design sessions | Mar 5 | LT |  |
| Purchase, prepare, deliver materials for sessions | sessions | LT |  |
|  |  |  |  |
| Event logistics: |  |  |  |
| Decide on target numbers of participants | Feb 19 | LE \& LT |  |
| Book venue, tell LT place name and address | Feb 21 | LE |  |
| Book food and clean-up | Feb 28? | LE |  |
| Decide whether to try child care | Feb 21 | LE |  |
| Book travel, accom, car | Feb 21 | LT |  |
| Bills for on-site to Arlene at AKBLG | Mar 15 | LE |  |
|  |  |  |  |
| Event promo: |  |  |  |
| Draft short-form and long-form event descriptions, provide to LEs | Feb 21 | LT |  |
| Draft email text 1 (hold the date), send to LEs | Feb 21 | LT |  |
| Get elected officials and administrators to send email 1 to their email lists | Feb 24 | LE |  |
| Draft email text 2 (why it's important to come), send to LEs | Feb 28 | LT |  |
| Get elected officials and administrators to send email 2 to their email lists | Mar 3 | LE |  |
| Draft email text 3 (don't forget), send to LEs | Mar 7 | LT |  |
| Get elected officials and administrators to send email 3 to their email lists | Mar 10 | LE |  |
| Send community logo jpegs for Facebook event pages to LT | Feb 21 | LE |  |
| Create Facebook page for each event | Feb 21 | LT |  |
| Create Facebook ads | Feb 21 | LT |  |
| Provide tweets | Feb 21 | LT |  |
| Provide local media list to LT | Feb 21 | LE |  |
| Find out editorial and advertizing deadlines | Feb 21 | LT |  |
| Write media releases | Feb 24 | LT |  |
| Distribute media releases | Dependent on deadlines | LT |  |


| Write ads | Feb 24 | LT |  |
| :--- | :--- | :--- | :--- |
| Send ads for layout, proof ads, place ads | Dependent <br> on <br> deadlines | LT |  |
| Provide RSVP email contact to LT | Feb 21 | LE |  |
| Provide name of local "voice" for followup media to LT | Feb 24 | LE |  |
| Provide talking points to local voice | At time of <br> media <br> release | LT |  |
| Event results: |  |  |  |
| Meet immediately after the event with local government <br> elected officials and admin to gather feedback | Night of <br> event | LT \& LE |  |
| Provide survey form at event | Night of <br> event | LT |  |
| Create online survey for post-event use | Mar 10 | LT |  |
| Collect and summarize notes from event | Mar 28 | LT |  |
| Draft report to communities and working group | Mar 28 | LT |  |
| Incorporate response into final report | Apr 5 | LT |  |
| Prepare presentation re events for AKBLG AGM | Apr 8 | LT |  |
| Present at AGM | Apr 10? | LT |  |
|  |  |  |  |
|  |  |  |  |

## Appendix C -- Weekly updates to steering committee and communities

## Monday, February 17, 2014:

Good morning, everyone:
Here is your first weekly email update, as agreed upon at the February 11 meeting.
Here's what happened this past week:

- LT met by videoconference with Deb Kozak, Wayne Stetski, Wes Graham and Patricia Cecchini. LT prepared minutes and provided to all attendees. Key decisions were around the questions to be addressed, the dates for the events, and contract matters.
- Grand Forks and Cranbrook designated local admin reps to work on this project. LT answered various questions raised by the local admin reps.
- A question arose about budget for the local event arrangements (venue rental, food, etc.). The answer from CBT seems to indicate that as long as we are reasonable and reflect typical average costs for the region, there is not a set budget ceiling for the logistics of this project.
- A problem arose regarding the dates that were agreed on for the events. Options for solution were provided by LT to the working group, with copies to everyone involved. A suggestion arose that the local governments may need more time to be on board with the project, so that a delay may be beneficial. However, the point was also made that a delay negatively affects the presentation at the AGM.

Here's what needs to happen this coming week:

- The date issue is the top priority. The admin reps and LT cannot move forward until this question is decided by the working group and the three involved communities. Delaying this decision may make the decision for us, as the March dates will rapidly become unachievable.
- LT needs to find out who the local admin rep will be for Fruitvale.
- Assuming dates can be set, LT and the local admin reps will need to do the following tasks this week:

LT : get the contract signed, discuss the overall arrangements checklist with the local admin reps, consult with local admin reps about numbers to expect/venue sizes, find out the RSVP email address and the chosen venue from the local admin reps, create Facebook pages for each event, set up Facebook ads for each event, write long-form and short-form promos and media releases, get the community logos and the local media contacts from the local admin reps, find out advertizing and editorial deadlines for each of the local media contacts.

