

# Maritimes Engagement Tracker Guidance Document

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## Background and progress to date

The Maritimes Engagement Tracker (MarET) was originally proposed as part of the Stakeholder and Partner Engagement Project (SPEP). SPEP was a one-year project undertaken by Policy & Economics' (P&E's) Policy Research Division (PRD). Its goal was to analyze how engagement with groups external to Fisheries and Oceans Canada (DFO) is conducted in the Maritimes Region, and to recommend options to further streamline external engagement processes. P&E presented its final recommendations to the Senior Executive Table in June of 2020 and received unanimous support. One of these recommendations was to establish an engagement coordination database.

Since then, PRD has worked in partnership with Science Branch's Ocean Data Information Section (ODIS) to identify the right platform, and then develop the engagement coordination tool. After working through a business intake process, PRD and ODIS agreed that the best path forward would be to use DM Apps (or Data Management Applications) as a platform. DM Apps was built in-house by Gulf Region's Science Branch, and is a popular option due to its accessibility, flexibility, and affordability.

Using lessons learned over the course of SPEP and data that had previously been compiled on the Region's contacts and various committees and working groups, PRD created an initial data model for MarET. ODIS staff applied updates to this model and built the tool, then imported that existing data. PRD and ODIS have met weekly to touch base on adjustments and over time have finely honed MarET into a tool that could be helpful to the Region.

MarET was then taken on the road and workshopped with groups across the Region. PRD sent a call-out to Regional Integration Committee (RIC) members in March of 2022 to request contacts from regional branches and area offices to include in workshops. From March 2022 through to July, nine workshops were held throughout the Region, and included staff from: Southwest Nova Scotia, Communications,

Southwest New Brunswick, Aquatic Ecosystems, Eastern Nova Scotia, the Associate Regional Director General's Office, the Regional Director General's Office, Small Craft Harbours, Real Property, Safety and Security, the Indigenous Relations and Partnerships Hub, the Atlantic Fisheries Fund, Fisheries Management, and Science. Some of the sessions were stand-alone meetings, while others were added as agenda items to recurring team meetings. These sessions included a presentation of background information about the project, a description of the project's linkages to the National Engagement and Consultations Tracking Registry (NECTR, discussed further below), and a demonstration of the beta tool. Participants were then asked for their feedback on the functionality of the tool, and for their thoughts on the types of engagement activities that their groups may track in MarET. Feedback was received and implemented as this work progressed.

The project has now moved into the piloting and roll-out stage. Given P&E's support role for work relating to Marine Conservation Targets (MCTs), P&E reached out to the Marine Planning and Conservation (MPC) team to discuss piloting opportunities. After discussions with Aquatic Ecosystem's MPC, Marine Spatial Planning (MSP), and Engagement and Partnerships groups, it was decided that MSP would be a good team with which to begin the piloting process. While MSP staff do conduct engagement, they are currently in between waves of engagement. Staff are currently entering information from previous engagement initiatives, flagging any potential bugs or process enhancement suggestions as they go. PRD and ODIS can then make any necessary adjustments to ensure that MarET fully meets MSP's requirements before their engagement work starts again in the fall. P&E is simultaneously exploring piloting opportunities with other regional teams. Pilot expansion is expected to take place over late summer and early fall of 2022, with a potential for full regional roll-out this winter.

## Purpose

The main goal of MarET is to improve the Maritimes Region's engagement with partners and stakeholders by further coordinating regional efforts. As DFO works on many complex issues that involve intersectoral, interregional, interdepartmental, and intergovernmental collaboration, it is important that employees have mechanisms and procedures in place that support them as they discuss horizontal or high-priority files internally and with external partners and stakeholders. There are several intended benefits to MarET:

1. To reduce partner and stakeholder burnout by avoiding engagement with a group multiple times on the same or similar topics. DFO staff will be able to search the tool and see if any regional colleagues plan to engage that external group at a similar time or about a similar topic, and plan accordingly.
2. To improve consistency of DFO messaging through increased internal awareness of departmental interactions with partners and stakeholders. The aim is to help staff avoid situations where certain key stakeholders or partners are either sent conflicting invitations to DFO engagement sessions, or receive inconsistent messaging about a given topic. These situations have the potential to irritate partners and stakeholders, hamper relationships, and, as a result, reduce the amount of feedback that they provide. These situations can also negatively impact DFO staff morale.
3. To improve the Region's ability to quickly and easily identify interactions that contribute to regional priorities. For example, MarET would help us report how many meetings have been held on a given priority topic or with a given external group. This will help with regional planning

processes, such as populating performance management agreements and tracking progress on regional Areas of Focus. It will also help to ensure that no departmental ties to a given contact or organization are overlooked in the development of products such as scenario notes.

