



City Council - Agenda

Date: February 22, 2022
Time: 9:30 a.m. - 5:00 p.m.
Location: Council Chamber, 2nd floor, City Hall

Call to Order: 9:30 a.m.
Lunch: Noon - 1:30 p.m.
Recess: 3:30 p.m. - 3:45 p.m.
Adjournment: 5 p.m.

Continuation: Thursday, February 24, 2022
Call to Order: 9:30 a.m.
Lunch: Noon - 1:30 p.m.
Recess: 3:30 p.m. - 3:45 p.m.
Adjournment: 5 p.m.

Deputy Mayor: A. Salvador
Acting Mayor: E. Rutherford

Please note: City Hall is open to the public at reduced capacity for this meeting. Members of the public may choose to participate at Council and Committee meetings in person or remotely. Those participating in person are required to wear face coverings at all times while in City Hall, including while speaking (per Temporary Mandatory Face Coverings Bylaw 19408). You can [request to speak](#) up until your item has been dealt with. The public is invited to view in-progress meetings online via the Agenda, [Council on the Web](#) or City Council's [YouTube Channel](#).

For additional information, contact the Office of the City Clerk at (780) 496-8178.

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10.	Notices of Motion and Motions without Customary Notice	
11.	Adjournment	



City Council Minutes

February 7, 2022

9:30 a.m.

Council Chamber, 2nd floor, City Hall

Present: A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, J. Wright

1. Call to Order and Related Business

1.1 Call to Order and Land Acknowledgement

Deputy Mayor A. Salvador called the meeting to order at 9:30 a.m., Monday, February 7, 2022, and acknowledged that City Council meets on the traditional land of Treaty 6 Territory. The Chair also acknowledged the diverse Indigenous peoples whose ancestors' footsteps have marked this territory for centuries such as: Cree, Dene, Saulteaux, Blackfoot, Nakota Sioux, as well as Metis and Inuit, and now settlers from around the world.

1.2 Roll Call

Deputy Mayor A. Salvador conducted roll call and confirmed the attendance of Members of City Council.

Mayor A. Sohi; and Councillors M. Janz and T. Cartmell were absent with notice for a portion of the meeting.

A. Corbould, City Manager; and A. Giesbrecht, City Clerk, R. Yusuf and E. Norton, Office of the City Clerk, were also in attendance.

1.3 Adoption of Agenda

Moved by: S. Hamilton

Seconded by: K. Principe

That the February 7/9, 2022, City Council meeting agenda be adopted with the following changes:

Addition:

- 6.9 COVID-19 Update - Verbal report

Deletions:

- 6.3 LRT Safety
- 7.6 Bylaw 19983 - Amending the Conduct of Transit Passengers Bylaw 8353 Amendment #4

Requests to postpone:

- 6.1 Office of the Integrity Commissioner Annual Report (September 2020 - December 2021)

Due Date: February 22/24, 2022, City Council

- 6.4 Direct Control (DC1) Zoning - Glenora Heritage Character Area

Due Date: February 22/24, 2022, City Council

- 6.6 Alcohol Consumption in River Valley Parks - Pilot Project Results

Due Date: February 22/24, 2022, City Council

In Favour (12): T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (12 to 0)

Moved by: M. Janz

Seconded by: E. Rutherford

That the Orders of the Day for the February 9, 2022, City Council continuation meeting be extended to adjourn upon completion of the agenda.

In Favour (11): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Opposed (2): K. Principe, and J. Rice

Carried (11 to 2)

1.4 Approval of Minutes

Moved by: A. Knack

Seconded by: S. Hamilton

That the minutes from the following meetings be approved:

- January 24/26, 2022, City Council
- January 25, 2022, City Council Public Hearing
- January 25, 2022, City Council Non-Regular

In Favour (12): T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (12 to 0)

1.5 Protocol Items

1. Michael Strembitsky School (A. Salvador)

Deputy Mayor A. Salvador, on behalf of City Council, welcomed the Grade 6 class from Michael Strembitsky School in Ward Karhiio and their teacher T. Boyko.

2. McLeod School (A. Salvador)

Deputy Mayor A. Salvador, on behalf of City Council, welcomed the Grade 6 class from McLeod School in Ward Dene and their teacher S. Morgan.

3. National Black Coalition of Canada (K. Tang)

Councillor K. Tang, on behalf of City Council, recognized February as Black History Month.

2. Items for Discussion and Related Business

2.1 Select Items for Debate

The following items were selected for debate: 6.2, 6.5, 6.7, 6.8. 6.9, 7.4, 7.7, 7.8, 7.9, 9.1, 9.2 and 9.3.

2.2 Vote on Reports not Selected for Debate

All items were selected for debate.

2.3 Requests to Speak

Requests to Speak were not considered.

2.4 Requests for Specific Time on Agenda

Moved by: A. Stevenson

Seconded by: A. Knack

That the following items be dealt with at a specific time on the agenda:

- 6.2 Efficiencies in Municipal Service Delivery - Fourth item of business, Monday, February 7, 2022
- 6.7 Rapid Housing Initiative Hotel Conversion - Coliseum Inn - First item at 11 a.m., Monday, February 7, 2022
- 6.9 COVID-19 Update - Verbal report - First item of business, Wednesday, February 9, 2022
- 9.2 Valley Line Southeast Contractual Update - Verbal report - Second item at 11 a.m., Monday, February 7, 2022

In Favour (12): T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (12 to 0)

2.5 Vote on Bylaws not Selected for Debate

Moved by: T. Cartmell

Seconded by: A. Knack

That the following Bylaws be read a first time:

- 7.1 Bylaw 19978 - A Bylaw to amend Bylaw 18008, as amended by Bylaw 18481, to authorize the City of Edmonton to undertake, construct and finance Integrated Infrastructure Services Project - Lewis Farms Community Recreation Centre and Library
- 7.2 Bylaw 19979 (Ambleside Integrated Site - Phase 1) - A Bylaw to authorize the City of Edmonton to undertake, construct and finance Integrated Infrastructure Services Project, Ambleside Integrated Site -

Phase I

- 7.3 Bylaw 19980 - A Bylaw to authorize the City of Edmonton to undertake, construct and finance Integrated Infrastructure Services Project, Valley Zoo - Nature's Wild Backyard Phase II
- 7.5 Bylaw 19982 (50 Street CPR Grade Separation) A Bylaw to amend Bylaw 18472, to authorize the City of Edmonton to undertake, construct and finance Integrated Infrastructure Services Project, 50 Street CPR Grade Separation

In Favour (12): T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (12 to 0)

3. Councillor Inquiries

3.1 Legalization of Cannabis - Engagement, Classes and Regulations (J. Rice)

Can Administration provide a memo that outlines a brief summary of:

- the land use work and engagement completed as a result of the legalization of cannabis; and
- the development of the use classes and regulations, including separation distances for all uses including daycares.

3.2 Licenses for Rental Providers and Public Access to Information (M. Janz)

Can Administration provide an information report that outlines measures to:

- Establishing licenses for all rentals including but not limited to basement suites, garage suites, short term rentals (Air BnB) etc; and
- increasing property tenants' access to such information, and that the report include information about the potential costs and implications on such measures.