Local admin reps: choose and book venues, provide the community logos and the local media contacts to LT.

As we agreed at the February 11 meeting, please use Reply to All to raise questions, concerns or suggestions about any of these items.

## Monday, February 24, 2014

Good morning, everyone:
Here is your second weekly update (and what a week it was!)
This past week, I worked in partnership with Local Experts Kelly Thorsteinson (Cranbrook), Diane Heinrich (Grand Forks), and Jill Prince (Fruitvale), and together we got the following items done:

- Contract signed
- Flight and rental car booked
- Initial kick-off phone meeting with each Local Expert
- Venues are booked
- Target participation numbers have been set: 50 for Fruitvale, 60 for Grand Forks, 80 for Cranbrook.
- RSVP email addresses have been decided, except for Fruitvale - they find RSVPs do not work well in their community
- Short-form and long-form promos have been written and provided to all three communities
- Child care: Cranbrook and Grand Forks decided not to provide, Fruitvale is looking at a possible combination of an already-planned youth art event with an opportunity for smaller children to engage
- Facebook: event pages are up, ad campaigns start running on Facebook today except for Grand Forks, which starts on Wednesday. Facebook info has been provided to all three communities, and local council and admin are starting to reach out to their Facebook friends.
- Email: the initial "hold the date" email has been written and distributed to the communities, and local council and admin are starting to send to their email lists.
- Twitter: the general message from everyone was that Twitter is not big in their communities, so we are holding off on Twitter.
- Local media: all three communities have given me their logos and their local media info. We have already submitted info to the Fruitvale News, as it is a monthly and had its deadline on Friday. Cranbrook has provided an approved "mayor's quote" and Grand Forks has theirs for approval. All communities have agreed that their mayor will be the local "voice" for follow-up interviews.

Here's what needs to happen this coming week:

- Local Experts will be pushing their council and admin to be active on Facebook and to get those emails out.
- Local Experts will be watching the RSVPs.
- I will be monitoring the Join rate on the event pages and the click-through rate on the Facebook ads
- I will write the media releases and the print ads for Cranbrook and Grand Forks and deal with the local newspaper of record on these.
- I will draft email \#2 (why it's important to come) and distribute to all communities

The Local Experts are using the information provided in their own innovative ways. For example, Fruitvale is putting the short-form promo up on their electronic bulletin boards, and Grand Forks is doing a formal announcement at their council meeting and will be giving hard copy to people who prefer that approach. Each community has its own ways of getting the word out, and that's great - I hope to capture information on these additional channels in the final report.

## Monday, March 3, 2014

Good morning, everyone:

This is your third weekly update.

This past week, I worked in partnership with Local Experts Kelly Thorsteinson (Cranbrook), Diane Heinrich (Grand Forks), and Jill Prince (Fruitvale), and together we got the following items done:

- Local Experts worked with their council and admin to be active on Facebook and to get those emails out.
- Local Experts watched the RSVPs.
- I have been monitoring the Join rate on the event pages and the click-through rate on the Facebook ads: These ads have proven very successful in producing event responses in Cranbrook and Grand Forks, less so in Fruitvale. The responses to the ads are starting to tail off, as they are now more likely to be shown to people who have already seen them once. However, we pay only if they click on the ad, so there's no harm leaving the ads up for the reminder effect.
- I wrote the media releases and the print ads for Cranbrook and Grand Forks and dealt with the local newspapers of record on these. Cranbrook has already done a follow-up interview with the mayor, and will be running a story. I hope that Grand Forks will come through as well.
- I drafted email \#2 (why it's important to come) and distributed to all communities
- I booked my accommodations

In the week to come, here's what needs to happen:

- I will be messaging all the "Maybe"s on Facebook and trying to move them into either the "Going" column or the "No" column. "Maybe" is such an irritating category!
- The Local Experts will be putting together their RSVPs and the Facebook "Going"s to create an overall list that will let us know when our numbers are getting close. I'd suggest that we take out lists to $10 \%$ over capacity to account for the people who say they'll come and then don't although there will also always be people who don't RSVP and DO turn up.
- I will be proofing the ads for Cranbrook and Grand Forks. In Fruitvale, thanks to the hard work locally, we already made the front page of the Fruitvale News, which goes to every household and is the publication people most rely on for local info.
- I will message every Facebook responder late next weekend with a "don't forget" message.
- I will send a "don't forget" email text to the Local Experts late in the week, so that they can forward them to everyone for sending to email lists.
- We will finalize the room set-ups.
- I will finalize the session designs and evaluation surveys and purchase all materials needed for the interactions.
- I will work through the Local Experts to ask the Mayors to say a few words opening each event.
- We will invite council and admin members to stay after the local event for 15 minutes to give me feedback while it's fresh in their minds.


