Shifting Strategy: From the Campaign Trail, to Community Engagement

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Note: Some of the terminology used in this case is specific to Canada. There is a glossary provided at the end of the case.

Aldous Sperl took a break from his Twitter feed. A lot had changed since the night before, when his boss had won the recent election for the riding of Saanich North and the Islands, located in the southern tip of Vancouver Island, on the west coast of British Columbia (BC), Canada's westernmost province. In the blink of an eye, Aldous had gone from serving as campaign manager in a hard-fought election, to Chief of Staff for the newly elected Member of the Legislative Assembly (MLA) of the riding. This had been the breakthrough election for his party (the BC Green Party), which had won a seat in the riding and formal party status for the first time in the province's history. While the campaign team was still celebrating, Aldous had come into the office early, eager to start on the work to be done to transform what had so recently been a busy, partisan campaign office into the local constituency office.

Part of the communication challenge Aldous faced was ensuring all constituents' understanding of the work of the constituency office. As a second tier of government, subordinate to the federal government, the provinces had the authority to govern the application of provincial laws and the implementation of federal-funded health provision. The provincial government was responsible for policy on education, land use legislation, resource management, housing, and transportation. Once elected, the MLA's role was to provide information on government services, assist citizens in navigating government bureaucracy and ensuring due process, attend community events, and hear concerns from the public on a wide variety of issues.

The major part of the challenge was to engage all constituents in non-partisan, participatory democracy at the local level. Like many democracies, Canada's political system was characterized by a first-past-the-post, "win at all costs" party system that had led to voter cynicism and the absence of collaboration and cooperation "across the aisle." Introducing a more dialogue-based process of provincial governance through proportional voting was a major plank in the BC Greens' election platform. As the MLA's Chief of Staff, it would be up to Aldous to create a plan for realizing a vision of full civic engagement, starting with the constituency itself.

Just then, Aldous' phone rang—it was his boss on the other end: "Aldous, once we've finished hiring our staff, I want to begin ongoing community consultations, starting in about two weeks

from now. We need an engagement strategy to reach everyone in our constituency. We already have a fair bit of data from the campaign, but our goals have changed and we likely are missing the full picture of who we need to invite into the circle. Please schedule a meeting with me tomorrow to discuss the outlines of a plan. And hold on to that research! We might be able to use it again for other projects." Explaining that he was already on task, Aldous hung up, fired up his laptop, and started thinking about how to put together a strategy…

The Constituency
There were barriers to community building in a constituency comprised of over 100,000 people in three municipalities (North Saanich, Town of Sidney, and Saltspring Island), a number of the smaller Gulf Islands with their own small economies, and four First Nation reserves (home to the Tsartlip, Tsawout, Tseycum, and Pauquachin First Nations) belonging to the great Saanich Nation, each of them with their own elected Chief and Council and hereditary system of governance. Characterized by pockets of diverse and sometimes competing economic, social, and cultural interests in a geographically diverse area, people who lived and worked in the region did not necessarily recognize themselves as members of a shared community.

The constituency featured a fairly mixed economy. Major employers included a major BC Ferries terminal at Swartz Bay (providing Vancouver Islanders with access to the mainland and smaller islands), as well as the Victoria International Airport in Saanich, each surrounded by marinas, farms, industrial parks, and residential communities (wealthy and marginalized). This was a region characterized by wide socioeconomic, ethnic (particularly new immigrants, many of them with mother tongues other than English), and generational diversity (e.g., young families, middle-aged "empty nesters," and senior citizens), and a mix of small business, medium enterprises, and residential areas in each of the municipal districts. Employment rates were high in the region, but many senior citizens were concerned with rising property taxes and rising prices. Minimum-wage workers and students struggled to find affordable rentals, causing a hiring crisis among small business owners and particularly those involved in construction or the hospitality industry. One key tension lay in the competing interests of developers and groups concerned about climate change, conserving natural heritage, upholding Indigenous rights and self-governance, and shifting to a green economy.

Transportation throughout the region was mixed (car, ferry, public transit, private transportation), but without a vehicle, it was difficult for people to move around easily. Cutbacks to ferry sailings had been a hot button issue during the election, affecting citizens' ability to work and live in their island communities, as well as the many businesses dependent on tourism in the region. For decades, residents of Saltspring Island and the smaller Gulf Islands in the region had commuted between home and the mainland for work, school, youth sports, shopping, and entertainment, but the price of each trip was rising, making "Island life" difficult for old-timers and newcomers alike. Part of the BC Green Party's platform was to legislate improvements to transportation infrastructure to provide better service to non-drivers and to create bike lanes and other safety features that could turn more drivers (especially commuters) into cyclists, pedestrians, and frequent users of the bus system. Dialogue and systems thinking was needed to quell the tensions between business, drivers, cyclists, and pedestrians.