Due Date: April 25, 2022, Community and Public Services Committee

3.3 Fines and Penalties for Excess Vehicle Noise (M. Janz)

Can Administration provide an information report with options including but not limited to increase fines, penalties, and enforcement capacity for passenger vehicles creating excessive noise.

Due Date: June 27, 2022, Community and Public Services Committee

3.4 Controlled Drug and Substances Act Section 56(1) Exemption Process (M. Janz)

Can Administration provide an information report on what would be required to pursue a section 56(1) exemption to the *Controlled Drugs and Substances Act* and include information as to how the City of Toronto has initiated this process as well as the anticipated benefits of this approach.

Due Date: March 21, 2022, Community and Public Services Committee

4. Reports to be Dealt with at a Different Meeting

There were no Reports to be Dealt with at a Different Meeting.

5. Requests to Reschedule Reports

There were no Requests to Reschedule Reports.

6. Public Reports

6.1 Office of the Integrity Commissioner Annual Report (September 2020 - December 2021)

This item was postponed to the February 22/24, 2022, City Council meeting (see item 1.3).

6.2 Efficiencies in Municipal Service Delivery

The following members of Administration's delegation answered questions:

- A. Corbould, City Manager
- S. Padbury, Chief Financial Officer and Deputy City Manager, Financial and Corporate Services
- K. Matheson, Financial and Corporate Services

Moved by: J. Rice
Seconded by: A. Knack

That Administration return to City Council with options to reduce the expenditure budget by \$10,000,000 with a focus on efficiencies in municipal service delivery.

Amendment:

Moved by: A. Knack
Seconded by: S. Hamilton

That “by \$10,000,000” be deleted.

In Favour (5): T. Cartmell, S. Hamilton, A. Knack, K. Principe, and J. Rice

Opposed (8): A. Sohi, M. Janz, A. Paquette, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Defeated (5 to 8)

Motion, put:

Moved by: J. Rice
Seconded by: A. Knack

That Administration return to City Council with options to reduce the expenditure budget by \$10,000,000 with a focus on efficiencies in municipal service delivery.

In Favour (4): S. Hamilton, A. Knack, K. Principe, and J. Rice

Opposed (9): A. Sohi, T. Cartmell, M. Janz, A. Paquette, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Defeated (4 to 9)

6.3 LRT Safety

This item was deleted from the agenda (see item 1.3).

6.4 Direct Control (DC1) Zoning - Glenora Heritage Character Area

This item was postponed to the February 22/24, 2022, City Council meeting (see item 1.3).

6.5 Goods and Services Procurement Policy

The following members of Administration's delegation answered questions:

- S. Padbury, Chief Financial Officer and Deputy City Manager, Financial and Corporate Services
- T. Barga, Financial and Corporate Services

Moved by: S. Hamilton

Seconded by: A. Knack

Goods and Services Procurement Policy

That Administration return to Committee with a report outlining the City's current Goods and Services Procurement policies and practices and those of comparable municipalities and public sector entities including the use of standing agreements within the formal procurement process and the transparency relating to these standing arrangements such as when competitions open and close, the length of contracts and how vendors are notified.

Due Date: May 18, 2022, Executive Committee

In Favour (12): T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (12 to 0)

6.6 Alcohol Consumption in River Valley Parks - Pilot Project Results

This item was postponed to the February 22/24, 2022, City Council meeting (see item 1.3).

6.7 Rapid Housing Initiative Hotel Conversion - Coliseum Inn

Moved by: A. Sohi

Seconded by: A. Stevenson

1. That the 2022 revenue and expenditure operating budget for the Social Development branch be increased by \$10,980,828, to recognize anticipated receipt of Rapid Housing Initiative funding from the Canada Mortgage and Housing Corporation Rapid Housing Initiative Project Stream (revenue), as well as operating contributions (expenditure) to an external organization for the purpose of funding the project

described in Attachment 1 of the February 2, 2022, Community Services report CS00898.

2. That the 2022 revenue and expenditure operating budget for the Social Development branch be increased by \$7,320,552 with funding from the Affordable Housing Reserve for the City contribution towards the project described in Attachment 1 of the February 2, 2022, Community Services report CS00898.
3. That a subsidy funding affordable housing agreement between the City of Edmonton and Homeward Trust Holding Company, not to exceed \$18,301,380, as outlined in Attachment 1 of the February 2, 2022, Community Services report CS00898, be approved, and that the agreement be in form and content acceptable to the City Manager.
4. That Attachment 2 of the February 2, 2022, Community Services report CS00898 remain private pursuant to sections 21 (disclosure harmful to intergovernmental relations), 24 (advice from officials) and 27 (privileged information) of the *Freedom of Information and Protection of Privacy Act*.

In Favour (11): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Opposed (2): K. Principe, and J. Rice

Carried (11 to 2)

6.8 Sale of Greenfield Residential/Enterprise Land Development History

The following members of Administration's delegation answered questions:

- C. Hodgson, Financial and Corporate Services
- S. Padbury, Chief Financial Officer and Deputy City Manager, Financial and Corporate Services
- A. Corbould, City Manager

Moved by: M. Janz

Seconded by: J. Wright

1. That Administration reinstate the greenfield residential/mixed-use land development program, as appropriate, in the Aster, Goodridge Corners

and Schonsee neighbourhoods, in accordance with Land Development Policy C511.

2. That all remaining funds held in Capital Profile CM-16-2020, Residential/Mixed Use Land Development (\$33.04 million), be released.
3. That Attachments 6 and 9 of the December 6, 2021, Financial and Corporate Services report FCS00844 remain private pursuant to sections 24 (advice from officials) and 25 (disclosure harmful to economic and other interests of a public body) of the *Freedom of Information and Protection of Privacy Act*.

Amendment:

Moved by: A. Stevenson

Seconded by: T. Cartmell

That a part 4 be added as follows:

4. That Administration return to the November 30, 2022, Executive Committee meeting with a recommended update to Land Development Policy C511 to bring it into alignment with goals outlined in The City Plan, ConnectEdmonton, The Community Energy Transition Strategy and other strategies as required.

In Favour (7): A. Sohi, M. Janz, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Opposed (6): T. Cartmell, S. Hamilton, A. Knack, A. Paquette, K. Principe, and J. Rice

Carried (7 to 6)

Motion as Amended, put:

Moved by: M. Janz

Seconded by: J. Wright

1. That Administration reinstate the greenfield residential/mixed-use land development program, as appropriate, in the Aster, Goodridge Corners and Schonsee neighbourhoods, in accordance with Land Development Policy C511.

2. That all remaining funds held in Capital Profile CM-16-2020, Residential/Mixed Use Land Development (\$33.04 million), be released.

3. That Attachments 6 and 9 of the December 6, 2021, Financial and Corporate Services report FCS00844 remain private pursuant to sections 24 (advice from officials) and 25 (disclosure harmful to economic and other interests of a public body) of the *Freedom of Information and Protection of Privacy Act*.

Land Development Policy C511 - Recommended Updates

4. That Administration return to the November 30, 2022, Executive Committee with a recommended update to Land Development Policy C511 to bring it into alignment with goals outlined in The City Plan, ConnectEdmonton, The Community Energy Transition Strategy and other strategies as required.