## Sunday, March 9, 2014:

This is your fourth weekly update.

This past week, I worked in partnership with Local Experts Kelly Thorsteinson (Cranbrook), Diane Heinrich (Grand Forks), and Jill Prince (Fruitvale), and together we got the following items done:

- I messaged all the "Maybe"s on Facebook
- The Local Experts finalized overall attendee lists. Both Grand Forks and Cranbrook went over our expected numbers and our intended capacity, and I really appreciate the efforts of Kelly and Diane in working through this situation. In both cases, we added some capacity and managed the messaging to people RSVPing late, both on Facebook and phone/email. In Fruitvale, where we are not RSVPing, we are planning for a few extra people, as well.
- Print ads ran for Cranbrook and Grand Forks.
- Because the numbers were so high, we did not send out the third "don't forget" email.
- We finalized the room set-ups.
- I finalized the session designs and evaluation surveys and purchased and organized all materials needed for the interactions.
- Through the Local Experts, I provided each Mayor with opening remarks talking points.
- We invited council and admin members to stay after the local event for 15 minutes to give me feedback while it's fresh in their minds.

Tomorrow late afternoon, I will fly into Cranbrook. I pick up my vehicle on Tuesday morning and head off to Fruitvale. There will be stretches of time when I am not reachable, but here is my contact information for the week:

## Monday, March 17, 2014:

This is your fifth weekly update, and what a week it was!

This past week, we presented Community Conversation evenings in Fruitvale (Tuesday), Grand Forks (Wednesday) and Cranbrook (Thursday). Thank goodness we had good weather, because that final day back to Cranbrook would not have worked out if there were major road delays. I owe huge thank yous to the Local Experts (Jill, Diane and Kelly), who did a great job at the evening events, and to all of you (Patricia, Cher, Wayne, Deb, Wes) who came to participate, especially those who drove long distances to do so! It was particularly nice to see Andy Shadrack at the Cranbrook event.

We had around 40 participants at Fruitvale, around 75 at Grand Forks, and around 60 at Cranbrook. On the evaluation surveys, participants rated the events overall out of 10 . The scores were: Fruitvale 8.68, Grand Forks 8.81 , Cranbrook 8.96 , so l'd say the participants were happy. You will see all the detail from
the evaluations in the final reports. The mayor and council debriefs after the meetings were helpful, and I have a good sense of what people liked and what they would like to see changed.

The biggest success of the week was the animated discussion and good ideas from participants. The biggest disappointment was the numbers in Fruitvale and Cranbrook - in both places, we had strong advance indications that there would be more people.

My job for the next couple of weeks is to translate all the content from the meetings into a report, and all the "how-to" learnings from the project overall into a second report. I intend to have these draft reports to you all by April 1, so that any tweaks can be made before the presentation on April 11.

Thank you again for your help, your warm welcome, and your commitment to the success of this project.

## Monday, March 24, 2014

Good morning, everyone:

This past week, I checked in with you about the Creston presentation. The general response was that you preferred "Option 2", which was:

I prepare a presentation and power point and come to Creston to present the highlights, followed by my moderating a panel of Wayne, Patricia and Cher who would discuss what you liked and what you would change, based on the experience in your own community, then we'd all answer questions from the audience.

Accordingly, I went ahead and booked my travel and accommodation in Creston for the night of April 10 (harder to find than you might think!).

I have been working hard at transcribing the results from the three meetings, and should be finished later this afternoon. I will send the "raw data" from each of the three communities to those communities today - this is not the final report, it's just the information as it came off the tables. So it's not nicely formatted for general release yet, but I think it might be useful to the communities to have it as soon as possible. Please let me know if you would like me to NOT send this until after the general release.

As mentioned earlier, there will be two reports. One, of interest to the communities involved, will be about the content that came out of their meetings - how people answered the various questions posed. The second, of interest to AKBLG and to other communities who may wish to do something similar in future, will be about the process of organizing the meetings and what worked well and what should be tweaked. I am on track to have the draft reports ready by April 1, as per our schedule. It's my understanding that you will provide feedback on the reports, l'll update them, and we'll present the final draft at Creston. After that, it's my understanding that the report about content from the meetings will be available to the communities to do with as they will.