A particularly hot button issue was the housing crisis, driving a soaring real estate market and a lack of affordable rentals for individuals and families. Over the past 10 years, house prices had risen dramatically due to the influx of new owners who had sold their homes in the overheated real estate market of Vancouver, BC, a two-hour ferry ride from the Swartz Bay terminal at the tip of the Saanich peninsula. The Town of Sidney, for example, featured a high ratio of retirees on fixed incomes, many of whom rented, while more wealthy senior citizens owned their own condominium or single-family residence. At the same time, many young families had moved into the area from Vancouver, seeking adequate school and daycare for parents who commuted into downtown Victoria, creating diverse demands on Sidney's municipal council.

This constituency also included a significant Indigenous population. The MLA, himself a member of Tsartlip First Nation, was well aware of his community's struggles with inadequate housing, health care, and education, as well as their aspirations for cultural and language renewal and a "nation-to-nation" relationship with government. His election followed closely on the findings from the historic national Truth and Reconciliation Commission consultations held between 2008-2015, which had concluded with 93 Calls to Action to all Canadian citizens and institutions in the work of repairing the personal, economic, legal, and cultural harms inflicted on Indigenous peoples during the 150-year era of the brutal Canadian Indian Residential School system. The MLA's party took was committed to playing a key role in reconciliation and meaningfully involving First Nations in all aspects of the constituency's work. In addition to working with mayors and councilors in the three municipal regions falling within the constituency boundaries, it was important for the constituency office to negotiate partnership relationships with the First Nation Chiefs and Councils, as the constituency office had run on a platform to expressly involve local Indigenous voices and vision in its work.

Aldous' strategic communication goal was for everyone in those distinctive communities and demographics to feel welcome and involved in their own government. Aldous knew he should map out the various groups that needed to be included, before going any further with an engagement strategy.

Devising a Plan
Aldous needed to go back to the drawing board and conduct a stakeholder analysis. This was the first and an essential step in devising a 4-year strategic communication plan for realizing the vision of widespread citizen engagement in the democratic process. While Aldous' campaign team had done a similar exercise in the context of the election with the same data, it was all in aid of winning a seat in government. With the seat secured, it was necessary to shift to a goal of non-partisan collaboration, which meant that the types of stakeholders would also needed to change, just as they would change again when the constituency office tackled future projects or issues.

With just a few days to put together an evidence-based engagement strategy, time was short, and he needed to get organized. First, he needed to collect various data about the election

riding, to identify regional and demographic interests and concerns. He started by printing out three documents (located at the end of the case):

- a file called *Census Data*, which he'd created a few months ago from the latest census for Saanich and Gulf Islands, a federal electoral area that mapped quite closely onto the Saanich North and the Islands provincial constituency boundaries;
- a copy of the *Constituency Fact Sheet* he'd made for his boss to use as a quick guide to the micro-economies, geography, and demographics across the different municipalities, island communities, and First Nations that made up the constituency; and,
- a copy of the *BC Green Party's Election Platform* one-pager, which his team had used as a "cheat sheet" in the period leading up to the election.

Then, he needed to use that data to identify and prioritize stakeholder groups, clustering them according to their salience to the strategic goal of gaining full engagement of all constituents, not just those who were the loudest or most supportive of his party. Along with the *Census Data,* he would use the *Constituency Fact Sheet* to: a) understand the diversity of the constituency, and b) inform his work of assigning types to stakeholders and understanding their salience to his strategic goals. The *BC Green Party's Election Platform* would help him connect the Green's mandate to the concerns and potential contributions of various stakeholder groups. Finally, he would need to consider key messages likely to engage each group, the communication channels most likely to reach various stakeholder groups, and to note other considerations arising during his analysis.

Spreading out the documents on his desk, he started to map out the outline of an engagement strategy for the constituency office…

Census Data

2016 Canadian Census Data for Saanich and Gulf Islands	Total	Male	Female
Household and dwelling characteristics			
Total - Occupied private dwellings by structural type of dwelling - 100%	*44,960*	*…*	*…*
Single-detached house	27,390	…	…
Apartment in a building that has five or more storeys	335	…	…
Other attached dwelling (e.g., townhouses, suites in houses, & < 5 storey buildings	16,550	…	…
Age characteristics			
Total - Age groups and average age of the population - 100%	*107,340*	*51,390*	*55,950*
0 to 14 years	13,180	6,710	6,470
15 to 19 years	5,840	2,930	2,905
20-64	57,340	27445	29,915
65 years and over	30,970	14,310	16,660
First official language spoken			
Total - First official language spoken for the total population	*106,210*	*50,930*	*55,275*
English	103,540	49,760	53,780
French	1,250	580	670
English and French	275	125	145
Neither English nor French	1,145	465	680
Highest certificate, diploma or degree			
Total – Highest certificate, diploma, or degree	*91,940*	*43,770*	*48,170*
No certificate, diploma or degree	10,305	5,250	5,060
Secondary (high) school diploma or equivalency certificate	25,540	11,530	14,015
Postsecondary certificate, diploma or degree	56,090	26,995	29,100
Labour force status			
Total - Population aged 15 years and over by Labour force status	*91,945*	*43,770*	*48,170*
In the labour force	52,140	26,340	25,800
Employed	49,370	24,850	24,520
Unemployed	2,770	1,495	1,275
Not in the labour force	39,800	17,430	22,370
Class of worker			