Due Date: November 30, 2022, Executive Committee

In Favour (7): A. Sohi, M. Janz, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Opposed (6): T. Cartmell, S. Hamilton, A. Knack, A. Paquette, K. Principe, and J. Rice

Carried (7 to 6)

6.9 COVID-19 Update - Verbal report

The following members of Administration's delegation made a presentation and answered questions:

- A. Corbould, City Manager
- C. Sikora, Alberta Health Services

The following members of Administration's delegation answered questions:

- M. Plouffe, City Solicitor
- N. Poirier, Community Services
- R. Jevne, Acting Deputy City Manager, Community Services
- C. Taylor, Employee Services
- C. Owen, Deputy City Manager, Communications and Engagement

Moved by: A. Paquette

Seconded by: M. Janz

1. That Administration return to Council with options for and detailing the implications of implementing a municipal Restriction Exemption Program (REP) including options for both City owned and operated facilities and citywide private businesses.
2. That the Mayor, on behalf of Council, formally request that the provincial government provide the City of Edmonton with the recommendations made by the Chief Medical Officer of Health and the data used to inform the recommendations announced February 8, 2022.

Amendment:

Moved by: T. Cartmell

Seconded by: E. Rutherford

That the words "and/or an active screening program" be added after "Restriction Exemption Program (REP)".

In Favour (11): A. Sohi, T. Cartmell, S. Hamilton, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Stevenson, K. Tang, and J. Wright

Opposed (2): M. Janz, and A. Salvador

Carried (11 to 2)

Members of City Council requested that the motion be split for voting purposes.

Part 1 of Motion, as amended, put:

Moved by: A. Paquette

Seconded by: M. Janz

Municipal Restriction Exemption Program - Options and Implications

1. That Administration return to Council with options for and detailing the implications of implementing a municipal Restriction Exemption Program (REP) and/or an active screening program including options for both City owned and operated facilities and citywide private businesses.

Due Date: To be determined

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (13 to 0)

Part 2 of Motion, put:

Moved by: A. Paquette

Seconded by: M. Janz

2. That the Mayor, on behalf of Council, write a letter requesting that the provincial government provide the City of Edmonton with the recommendations made by the Chief Medical Officer of Health and the data used to inform the recommendations announced February 8, 2022.

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (13 to 0)

7. Bylaws

- 7.1 Bylaw 19978 - A Bylaw to amend Bylaw 18008, as amended by Bylaw 18481, to authorize the City of Edmonton to undertake, construct and finance Integrated Infrastructure Services Project - Lewis Farms Community Recreation Centre and Library**

This item was not selected for debate and was dealt with as part of item 2.5. Bylaw 19978 received first reading.

- 7.2 Bylaw 19979 (Ambleside Integrated Site - Phase 1) - A Bylaw to authorize the City of Edmonton to undertake, construct and finance Integrated Infrastructure Services Project, Ambleside Integrated Site - Phase I**

This item was not selected for debate and was dealt with as part of item 2.5. Bylaw 19979 received first reading.

7.3 Bylaw 19980 - A Bylaw to authorize the City of Edmonton to undertake, construct and finance Integrated Infrastructure Services Project, Valley Zoo - Nature's Wild Backyard Phase II

This item was not selected for debate and was dealt with as part of item 2.5. Bylaw 19980 received first reading.

7.4 Bylaw 19981 (Fire Station 8 Relocation - Blatchford) to authorize the City of Edmonton to undertake, construct and finance Integrated Infrastructure Services Project, Fire Station #8 Relocation - Blatchford

Moved by: T. Cartmell

Seconded by: A. Stevenson

That Bylaw 19981 be read a first time.

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (13 to 0)

7.5 Bylaw 19982 (50 Street CPR Grade Separation) A Bylaw to amend Bylaw 18472, to authorize the City of Edmonton to undertake, construct and finance Integrated Infrastructure Services Project, 50 Street CPR Grade Separation

This item was not selected for debate and was dealt with as part of item 2.5. Bylaw 19982 received first reading.

7.6 Bylaw 19983 - Amending the Conduct of Transit Passengers Bylaw 8353 Amendment #4

This item was deleted from the agenda (see item 1.3).

7.7 Charter Bylaw 19929 - To rezone land in the Silver Berry neighbourhood

Moved by: T. Cartmell

Seconded by: K. Tang

That Charter Bylaw 19929 be read a third time.

In Favour (11): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Opposed (2): K. Principe, and J. Rice

Carried (11 to 2)

7.8 Bylaw 19900 - Amendment to the Chappelle Neighbourhood Area Structure Plan

Items 7.8 and 7.9 were dealt with together (see item 7.8).

Moved by: T. Cartmell

Seconded by: K. Tang

That Bylaw 19900 and Charter Bylaw 19901 be read a third time.

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (13 to 0)

7.9 Charter Bylaw 19901 - To allow for low intensity commercial uses, Chappelle

Items 7.8 and 7.9 were dealt with together (see item 7.8).

8. Motions Pending

8.1 Licenses for Rental Providers and Public Access to Information (M. Janz)

Councillor M. Janz stated that he would not be making the motion for which he had given notice at the January 17, 2022, Community and Public Services Committee meeting.

8.2 Fines and Penalties for Excess Vehicle Noise (M. Janz)

Councillor M. Janz stated that he would not be making the motion for which he had given notice at the January 17, 2022, Community and Public Services Committee meeting.

8.3 Controlled Drug and Substances Act Section 56(1) Exemption Process (M. Janz)

Councillor M. Janz stated that he would not be making the motion for which he had given notice at the January 17, 2022, Community and Public Services Committee meeting.

9. Private Reports

Moved by: A. Stevenson

Seconded by: K. Tang

That City Council meet in private pursuant to sections 21 (disclosure harmful to intergovernmental relations), 24 (advice from officials), 25 (disclosure harmful to economic and other interests of a public body) and 27 (privileged information) of the *Freedom of Information and Protection of Privacy Act* for the discussion of items 9.1 and 9.2.

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (13 to 0)

City Council met in private at 11:25 a.m., Monday, February 7, 2022.

Moved by: A. Salvador

Seconded by: E. Rutherford

That City Council meet in public.

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (13 to 0)

City Council met in public at 4:59 p.m., Monday, February 7, 2022.

9.1 Council discussion on Council Priorities and Budget Strategies

The following member of Administration's delegation made a presentation:

- F. Mutheardy, Financial and Corporate Services

The following member of the delegation made a presentation and answered questions:

- Z. Somani, Pirani Group

The following members of Administration's delegation made a presentation and answered questions:

- A. Corbould, City Manager
- C. Owen, Deputy City Manager, Communications and Engagement

Moved by: J. Rice

Seconded by: A. Salvador

1. That the February 7, 2022, Communications and Engagement report, CE00951, be received for information.
2. That the February 7, 2022, Communications and Engagement report CE00951, remain private pursuant to sections 21 (disclosure harmful to intergovernmental relations), 24 (advice from officials) and 25 (disclosure harmful to the economic or other interests of a public body) of the *Freedom of Information and Protection of Privacy Act*.

