



Making a difference...together

## REPORT TO GOVERNANCE COMMITTEE MEETING OF WEDNESDAY, FEBRUARY 07, 2024

---

**SUBJECT**     **CRD Engagement Practices and Platforms**

### **ISSUE SUMMARY**

This report summarizes current engagement practices and platforms used by the Capital Regional District.

### **BACKGROUND**

On December 6, 2023, the Governance Committee heard a presentation by Director Tobias introducing an engagement tool developed for and implemented by the Environmental Assessment Office (EAO) using the name EPIC. Following the presentation, a motion arising directed staff to “report back on current engagement platforms utilized by CRD and the implications of implementing the provincial engagement tool presented by Director Tobias.”

This report provides background on the current engagement platform in use by the CRD, as well as identified opportunities and issues with procuring or implementing the tool presented.

### ***Current Engagement Practices at the Capital Regional District***

The CRD is guided by a Board-approved Public Participation Framework which aligns with best practices shared nationally within Canada by the International Association of Public Participation (IAP2). CRD’s Corporate Communications division is responsible for public participation initiatives, defined as “opportunities for community members to have a say on issues and decisions that matter to them”. Each initiative is then resourced and implemented at the program level, with corporate oversight.

In 2021, Corporate Communications acquired and launched an online public engagement platform, GetInvolved.crd.bc.ca. The platform was the result of a 3-month planning and competitive procurement process with input from staff representing 12 divisions within the CRD. An internal selection committee reviewed 3 proponents, eventually selecting Bang the Table, now named EngagementHQ. This was done after a rigorous requirements gathering process to identify more than 70 distinct requirements that focused on the organization’s need for functionality, flexibility & scalability, vendor support/training, accessibility, security, and privacy. Since launching GetInvolved.crd.bc.ca, the CRD has used it to engage with residents about 12 initiatives with an additional 8 projects planned or underway in 2024.

As a regional district, the CRD consults on regional, sub-regional and local electoral area initiatives. Given the variety of services and decisions to be made by the CRD Board and delegated commissions, the staff approach is to be consistent but not uniform. This means sharing examples of previous surveys and question types internally, as well as survey training and review to ensure surveys adhere to privacy requirements and organizational standards. Staff can and do adjust surveys and other data collection methods to best meet the subject matter requirements and objectives of each initiative.

Corporate Communications has positive collaborative relationships with municipal communication colleagues, which were strengthened during the pandemic as each organization saw rapid change in the use of digital tools for public engagement. CRD staff also plan to collaborate with the Comox Valley Regional District and Nanaimo Regional District to ensure our public engagement policies and practices align with our commitments to equity, diversity, inclusion and accessibility. A summary of platforms in use by local municipalities and other regional districts is attached as Appendix A.

### ***About the Tool***

CRD staff met with AOT Technologies, the company that built the platform for the EAO, and confirmed the underlying platform is named Modern Engagement Tool (MET). The platform is open source, which allows for modification or reuse by other organizations. Since its launch in 2021, another instance has been set up by the Province as part of its Government Digital Experience (GDX) unit to enable potential use in future by other public sector bodies.

The main elements of the platform include:

- Interactive and accessible features for information sharing and data collection (surveys)
- Compliance with strict privacy and security requirements and legislation
- Reduced licensing costs as an open-source solution, with continued costs for maintenance and hosting
- Ability to integrate with BC Services Card or other common providers to verify identity.

The following concepts would require additional design and development work. This could be done by requesting a separate code set to be customized, hosted and maintained by the CRD or a third party.

- Survey templating and data sharing models between local governments
- Ability for users to register and subscribe for updates from more than one organization.

Without a fulsome evaluation or proposal, it is difficult to assess in detail how the platform meets or would need to be modified or enhanced to meet the CRD's needs. That said, the security and privacy requirements the Province of BC has are likely similar to those of the CRD. These include data security measures, robust platform maintenance and security patches, access controls, and ensuring data collection and access is highly controlled. Any work to enable data sharing between organizations would require a robust data-sharing agreement, strong oversight and additional development and configuration.

Identity management is another common area of interest between the CRD and other governments. Work related to this concept, including potential use of the BC Services Card, is part of work underway to develop an organizational digital strategy. However, the CRD is unlikely to leverage this type of authentication for public engagement projects as feedback from participants to date has been that any registration or login is a barrier to participation. Furthermore, it is unlikely that the collection or use of a personal digital identity as part of a public engagement project would be approved by the CRD's Information Security and Privacy division unless it is required to be able to deliver a service or meet a specific engagement goal.