Total labour force aged 15 years and over by class of worker	*52,140*	*26,340*	*25,800*
Employee	41,410	20,095	21,315
Self-employed	9,890	5,805	4,085
Industry - North American Industry Classification System (2012)			
Total labour force population aged 15 years and over by Industry	*52,140*	*26,345*	*25,800*
(falls outside of classification system)	845	445	400
All industry categories	51,300	25,895	25,400
11 Agriculture, forestry, fishing and hunting	990	600	395
21 Mining, quarrying, and oil and gas extraction	160	140	20
22 Utilities	105	85	20
23 Construction	3,450	3,080	370
31-33 Manufacturing	2,030	1,460	570
41 Wholesale trade	1,005	670	335
44-45 Retail trade	5,555	2,765	2,790
48-49 Transportation and warehousing	2,470	1,785	685
51 Information and cultural industries	950	580	365
52 Finance and insurance	1,600	685	920
53 Real estate and rental and leasing	1,165	650	510
54 Professional, scientific and technical services	4,620	2,650	1,965
55 Management of companies and enterprises	65	20	45
56 Administrative and support, waste management and remediation services	2,335	1,365	970
61 Educational services	4,750	1,670	3,080
62 Health care and social assistance	6,525	1,415	5,110
71 Arts, entertainment and recreation	1,720	750	970
72 Accommodation and food services	4,565	2,005	2,555
81 Other services (except public administration)	2,055	870	1,180
91 Public administration	5,175	2,645	2,535
Main mode of commuting			
Total - Main mode of commuting for the employed labour force	*43,075*	*21,660*	*21,415*
Car, truck, van - as a driver	31,830	16,335	15,490
Car, truck, van - as a passenger	2,160	765	1,395

Public transit	3,555	1,530	2,025
Walked	2,540	1,105	1,430
Bicycle	1,925	1,290	640
Other method	1,070	635	440
Mobility status - place of residence 5 years ago			
Total - Mobility status 5 years ago	*101,260*	*48,665*	*52,595*
Non-movers	64,685	30,980	33,705
Movers	36,570	17,685	18,890
Non-migrants	18,520	8,985	9,540
Migrants	18,050	8,705	9,345
Internal migrants	14,665	7,135	7,520
External migrants	3,385	1,565	1,825
Family characteristics			
Average size of census families	2.7	...	...
Total number of census families in private households	*31,985*	...	...
Total lone-parent families by sex of parent	3,720	...	...
Female parent	2,835	...	...
Male parent	885	...	...
Total - Couple census families in private households	28,265	...	...
Couples without children	17,115	...	...
Couples with children	11,145	...	...
Income data			
Total - Household after-tax income groups in 2015 for private households	*44,965*	...	...
$0 to $9,999	1,335	...	...
$10,000 to $29,999	10,340	...	...
$30,000 to $69,999	19,389	...	...
$70,000 to $99,999	18,580	...	...
$100,000 and over	12,850	...	...
Aboriginal population			
Total - Aboriginal identity for the population in private households	*105,110*	*50,495*	*54,615*
Visible minority population			

Total visible minority population	*15,310*	*7,225*	*8,085*
South Asian	3,285	1,595	1,690
Chinese	6,795	3,230	3,565
Black	705	365	340
Filipino	1,185	455	725
Latin American	530	245	285
Arab	215	125	90
Southeast Asian	470	250	220
West Asian	225	120	105
Korean	640	280	365
Japanese	740	315	425
Multiple visible minorities	395	180	215
Household characteristics			
Total - Private households by tenure	*44,975*	...	...
Owner	35,545	...	...
Renter	9,360	...	...
Band housing (on First Nation Reserves within the constituency)	60	...	...
Total - Private households by age of primary household maintainers	*44,970*	...	...
15 to 34 years	4,210	...	...
35 to 54 years	12, 320	...	...
55 to 74 years	19,970	...	...
75 years and over	11,750	...	...
Total – Owner/tenant households with household total income > zero	*43,265*	...	...
Spending less than 30% of income on shelter costs	32,995	...	...
Spending 30% or more of income on shelter costs	10,265	...	...