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (13 to 0)

9.2 Valley Line Southeast Contractual Update - Verbal report

The following members of Administration's delegation made a presentation and answered questions:

- A. Laughlin, Deputy City Manager, Integrated Infrastructure Services
- B. Ferguson, Integrated Infrastructure Services

The following members of Administration's delegation answered questions:

- L. Semenchuk, Office of the City Manager (Legal Services)
- A. Corbould, City Manager

Moved by: J. Rice

Seconded by: A. Salvador

1. That the February 7, 2022, Integrated Infrastructure Services verbal report IIS01025, be received for information.
2. That the February 7, 2022, Integrated Infrastructure Services verbal report IIS01025 remain private pursuant to sections 24 (advice from

officials), 25 (disclosure harmful to economic and other interests of a public body) and 27 (privileged information) of the *Freedom of Information and Protection of Privacy Act*.

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (13 to 0)

9.3 Edmonton Police Commission - Candidate Interviews

Moved by: S. Hamilton

Seconded by: K. Tang

That City Council meet in private pursuant to sections 17 (disclosure harmful to personal privacy) and 24 (advice from officials) of the *Freedom of Information and Protection of Privacy Act* for the discussion of item 9.3.

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (13 to 0)

City Council met in private at 1:50 p.m., Wednesday, February 9, 2022.

The following made a presentation and answered questions:

- A. Giesbrecht, City Clerk

The following member of the delegation made a presentation and answered questions:

- J. Mitchell, Employee Services

Moved by: J. Rice

Seconded by: A. Paquette

That City Council meet in public.

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (13 to 0)

City Council met in public at 2:24 p.m., Wednesday, February 9, 2022.

Moved by: E. Rutherford

Seconded by: J. Wright

Edmonton Police Commission Bylaw 14040 - Amendments

1. That Administration return to the March 14, 2022, City Council meeting, with amendments to the *Edmonton Police Commission Bylaw 14040* for the purpose of increasing the number of appointments to include one additional public member.

Due Date: March 14, 2022, City Council

2. That Attachment 17 be added to the December 13, 2021, Office of the City Clerk report OCC0832 and that the actions as outlined in Attachment 17 be approved and remain private pursuant to section 29 (information that will be made available to the public within 60 days) of the *Freedom of Information and Protection of Privacy Act*.

3. That the revised December 13, 2021, Office of the City Clerk report OCC0832 and Attachments 2-16 remain private pursuant to sections 17 (disclosure harmful to personal privacy) and 24 (advice from officials) of the *Freedom of Information and Protection of Privacy Act*.

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (13 to 0)

10. Notices of Motion and Motions without Customary Notice

10.1 2022 Council Calendar Adjustments - Orders of the Day for the February 22/24, 2022, City Council meeting (T. Cartmell)

Councillor T. Cartmell requested permission to make a motion without notice regarding adjustments to the 2022 Council Calendar.

Moved by: A. Stevenson
Seconded by: A. Paquette

That City Council waive the rules on providing notice of motion as set out in section 32 of Bylaw 18155 - Council Procedures Bylaw to allow Councillor T. Cartmell to make a motion without notice regarding adjustments to the 2022 Council Calendar.

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (13 to 0)

Moved by: T. Cartmell
Seconded by: A. Salvador

That the Orders of the Day for the February 22/24, 2022, City Council meeting be changed as follows:

February 24, 2022, City Council continuation:

- Lunch - Noon to 1:30 p.m.
- Recess - 3:30 p.m. to 3:45 p.m.
- Adjournment - 5 p.m.

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (13 to 0)

11. Adjournment

The meeting adjourned at 2:28 p.m., Wednesday, February 9, 2022.

Chair

City Clerk



City Council Public Hearing Minutes

February 8, 2022

1:30 p.m.

Council Chamber, 2nd floor, City Hall

Present: A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, J. Wright

1. Call to Order and Related Business

1.1 Call to Order and Land Acknowledgement

Mayor A. Sohi called the meeting to order at 1:30 p.m., Tuesday, February 8, 2022, and acknowledged that City Council meets on the traditional land of Treaty 6 Territory. The Chair also acknowledged the diverse Indigenous peoples whose ancestors' footsteps have marked this territory for centuries such as: Cree, Dene, Saulteaux, Blackfoot, Nakota Sioux, as well as Metis and Inuit, and now settlers from around the world.

1.2 Roll Call

Mayor A. Sohi conducted roll call and confirmed the attendance of Members of City Council.

Mayor A. Sohi was absent with notice for a portion of the meeting.

C. Schlamp, T. Orbell and M. de Guzman, Office of the City Clerk, were also in attendance.

1.3 Adoption of Agenda

Moved by: S. Hamilton

Seconded by: A. Paquette

That the February 8, 2022, City Council Public Hearing agenda be adopted with the following change:

Addition:

- 3.11 Charter Bylaw 19935 - To allow for medium rise Multi-Unit Housing, Westmount

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (13 to 0)

1.4 Protocol Items

There were no Protocol Items.

2. Explanation of Public Hearing Process

2.1 Call for Persons to Speak

Mayor A. Sohi explained the public hearing process. C. Schlamp, Office of the City Clerk, asked whether there were any persons present to speak to the following bylaws, in panels:

Charter Bylaw 19946

The following speakers registered in favour:

1. E. Shillington, Stantec (to answer questions only)
2. T. Lumsden, City of Edmonton (to answer questions only)

Charter Bylaw 19939

The following speakers registered in favour:

1. M. Vivian, Stantec (to answer questions only)
2. P. Tsoukalas, Brookfield Residential (to answer questions only)

Charter Bylaw 19947

There were no speakers registered to the passing of Charter Bylaw 19947.

Charter Bylaw 19943

The following speakers registered in favour:

1. B. Dibben, Select Engineering (to answer questions only)
2. A. Petrosky, Melcor Developments (to answer questions only)
3. S. Keating, Melcor Developments (to answer questions only)

Charter Bylaw 19940

The following speaker registered in favour:

1. B. Loree (to answer questions only)

Charter Bylaw 19945

The following speaker registered in favour:

1. G. Hordyk, L7 Architecture (to answer questions only)

Charter Bylaw 19944

There were no speakers registered to the passing of Charter Bylaw 19944.