4. To streamline DFO engagement work in the long term. The end goal is that by further coordinating our engagement, our efforts will be more efficient and will result in improved processes that result in better relationships internally as well as with external partners and stakeholders. Improving our relationships with partners and stakeholders will help us to refine and deliver on our departmental mandate. This work contributes directly to our 2022-23 regional Management Priority to “define roles and procedures to manage workload and maximize efficiencies”, and will also contribute to the Management Priority to “drive innovation through strategic collaboration”.

## Scope

Although there is flexibility for regional users/work units to determine the scope of engagement activities to be included in MarET for themselves, the overall intention is to capture engagement that might fall into one of the following categories:

1. Formal, recurring engagement venues. This includes formal committees, working groups, advisory committees, etc. involving external partners or stakeholders (outside of DFO).
2. Interactions that potentially involve horizontal or strategic topics. If the topic might be relevant to work being undertaken in another branch or area office in the Region, it is recommended that it be entered in MarET so that other regional staff will be aware if it comes up in other conversations, or if related work or discussions are being planned.
3. Interactions that may necessitate elevation for decision or discussion. If it is a high-priority or potentially controversial topic that the stakeholder or partner might raise at a higher operational level (e.g. if they were to meet with the Regional Director General, Deputy Minister, or Minister, it is recommended that it be entered in MarET so that it can be captured in relevant briefing materials.

Based on the three high-level guiding principles above, the scope of use of MarET is intended to be left up to the best judgement of branches and area offices. The main purpose of MarET is to be helpful to regional staff, and regional staff are best placed to determine what may or may not be useful to capture.

It is worth emphasizing that MarET is not intended to include every single interaction with an external partner or stakeholder. Where there are mechanisms already in place that facilitate adequate information sharing at the operational level, a transition to MarET may not be required. The intent of MarET is to capture and address information sharing gaps that have an impact on partner and stakeholder relationships. Furthermore, the tool has been designed to capture fairly high-level information, so as to reduce reporting burden. Care has been taken to ensure that enough information is captured to make the entries useful (i.e. who has been engaged on what general topics, and who can DFO staff reach out to for more information), while refraining from including so many data fields as to create an unnecessary reporting burden.

Additional guidance with respect to the scope of MarET:

- It is not intended to capture consultations or other interactions that are held solely with Indigenous partners. These interactions are already captured in iHub (see “Connection to iHub” section below), and therefore do not need to be duplicated. However, if a representative of an Indigenous community or organization is present at a meeting that involves other entities (for example, an advisory committee meeting), this would still fall within the scope of MarET.
- DM Apps can only store Unclassified information. MarET is not intended to contain records of discussion or extensive notes about interactions. Its purpose is to flag to staff that interactions with certain groups or about certain topics have occurred or will occur, and to indicate the relevant people who can be contacted for further information.
- Past, present, and future/planned interactions can all be entered into MarET.
- For some groups in the Region that conduct a lot of engagement, it may be beneficial to roll out the tool in phases by incrementally broadening the scope of interactions to be captured. For example, perhaps only interactions involving the Minister or Deputy Minister are included at first, then over various phases the scope is expanded to include interactions involving the Regional Director General, Associate Regional Director General, Regional Director, etc. This phased approach could help staff become more comfortable with the tool over time, before it is fully adopted.

## Connection to iHub

iHub already existed when MarET was being designed. Both tools are in DM Apps. iHub is already used by many groups across the Department (mainly by Indigenous Relations and Partnerships Hubs, though some other groups use it as well) and captures consultation and collaboration work between the Department and Indigenous partners. As such, it was decided early on that such activities would not be included in MarET, to avoid duplication. However, as mentioned above, there are times when there could be overlap – for example, when representatives from Indigenous communities or organizations attend advisory committee meetings, or other similar forums that do not focus primarily on consultation with Indigenous partners. These would be recorded in MarET.