I have final attendance numbers from the three communities:
Fruitvale - 42, Grand Forks - 63, Cranbrook -- 52

Appendix D - Performance and costs of Facebook ads




## Appendix E - Text of Email Blasts

## Email 1 - "Hold the date":

I'd like to invite you to ...
Cranbrook Community Conversation
Thursday, March 13, 2014, 6:30 to 9:00 pm
Heritage Inn and Convention Centre, 803 Cranbrook Street North
Join a lively, facilitated discussion about questions such as:

- What are the issues Cranbrook should be talking about this year?
- What are the issues that you'd like more information about?
- How can we get everyone engaged in the municipal election this fall?

This is a conversation, not a presentation, and you will be a part of the action, not a part of the audience. Talk at round tables with your fellow citizens and your mayor and council, and share your ideas and your point of view, while also getting to hear the ideas of others. Don't worry about dinner a buffet will be provided.

The Association of Kootenay \& Boundary Local Governments and the City of Cranbrook are working together to host this community event. It's open to all citizens of Cranbrook - please feel free to forward this invitation!

We are limited by the size of the venue, so we'd like to know if you're planning to attend. Don't miss out - please RSVP to Kelly Thorsteinson at Thorsteinson@cranbrook.ca

## Email 2 - "Hope to see you there!":

Last week, you received an email about the Cranbrook Community Conversation, an evening event on Thursday, March 13 (6:30-9 p.m., Heritage Inn). I hope you're going to be able to RSVP soon, because our space is filling up fast.

Why should you be there?

- For an interesting evening of conversation
- To provide some input on what issues Cranbrook should be exploring in the coming year
- To help figure out how to get people involved in the municipal election

So mark that night in your calendar, RSVP soon to Thorsteinson@cranbrook.ca and we'll see you on March 13!

## Appendix F - Sample of media release and talking points

## Media release:



Settle down.

For immediate release
28 February 2014

## Grand Forks issues, fall election to be featured at community event

Grand Forks has been chosen by the Association of Kootenay and Boundary Local Governments as one of only three communities to host a special evening of conversation. Grand Forks residents will share their opinions with each other and with Mayor Brian Taylor and council at the event on March 12 from 6:30 to 9:00 p.m. at the Omega banquet room.

A lively and informal format is planned, with facilitated round table discussions about what "top five" issues Grand Forks citizens want to explore this year, what information they would like to have about municipal government, and how to get everyone engaged in the municipal election this fall.

When asked about the event, Mayor Brian Taylor said, "I'm pleased to see Grand Forks helping to lead the way in this regional initiative, and I'm looking forward to participating. It's a great opportunity to have an informal, but meaningful, conversation."

The Association of Kootenay and Boundary Local Governments (AKBLG) is working with three communities - Cranbrook, Grand Forks and Fruitvale - to offer these community conversations. Results will be shared with all members at the AKBLG annual general meeting in early April.

## Prepared by:

Leslie Taylor
403-762-3926

## For follow-up comment:

Mayor Brian Taylor
250-443-4177

## Talking points:

## Talking points for follow-up from media release

Prepared for: Mayor Brian Taylor, Grand Forks
Regional cooperation:

- We are active members of the AKBLG.
- Working together, we can try new projects and share information.
- Grand Forks was chosen for this pilot project because the AKBLG wanted one large community, one medium-sized, and one small. We are the medium community, the others are Cranbrook and Fruitvale.
- The results of this project will be presented to the AKBLG AGM on April 11. We will be sharing what we heard about issues and citizen engagement, as well as what we learned about organizing and marketing this type of community engagement on a cooperative basis.

The topics:

- An election year is always a time when citizens take a keen interest in municipal issues.
- We will be asking people what top five issues they would like to explore this year, what information they need to do that, and what we can all do to get maximum citizen engagement in the fall elections.
- We'll also include a fun warm-up exercise that has a bit of a message about the role and the challenges of municipal governments.

The logistics:

- March 12, 6:30-9 pm
- Omega banquet room
- We have capacity for about 60 people, so we're asking people to RSVP.
- Format is small groups at round tables, so that everyone gets a chance to speak up.
- A facilitator is designing and MCing the evening, so mayor and council get a chance to sit in and participate with everyone else.
- A light buffet will be provided, to make it easier for people to come out over the dinner hour.
- All costs are being covered by AKBLG, with the funding assistance of Columbia Basin Trust