Charter Bylaw 19942

The following speaker registered in favour:

1. M. Figueira, Green Space Alliance (to answer questions only)

Charter Bylaw 19934

The following speakers registered in favour:

1. Y. Lew, Stantec
2. J. Wacko, Cantiro (to answer questions only)
3. E. Shillington, Stantec (to answer questions only)
4. P. Fereday, Cantiro (to answer questions only)
5. C. Oberg, Bunt Engineering (to answer questions only)
6. C. Fedyna, Gravity Architecture (to answer questions only)

The following speakers registered in opposition:

1. E. Jones
2. S. Pratt
3. S. Post

4. F. Calder
5. N. Phillet
6. M. Reeves
7. D. Cannam
8. H. Bessey
9. A. Al-Kheder
10. A. Persi
11. V. Vilimanovich

Charter Bylaw 19930

The following speaker registered in favour:

1. T. Mahey

The following speakers registered in opposition:

1. C. Kypridemou
2. L. Mah
3. D. Kuchelyma, Jasper Park Community League
4. R. Graham, on behalf of 185 Jasper Park residents
5. C. Eigenseher
6. B. Harris
7. A. Eigenseher-Harris
8. B. Kwasnitza, Jasper Park Community League

Charter Bylaw 19935

The following speakers registered in opposition:

1. D. Groome
2. K. Elhatton-Lake
3. T. Genge
4. K. Sherlock

3. Bylaws and Related Reports

Moved by: T. Cartmell

Seconded by: K. Tang

That the Public Hearing on the following Bylaws be closed:

- 3.1 Charter Bylaw 19946 - Text amendment to the Zoning Bylaw - Section 997 Special Area Blatchford Appendix II Environmental Overlay
- 3.2 Charter Bylaw 19939 - To rezone land in the Chappelle neighbourhood
- 3.3 Charter Bylaw 19947 - To allow for single detached housing, Rosenthal
- 3.4 Charter Bylaw 19943 - To rezone land in the Mattson neighbourhood
- 3.5 Charter Bylaw 19940 - To allow for industrial businesses that are compatible with nearby residential uses, Ritchie
- 3.6 Charter Bylaw 19945 - To rezone land in the Calgary Trail North neighbourhood
- 3.7 Charter Bylaw 19944 - To allow for small scale infill development, Sherwood
- 3.8 Charter Bylaw 19942 - To allow for low rise Multi-unit Housing, King Edward Park

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (13 to 0)

Moved by: T. Cartmell

Seconded by: K. Tang

That the following Bylaws be read a first time:

- 3.1 Charter Bylaw 19946 - Text amendment to the Zoning Bylaw - Section 997 Special Area Blatchford Appendix II Environmental Overlay
- 3.2 Charter Bylaw 19939 - To rezone land in the Chappelle neighbourhood
- 3.3 Charter Bylaw 19947 - To allow for single detached housing, Rosenthal
- 3.4 Charter Bylaw 19943 - To rezone land in the Mattson neighbourhood
- 3.5 Charter Bylaw 19940 - To allow for industrial businesses that are compatible with nearby residential uses, Ritchie

- 3.6 Charter Bylaw 19945 - To rezone land in the Calgary Trail North neighbourhood
- 3.7 Charter Bylaw 19944 - To allow for small scale infill development, Sherwood
- 3.8 Charter Bylaw 19942 - To allow for low rise Multi-unit Housing, King Edward Park

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (13 to 0)

Moved by: T. Cartmell

Seconded by: K. Tang

That the following Bylaws be read a second time:

- 3.1 Charter Bylaw 19946 - Text amendment to the Zoning Bylaw - Section 997 Special Area Blatchford Appendix II Environmental Overlay
- 3.2 Charter Bylaw 19939 - To rezone land in the Chappelle neighbourhood
- 3.3 Charter Bylaw 19947 - To allow for single detached housing, Rosenthal
- 3.4 Charter Bylaw 19943 - To rezone land in the Mattson neighbourhood
- 3.5 Charter Bylaw 19940 - To allow for industrial businesses that are compatible with nearby residential uses, Ritchie
- 3.6 Charter Bylaw 19945 - To rezone land in the Calgary Trail North neighbourhood
- 3.7 Charter Bylaw 19944 - To allow for small scale infill development, Sherwood
- 3.8 Charter Bylaw 19942 - To allow for low rise Multi-unit Housing, King Edward Park

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (13 to 0)

Moved by: T. Cartmell

Seconded by: K. Tang

That the following Bylaws be considered for third reading:

- 3.1 Charter Bylaw 19946 - Text amendment to the Zoning Bylaw - Section 997 Special Area Blatchford Appendix II Environmental Overlay
- 3.2 Charter Bylaw 19939 - To rezone land in the Chappelle neighbourhood
- 3.3 Charter Bylaw 19947 - To allow for single detached housing, Rosenthal
- 3.4 Charter Bylaw 19943 - To rezone land in the Mattson neighbourhood
- 3.5 Charter Bylaw 19940 - To allow for industrial businesses that are compatible with nearby residential uses, Ritchie
- 3.6 Charter Bylaw 19945 - To rezone land in the Calgary Trail North neighbourhood
- 3.7 Charter Bylaw 19944 - To allow for small scale infill development, Sherwood
- 3.8 Charter Bylaw 19942 - To allow for low rise Multi-unit Housing, King Edward Park

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (13 to 0)

Moved by: T. Cartmell

Seconded by: K. Tang

That the following Bylaws be read a third time:

- 3.1 Charter Bylaw 19946 - Text amendment to the Zoning Bylaw - Section 997 Special Area Blatchford Appendix II Environmental Overlay
- 3.2 Charter Bylaw 19939 - To rezone land in the Chappelle neighbourhood
- 3.3 Charter Bylaw 19947 - To allow for single detached housing, Rosenthal
- 3.4 Charter Bylaw 19943 - To rezone land in the Mattson neighbourhood
- 3.5 Charter Bylaw 19940 - To allow for industrial businesses that are compatible with nearby residential uses, Ritchie

- 3.6 Charter Bylaw 19945 - To rezone land in the Calgary Trail North neighbourhood
- 3.7 Charter Bylaw 19944 - To allow for small scale infill development, Sherwood
- 3.8 Charter Bylaw 19942 - To allow for low rise Multi-unit Housing, King Edward Park

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (13 to 0)

3.1 Charter Bylaw 19946 - Text amendment to the Zoning Bylaw - Section 997 Special Area Blatchford Appendix II Environmental Overlay

This item was not selected for debate and was dealt with as part of item 3. Charter Bylaw 19946 received three readings.

3.2 Charter Bylaw 19939 - To rezone land in the Chappelle neighbourhood

This item was not selected for debate and was dealt with as part of item 3. Charter Bylaw 19939 received three readings.

3.3 Charter Bylaw 19947 - To allow for single detached housing, Rosenthal

This item was not selected for debate and was dealt with as part of item 3. Charter Bylaw 19947 received three readings.

3.4 Charter Bylaw 19943 - To rezone land in the Mattson neighbourhood

This item was not selected for debate and was dealt with as part of item 3. Charter Bylaw 19943 received three readings.

3.5 Charter Bylaw 19940 - To allow for industrial businesses that are compatible with nearby residential uses, Ritchie

This item was not selected for debate and was dealt with as part of item 3. Charter Bylaw 19940 received three readings.

3.6 Charter Bylaw 19945 - To rezone land in the Calgary Trail North neighbourhood

This item was not selected for debate and was dealt with as part of item 3. Charter Bylaw 19945 received three readings.

3.7 Charter Bylaw 19944 - To allow for small scale infill development, Sherwood

This item was not selected for debate and was dealt with as part of item 3. Charter Bylaw 19944 received three readings.

3.8 Charter Bylaw 19942 - To allow for low rise Multi-unit Housing, King Edward Park

This item was not selected for debate and was dealt with as part of item 3. Charter Bylaw 19942 received three readings.