## **IMPLICATIONS**

### *Alignment with Existing Plans & Strategies*

Corporate Communications plans to initiative a competitive and open procurement process for an engagement platform in early 2025. This process may result in reacquiring EngagementHQ or purchasing an alternative solution based on best value as well as ability to adapt to emerging needs. The timing of this work is intended to follow an update to the CRD's public participation framework in 2024, initiated to ensure alignment with Board direction to apply an equity lens as well as promote participation in local government. The work done in 2024 will also help inform any changes to organizational requirements ahead of procurement in 2025.

### *Resource Implications*

The CRD uses a decentralized model for public engagement with corporate oversight through the Corporate Communications Division. The 2025 timeline for procurement is based on existing commitments for Corporate Communications, including work to update the CRD public participation framework and to modernize the CRD website in 2024. Acquiring or implementing a new tool sooner would result in these projects being deferred or delayed as they rely on availability of the manager responsible.

Beyond delivering and hosting the platform, the CRD also relies on vendor support for training, troubleshooting and ongoing advice. Without this type of support provided along with the platform, the CRD would need to look at additional internal resourcing to be able to support ongoing growth and use of the platform by a mix of staff and contractors.

### *Financial Implications*

Any cost estimates for implementing MET as an engagement platform for the CRD would be considered preliminary until a full procurement process is underway. Based on initial information shared, there would be costs associated with modifying the platform as well as migrating it to a cloud hosted solution, with ongoing maintenance costs and a service level agreement to ensure the platform remains secure and available.

While it was suggested that the current developer could be contracted, any solicitation of service must be competitively procured unless a non-competitive exemption applies. CRD is prohibited from "buying local" where above trade-agreement thresholds (typically \$75,000 for goods and services and \$200,000 for construction in policy).

### *Legal Implications*

The CRD's policy, BRD14, "Procurement Policy", as well as CRD's trade agreement obligations, require purchases to be acquired by way of competitive procurement, unless a relevant non-competitive procurement option is approved. The Chief Administrative Officer is delegated up to \$5-million in transactional authority for purchases of goods, services, and construction under Bylaw No. 4186, "Capital Regional District Delegation Bylaw No. 1, 2017", and under the CRHC Delegation of Authority Policy.

The total value of a procurement is the total value of all extensions and the entire process – for

example, if a software product is \$25,000 per year with a four-year term, this would be a total of \$100,000. While there is a relevant exemption for purchases from public authorities, such as the Province of British Columbia, it would be unusual to acquire software without considering in full CRD's process requirements, business needs, available budget, and what alternative tools are available in the marketplace.

Based on preliminary findings, any work done by a software developer to modify or maintain the tool would be considered subject to the CRD procurement policy. This means AOT Technologies could be approached to solicit a bid for a future RFP, or alternatively MET could be considered at the time as a comparable product.

### *Intergovernmental Implications*

The opportunity to collaborate with other organizations is of interest to the CRD, provided there is an understanding that each organization and initiative has unique needs. Staff have reached out to colleagues within GDx to better understand their use of the tool and to gauge interest in future collaboration. The concept of a single platform for regional and local governments would require further analysis with input from municipalities to determine interest in and feasibility of a shared platform.

The MET platform supports a multi-tenant solution, which means it is possible to create 'hubs' administered separately by individual organizations. This ability was not considered in the requirements for the CRD's current platform but can be added as a consideration for future procurement should there be interest among other local governments in a shared solution.

### **CONCLUSION**

The CRD has an existing engagement platform in place and is planning to review and update its public participation framework in 2024, ahead of running a competitive procurement process for online engagement solutions in 2025. The CRD would consider a proposal to use the MET platform alongside other proposals for engagement at that time.

### **RECOMMENDATION**

There is no recommendation. This report is for information only.

Submitted by:	Zoe Gray, Manager, Website & Public Engagement
Concurrence:	Andy Orr, Senior Manager, Corporate Communications
Concurrence:	Chris Hauff, Senior Manager, Technology & Digital Transformation
Concurrence:	Kristen Morley, J.D., General Manager, Corporate Services & Corporate Officer
Concurrence:	Ted Robbins, B. Sc., C. Tech., Chief Administrative Officer

### **ATTACHMENT(S)**

Appendix A: Summary of Engagement Platforms – Local Governments & Regional Districts