Instead of duplicating consultation tracking work already being recorded in iHub, MarET is built to allow for maximum information sharing between the two tools. MarET and iHub both pull from the same master contact and organization lists in DM Apps, though iHub only uses a subset of these lists, whereas MarET includes all contacts and organizations. The path forward on information sharing between the two tools is still being discussed. To avoid a situation where a MarET user may accidentally alter an iHub entry, contacts or organizations that are “owned” by iHub cannot be edited through MarET.

## Connection to NECTR

At the same time as MarET was being designed and built, similar work was underway in NHQ to develop an engagement tracking tool to be used throughout DFO and CCG. This tool is called NECTR: the National Engagement and Consultations Tracking Registry. Once NECTR is operational and has all the functionalities of MarET that Maritimes Region staff require, it is anticipated that MarET will be

migrated to NECTR. Even though a national tool is being developed, work on MarET is continuing for the following reasons:

1. It is anticipated that MarET will be ready before NECTR is, so continuing with the rollout of MarET will give the Region a tool to use while NECTR is still being developed and finalized.
2. Having relevant information loaded into MarET will make the transition to NECTR much smoother.
3. Continuing with the implementation of MarET will help to uncover functionalities that Maritimes Region staff require of an engagement tracking tool. PRD is sharing these requirements with the NECTR Secretariat so that they can be implemented in NECTR. In this way, we can be sure that NECTR will suit our needs once it is rolled out. PRD has been participating in the NECTR Working Group, to pass along lessons learned from SPEP and MarET, and to relay information back to regional contacts and seek input. Furthermore, a NECTR representative participated in many MarET workshops, so that feedback shared at those meetings could inform both tools simultaneously.

iHub will be migrated into NECTR once it (NECTR) is operational. The NECTR tool will be rolled out with different user groups over the course of a series of phases that will run from the fall of 2022-23 to the end of the fiscal year. The system should be available to all departmental users by April 1, 2023.

## Permissions and data quality

As with scope, permissions will be largely left up to the discretion of branches and area offices. Depending on the roles of various individuals and work units, branches and area offices can request, and be granted, varying levels of permissions. The levels of permission are as follows:

1. Read access. This allows the individual to see interactions, committees/working groups, organizations, and contacts in the tool.
2. Author access. In addition to all functionalities associated with read access, author access allows the user to create, edit, and delete interactions, committees/working groups, organizations, and contacts.
3. Administration access. Administrators have all of the abilities of app authors, but can also manage certain lists and functions in the tool (e.g. add topics of discussion, change the access levels of other users, etc.).

It is expected that each branch or area office would have a small number of app administrators. These users would be able to add more users from their branch or area office, as needed. Author access could be given to all staff who conduct or plan engagement, or who develop briefing products relating to information (for example, scenario notes or ministerial correspondence). Finally, read access could be given to anyone who could benefit from being able to access this information.

There will not be consistent call-outs for data validation. It will be expected that by making the tool broadly accessible to those who conduct engagement work, updates can be made as needed. For example, if a stakeholder or partner changes roles or moves to a different organization, DFO staff can make that change when they learn of it. It would be best practice to first look at that contact's information page to see who else in the Region interacts with them, then reach out and notify those

colleagues of the change. The change could also be noted in “notes” or “comments” section of a given contact, organization, committee/working group, or interaction.

A confirmation page will come up whenever a user tries to delete an interaction, committee/working group, organization, or contact, to make sure that the user did not click “Delete” by accident. If a user tries to delete a committee or working group, contact, or organization, the confirmation page will indicate all linkages (i.e. all related interactions, committees, contacts, organizations) associated with that committee/working, contact, or organization, and it cannot be deleted until those linkages are severed (e.g. until a contact is removed from a committee’s membership list).

## Technical support

If users encounter any technical difficulties while using MarET, they are encouraged to submit a ticket by clicking the “Feedback / Bugs” icon at the top right of the window. This ticket will be directed to ODIS staff for action/consideration. PRD will also be monitoring tickets to identify any potential considerations from a workflow or business needs perspective.

A video tutorial and an FAQ will be developed shortly.

Help text is included throughout MarET to provide context and guidance to users. You can see help text by hovering your mouse over the  icons.