3.9 Charter Bylaw 19934 - To allow for eleven multi-unit dwellings in the form of row housing, Westmount

The following member of Administration's delegation made a presentation:

- C. St. Aubin, Urban Planning and Economy

The following speaker made a presentation in favour:

- Y. Lew, Stantec

The following speakers made presentations in opposition:

- E. Jones
- S. Pratt
- S. Post
- M. Reeves
- D. Cannam
- H. Bessey
- V. Vilimanovich

The following speakers made presentations and answered questions in opposition:

- F. Calder
- N. Phillet
- A. Al-Kheder

The following members of Administration's delegation answered questions:

- C. St. Aubin, Urban Planning and Economy
- J. Inkpen, Office of the City Manager (Legal Services)
- F. Saeed, Urban Planning and Economy
- S. McCabe, Deputy City Manager, Urban Planning and Economy
- T. Pawlyk, Urban Planning and Economy

Mayor A. Sohi asked if Council Members have any clarifying questions of anyone registered to speak.

The following speaker answered questions:

- Y. Lew, Stantec

Mayor A. Sohi asked if Council Members have any clarifying questions of anyone registered to speak. There was no one.

Moved by: A. Stevenson

Seconded by: A. Salvador

That the Public Hearing on Charter Bylaw 19934 be closed.

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (13 to 0)

Moved by: A. Stevenson

Seconded by: A. Salvador

That Charter Bylaw 19934 be read a first time.

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (13 to 0)

Moved by: A. Stevenson

Seconded by: A. Salvador

That Charter Bylaw 19934 be read a second time.

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (13 to 0)

Moved by: A. Stevenson

Seconded by: A. Salvador

That Charter Bylaw 19934 be considered for third reading.

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (13 to 0)

Moved by: A. Stevenson

Seconded by: A. Salvador

That Charter Bylaw 19934 be read a third time.

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (13 to 0)

3.10 Charter Bylaw 19930 - To allow for low rise Multi-unit Housing development, Jasper Park

The following member of Administration's delegation made a presentation:

- C. St. Aubin, Urban Planning and Economy

The following speaker made a presentation and answered questions in favour:

- T. Mahey

The following speakers made presentations in opposition:

- L. Mah

- D. Kuchelyma, Jasper Park Community League

The following speakers made presentations and answered questions in opposition:

- R. Graham, on behalf of 185 Jasper Park residents
- C. Eigenseher
- B. Harris
- A. Eigenseher-Harris
- B. Kwasnitza, Jasper Park Community League

The following members of Administration's delegation answered questions:

- C. St. Aubin, Urban Planning and Economy
- T. Pawlyk, Urban Planning and Economy
- S. McCabe, Deputy City Manager, Urban Planning and Economy
- F. Saeed, Urban Planning and Economy

Mayor A. Sohi asked if Council Members have any clarifying questions of anyone registered to speak. There was no one.

Moved by: J. Wright

Seconded by: A. Stevenson

That the Public Hearing on Charter Bylaw 19930 be closed.

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (13 to 0)

The following answered questions:

- C. Schlamp, Office of the City Clerk

Moved by: A. Stevenson

Seconded by: A. Salvador

That Charter Bylaw 19930 be read a first time.

In Favour (10): A. Sohi, T. Cartmell, M. Janz, A. Knack, A. Paquette, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Opposed (3): S. Hamilton, K. Principe, and J. Rice

Carried (10 to 3)

Moved by: A. Stevenson

Seconded by: A. Salvador

That Charter Bylaw 19930 be read a second time.

In Favour (10): A. Sohi, T. Cartmell, M. Janz, A. Knack, A. Paquette, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Opposed (3): S. Hamilton, K. Principe, and J. Rice

Carried (10 to 3)

Moved by: A. Stevenson

Seconded by: A. Salvador

That Charter Bylaw 19930 be considered for third reading.

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (13 to 0)

Moved by: A. Stevenson

Seconded by: A. Salvador

That Charter Bylaw 19930 be read a third time.

In Favour (10): A. Sohi, T. Cartmell, M. Janz, A. Knack, A. Paquette, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Opposed (3): S. Hamilton, K. Principe, and J. Rice

Carried (10 to 3)

3.11 Charter Bylaw 19935 - To allow for medium rise Multi-Unit Housing, Westmount

The following speaker made a presentation in opposition:

- T. Genge

The following speakers made presentations and answered questions in opposition:

- D. Groome
- K. Sherlock

The following members of Administration's delegation answered questions:

- S. McCabe, Deputy City Manager, Urban Planning and Economy
- A. Huizinga, Urban Planning and Economy
- F. Saeed, Urban Planning and Economy
- T. Pawlyk, Urban Planning and Economy
- A. Laughlin, Deputy City Manager, Integrated Infrastructure Services
- J. Inkpen, Office of the City Manager (Legal Services)
- K. Petrin, Urban Planning and Economy

Mayor A. Sohi asked if Council Members have any clarifying questions of anyone registered to speak.

The following speakers answered questions:

- J. Spurr
- D. Groome
- K. Sherlock

Mayor A. Sohi asked if Council Members have any clarifying questions of anyone registered to speak. There was no one.

Moved by: A. Stevenson

Seconded by: A. Knack

That the Public Hearing on Charter Bylaw 19935 be closed.

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (13 to 0)

Moved by: A. Stevenson

Seconded by: A. Knack

That Charter Bylaw 19935 be read a first time.

In Favour (12): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Opposed (1): J. Rice

Carried (12 to 1)

Moved by: A. Stevenson

Seconded by: A. Knack

That Charter Bylaw 19935 be read a second time.

In Favour (12): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Opposed (1): J. Rice

Carried (12 to 1)

Moved by: A. Stevenson

Seconded by: A. Knack

That Charter Bylaw 19935 be considered for third reading.

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Carried (13 to 0)

Moved by: A. Stevenson

Seconded by: A. Knack

That Charter Bylaw 19935 be read a third time.

In Favour (12): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Opposed (1): J. Rice

Carried (12 to 1)

4. Notices of Motion and Motions without Customary Notice

Mayor A. Sohi asked whether there were any Notices of Motion. There were none.

5. Adjournment

The meeting adjourned at 9:14 p.m., Tuesday, February 8, 2022.

Chair

City Clerk



Special City Council - Minutes

February 11, 2022

1:30 p.m.

Council Chamber, 2nd floor, City Hall

Present: A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, J. Wright

1. Call to Order and Related Business

1.1 Call to Order and Land Acknowledgement

Mayor A. Sohi called the meeting to order at 1:30 p.m., Friday, February 11, 2022, and acknowledged that City Council meets on the traditional land of Treaty 6 Territory. The Chair also acknowledged the diverse Indigenous peoples whose ancestors' footsteps have marked this territory for centuries such as: Cree, Dene, Saulteaux, Blackfoot, Nakota Sioux, as well as Metis and Inuit, and now settlers from around the world.

1.2 Roll Call

Mayor A. Sohi conducted roll call and confirmed the attendance of Members of City Council.

A. Corbould, City Manager; and T. Ward, R. Zheng and E. Norton, Office of the City Clerk, were also in attendance.

1.3 Adoption of Agenda

Moved by: A. Stevenson

Seconded by: K. Tang

That the February 11, 2022, Special City Council meeting agenda be adopted.