Source: Statistics Canada. 2017. Saanich--Gulf Islands [Federal electoral district], British Columbia and British Columbia [Province] (table). Census Profile. 2016 Census. Statistics Canada Catalogue no. 98-316-X2016001. Ottawa. Released November 29, 2017.
https://www12.statcan.gc.ca/census-recensement/2016/dp-pd/prof/index.cfm?Lang=E

Constituency Fact Sheet

Municipality of Saanich
Population: 120,939
Labour Force: 59,340 > majority work in: health care, administration, public administration, retail and trade.
Median Age: 44.7
Median household income: $77,282

Town of Sidney
Population: 11,286
Labour force: 4730 > majority working in: health care, social assistance, retail trade, accommodation and food, transportation (international airport, ferry terminal, marinas) and warehousing.
Median age: 60.4
Median income: $60,840

Saltspring Island
Population: 10,557 (largest island community–182.7 sq. km/70.5 sq. miles)
Labour force: 5205 > majority working in: sales, service, trades, transportation, equipment operators, management operations. Significant ferry commuter population.
Median age: 55.4
Median income: $59,077

Southern Gulf Islands: Galiano, Mayne, Pender, and Saturna
Population: 4732
Labour force: 2070
Median age: 62.6
Median income $54,037
Small population serves as summer vacation destination for mainlanders, with an economy based on small retail, micro- breweries, artisans, and farmers' markets. There are schools and community associations on each island, with year-round ferry service to the Swartz Bay terminal (in North Saanich) and the mainland(where Vancouver is located).

Data sourced from municipality websites: North Saanich – https://www.saanich.ca/; Town of Sidney – http://www.sidney.ca/; Saltspring Island – http://www.saltspringisland.org/; Southern Gulf Islands – http://southerngulfislands.com/

BC Green Party Election Platform

Indigenous Relations	Transportation	Natural Resources
- Respect court decisions - Adopt the UN Declaration on the Rights of Indigenous People as a framework - Resolve Aboriginal Rights and Title issues	- Increase transit funding by $25 million to increase service and reduce fares - Support the transition to electric vehicles with new vehicle-charging infrastructure	- Restore trust in the Environmental Assessment process - Plan for forest, fisheries, lands resiliency (long-term thinking) - Respect indigenous resource rights and title
Health	**Income Security**	**Affordable Homes**
- Create new departments and ministerial portfolios: health and mental health - Expand funding for in-place care for seniors and others - Provide funding for more social workers	- Increase income assistance - Introduce a universal guaranteed basic income strategy, on a pilot basis - Raise minimum wage - Provide income support for foster children 18-24	- Implement a provincial housing plan for renters - Eliminate property speculation - Create 4000 units of affordable housing
Education	**Childcare and Pre-school**	**Climate Change**
- Increase funding for schools and teacher training - Increase grants and reduce post-grad tax for post-secondary students - Design education for a new economy	- Respond to demand for a mix of free early childhood education and daycare for working parents, single parents, and families with a stay at home parent	- Create policy to reduce greenhouse gas emissions (behavior, efficiency, low carbon fuels/materials, sinks) across all sectors
Agriculture	**New Economy**	**Democracy**
- Prioritize food security - Partner with Indigenous communities - Protect agricultural land - Support the sector with research and incentives to farm	- Modernize business environment (taxes, labour laws) - Support the growth of sustainable enterprises (tech sector) - Encourage "green" innovation (energy/tech)	- Replace first-past-the post, "winner-takes-all" electoral system; elect MLAs in proportion to the popular vote - Control lobbying by previous MLAs and staff - Create a new position of Chief Budget Officer to track spending

Glossary

Riding	A term used in the Canadian (British) parliamentary tradition to refer to an electoral district or legislative ward.
Member of the Legislative Assembly (MLA)	The title given to Canadian elected representatives at the provincial level of government (except for the province of Québec and the territory of Nunavut).
Province	The term for the second tier of government in Canada. In the United States, the regional corollary of the provinces would be the state.
Constituency	A body of voters represented by an elected official. The function of the constituency office is to support citizens in accessing provincial services.
Reserves	The name for the small parcels of land set aside by the Canadian government for forced containment of the original peoples, during the period of colonial settlement, and called "reservations" in the United States.
First Nation, Indigenous, Aboriginal	Distinct but related terms referring to the original people of what is now Canada. "First Nation" refers to each of the 614 groups ("bands") that signed treaties with the colonial government and that have legal status under the Indian Act. Increasingly, the term "Indigenous" is the preferred collective noun for First Nation, Métis (Indigenous/French heritage), and Inuit peoples (northern) rather than the collective terms "Aboriginal" or "Indian" (a term commonly used in the United States).