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Motion Carried (13 to 0)

1.4 Protocol Items

There were no Protocol Items.

2. Items for Discussion and Related Business

2.1 Select Items for Debate

The following item was selected for debate: 3.1.

2.2 Requests to Speak

Requests to Speak were not considered.

2.3 Requests for Specific Time on Agenda

There were no requests for items to be dealt with at a specific time on the agenda.

2.4 Vote on Bylaws not Selected for Debate

There were no Bylaws on the agenda.

3. Public Reports

3.1 COVID-19 Update - Verbal report

The following member of Administration's delegation made a presentation and answered questions:

- A. Corbould, City Manager

The following members of Administration's delegation answered questions:

- C. Sikora, Alberta Health Services
- N. Poirier, Community Services
- M. Plouffe, City Solicitor
- C. Owen, Deputy City Manager, Communications and Engagement
- R. Jevne, Acting Deputy City Manager, Community Services

Moved by: A. Paquette

Seconded by: S. Hamilton

That the February 11, 2022, Office of the City Manager verbal report OCM01086, be received for information.

In Favour (9): A. Sohi, T. Cartmell, S. Hamilton, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, and K. Tang

Opposed (4): M. Janz, A. Salvador, A. Stevenson, and J. Wright

Motion Carried (9 to 4)

The following answered questions:

- A. Giesbrecht, City Clerk
- T. Ward, Office of the City Clerk

Moved by: A. Sohi

Seconded by: S. Hamilton

That the Mayor, on behalf of Edmonton City Council, write a letter requesting that the Province of Alberta develop a formal bilateral consultation and engagement process with the City of Edmonton to discuss issues of mutual interest and that the Province of Alberta consult and seek input from the City of Edmonton before lifting further COVID 19 protocols.

In Favour (12): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Opposed (1): K. Principe

Motion Carried (12 to 1)

The following members of Administration's delegation answered questions:

- A. Corbould, City Manager
- A. Laughlin, Deputy City Manager, Integrated Infrastructure Services
- S. Padbury, Chief Financial Officer and Deputy City Manager, Financial and Corporate Services

Moved by: K. Tang

Seconded by: E. Rutherford

Hepa Air Filtration System - Effectiveness, Feasibility and Cost

That Administration explore the effectiveness, feasibility, and cost of installing HEPA air filtration systems in City-owned facilities as a preventative measure against COVID-19, and include any site-specific recommendations.

Due Date: Spring Supplemental Capital Budget Adjustment

In Favour (13): A. Sohi, T. Cartmell, S. Hamilton, M. Janz, A. Knack, A. Paquette, K. Principe, J. Rice, E. Rutherford, A. Salvador, A. Stevenson, K. Tang, and J. Wright

Motion Carried (13 to 0)

4. Bylaws

There were no Bylaws on the agenda.

5. Motions Pending

There were no Motions Pending on the agenda.

6. Private Reports

There were no Private Reports on the agenda.

7. Adjournment

The meeting adjourned at 4:34 p.m., Friday, February 11, 2022.

Chair

City Clerk

Requests to Reschedule Reports

City Council

February 22/24, 2022

5.1 Bus Network Redesign - Options for Expansion

City Operations- CO00606

Original Due Date: First Quarter 2022, Urban Planning Committee

Revised Due Date: March 23, 2022, Executive Committee

- Administration is requesting to reroute this report in order to combine with report CO00803, Bus Network Expansion Opportunities, as both motions are best dealt with together as one report to avoid duplication.

Recommendation:

That the revised due date of March 23, 2022, Executive Committee, for the City Operations report CO00606 Bus Network Redesign - Options for Expansion, be approved.

COMMUNITY REVITALIZATION LEVY UPDATE - DOWNTOWN, THE QUARTERS DOWNTOWN, BELVEDERE

RECOMMENDATION

That the February 22, 2022, Urban Planning and Economy report UPE00880, be received for information.

Report Purpose

Information only.

To inform Council of the performance of the three Community Revitalization Levy (CRL) areas, including financial projections, development progress and an update to ongoing Capital projects.

Executive Summary

- The City of Edmonton uses the Community Revitalization Levy (CRL) program in three areas (Capital City Downtown, The Quarters Downtown and Belvedere) to fund City investment in catalyst projects.
- A CRL is a provincially legislated funding tool that provides up to 20 years of stable funding for public infrastructure investments in redevelopment areas. As redevelopment occurs in CRL areas, the resulting increased property tax revenue, which includes both the municipal and provincial components, is dedicated to pay for CRL expenditures.
- The program is designed to promote private development and create vibrant, accessible and sustainable communities.
- Within each CRL area, a baseline property assessment is established in the year that the Plan is approved. Within CRL areas, increases in property tax revenue (both municipal and provincial) that result from new development and increases in property values above the established baseline, are dedicated to funding projects or investments within the CRL area.
- The levy is not an additional tax on property owners. Properties within CRL areas pay the same property taxes as they would if they were not in a CRL area.
- Administration updates its revenue projections for the 20-year span of each CRL on an annual basis.
- The COVID-19 pandemic has impacted each CRL but in unique ways. The Belvedere CRL revenue projection has improved from the previous forecast. The Downtown CRL revenue

COMMUNITY REVITALIZATION LEVY UPDATE - DOWNTOWN, THE QUARTERS DOWNTOWN, BELVEDERE

projection is stable when compared to last year with a small increase attributable to the inclusion of the Station Lands development. The Quarters CRL revenue projection has deteriorated over the last year.

- Three projection scenarios are provided for the Capital City Downtown CRL. The Medium scenario includes an increase of \$11 million to \$764 million from a year ago, although this is offset by increased borrowing costs.
- The projection for the Quarters CRL has been reduced by \$25 million from a year ago to \$131 million, due to assessment decreases and realigning expectations for future development with current economic realities.
- The projection for the Belvedere CRL tax levy revenue has increased by \$4 million to \$30.1 million, due to improved valuations for residential rental developments.

REPORT

The Community Revitalization Levy Plans approved by City Council and the Government of Alberta provide a sustainable funding source for public infrastructure investments needed to attract private development to the revitalization areas.

Capital City Downtown

The Capital City Downtown Community Revitalization Levy was approved in 2014 and commenced in 2015. By the end of 2021, the construction of Rogers Place and other downtown catalyst projects have spurred more than \$4.5 billion in new development that is complete or under construction. The Levy revenues that will be generated from this new development partly fund Rogers Place and its associated infrastructure, Alex Decoteau Park, acquisition of land for a new park in the Warehouse Campus area, new upgraded drainage servicing and the Jasper Avenue New Vision project. The Levy revenues are also approved to fund construction of the new park in the Warehouse Campus area, Green and Walkable streetscape improvements, renovations to Centennial Plaza and a pedestrian bridge across McDougall Hill.

In 2021, City Council approved Bylaw 19820 to amend the Capital City Downtown Community Revitalization Levy Bylaw. Changes to the plan included adding the 103A Avenue Pedway as a Catalyst Project, and minor clarifications and adjustments to the scope of several other projects. The Bylaw was approved by the Province on January 26, 2022.

The Quarters Downtown

The Quarters Downtown Community Revitalization Levy was approved in 2011 and commenced in 2012. To date, the Levy has funded \$97 million in public infrastructure improvements for catalyst projects such as The Armature, upgraded drainage servicing, Kinistinaw Park and the adaptive reuse of City-owned buildings into new art spaces. These investments have attracted over \$800 million of completed, in-progress and planned private developments.

Belvedere

The Belvedere Community Revitalization Levy was approved in 2012 and commenced in 2013. Construction of Station Pointe infrastructure improvements, including streetscapes, plazas and

COMMUNITY REVITALIZATION LEVY UPDATE - DOWNTOWN, THE QUARTERS DOWNTOWN, BELVEDERE

the CN safety wall, were completed in 2015. To date, land sales and development have progressed more slowly than anticipated. In 2020, Council approved changes to the land use regulations in order to facilitate land sales and development.

Attachment 1 provides a brief update on the status of each of the capital projects funded by the CRLs.

Funding/Revenue Availability

There is a timing difference between project expenses and Community Revitalization Levy revenue generation. In each of the three levy areas debt was used to finance projects. Debt servicing expenses associated with capital investment began immediately, before there was sufficient revenue generated to fully cover those costs. These annual shortfalls have resulted in a negative reserve position for each of the three Levies. These reserves will be repaid when annual Levy revenues start to exceed annual expenditures.

For example, the Capital City Downtown Levy has seen its annual revenues exceed its annual expenses from 2019 to 2021. As a result the Capital City Downtown reserve deficit has been reduced by more than \$9 million over that period.

If the Community Revitalization Levies progress as planned for the Downtown and as reserves are fully repaid, a positive reserve balance will accumulate. At this point, instead of borrowing, Council would have the option to fund catalyst projects in the Downtown Community Revitalization Levy Area with the excess of the revenue over expenses that is accumulating in the reserve. Administration will only bring forward future catalyst projects for capital budget approval if there is sufficient financial capacity and the project is included in the Downtown Community Revitalization Levy Plan.

Revenue Scenarios

Community Revitalization Levy revenue is primarily a function of three factors:

- New development that occurs
- Increases in assessed value of existing properties within the levy areas over the base years, and
- Mill rates.

The Belvedere Community Revitalization Levy Plan includes revenue from land sales in addition to CRL revenue.

Each Edmonton Community Revitalization Levy can span up to 20 years from the date of commencement: Capital City Downtown (January 1, 2015 - December 31, 2034), The Quarters Downtown (January 1, 2012 - December 31, 2031) and Belvedere (January 1, 2013 - December 31, 2032).

Revenue scenarios for the three Community Revitalization Levies have been updated to reflect Edmonton's current economic situation. Administration will continue to adjust the long-term

COMMUNITY REVITALIZATION LEVY UPDATE - DOWNTOWN, THE QUARTERS DOWNTOWN, BELVEDERE

assumptions for market value growth based on new market information on an annual basis. Administration takes a conservative approach in setting assumptions.

One revenue scenario is prepared for the Quarters and Belvedere Levies, while three revenue scenarios (High, Medium, and Low) are prepared for the Capital City Downtown Levy. This is because the Capital City Downtown Levy has a wider range of potential outcomes since a larger proportion of its revenue comes from commercial properties, which often demonstrate greater volatility in assessed values.

Capital City Downtown

The pace and volume of development underway within the Levy area significantly exceeds what was anticipated when the plan was prepared in 2013. However, this has been offset in part by a decline in office property valuations, and a sharp decline in retail and hotel valuations resulting from the COVID-19 pandemic.

Continued investment in CRL Catalyst Projects like the Warehouse Park will support the Downtown's recovery from the COVID-19 pandemic and encourage further redevelopment. These capital investments are further supplemented by a range of programs like the Downtown Vibrancy Strategy, and the 2021 Economic Recovery Construction Grant.

The current projections for the Levy in the medium scenario have increased by \$11 million from a year ago to \$764 million. This is driven by additional development activity, counteracted by ongoing declines in commercial properties resulting from the COVID-19 pandemic.

The high revenue scenario generates sufficient funding to complete all funded (approved) and unfunded (planned but not yet approved) catalyst projects included in the Community Revitalization Levy plan. The medium scenario generates sufficient funding to complete most of the catalyst projects included in the Community Revitalization Levy plan.

In these scenarios, if the remaining unfunded catalyst projects do not proceed, and when the CRL reserve accumulates a positive balance sufficient to cover all remaining debt obligations, then the CRL may be terminated early. The municipal property taxes would then go into the general tax pool and the provincial property taxes would go to the Province.

The low scenario projection does not currently generate sufficient revenue to cover all funded catalyst projects, although ongoing municipal tax revenues would retire the remaining debt in 2035, one year after the CRL ends.

Administration will continue to monitor revenues and will adjust the implementation schedule of future catalyst projects as required. Administration will only recommend funding unfunded catalyst projects in future capital budgets once projected revenues are sufficient to cover the capital and debt-servicing costs.

In addition to updating the low, medium and high scenarios, a "stress test" scenario has been prepared. The stress test scenario assumes no further development other than the projects currently under construction and that assessed values will decline sharply and recover slowly. While this scenario is highly unlikely, it would result in a shortfall of \$81 million at the end of the

COMMUNITY REVITALIZATION LEVY UPDATE - DOWNTOWN, THE QUARTERS DOWNTOWN, BELVEDERE

CRL period. Ongoing municipal tax revenues would retire all debt by 2036, two years after the CRL ends.

Further detail about the financial projections is available in Attachment 2.

The Quarters Downtown

Administration has prepared a revenue scenario for the Quarters Downtown. The revenue projection has decreased from the previous year, due to decreases in assessed values, and adjustments to anticipated future development based on current market conditions. This results in a projected decrease of \$25 million for a total of \$131 million over the 20-year levy period. This projection indicates that revenues from the Community Revitalization Levy will not be sufficient to cover all outstanding principal and interest costs of all Quarters catalyst projects approved to date before the 2031 expiry of the Levy. The shortfall is projected to be \$15.5 million. Ongoing municipal tax revenues that continue beyond 2031 would retire the remaining debt by 2033, two years after the CRL ends.

In addition to updating the scenario for The Quarters Downtown, a “stress test” scenario has been prepared, with similar assumptions to the Capital City Downtown Levy. While this stress test scenario is unlikely, the increase in municipal taxes will continue beyond 2031 and would generate enough revenue to repay all outstanding principal and interest charges by 2044.

Further detail about the financial projections is available in Attachment 3.

Belvedere

Administration has prepared a revenue scenario for Belvedere. Development in the area has not progressed as anticipated in the original plan. However, in the last year, improving valuations of residential rental developments have increased Administration’s revenue expectations for the Belvedere Levy by \$4.0 million to \$30.1 million. The projections indicate revenues from the Community Revitalization Levy and land sales will not be sufficient to cover all outstanding principal and interest charges before the 2032 expiry of the Levy. The shortfall is projected to be \$8.1 million. Ongoing municipal tax revenues that continue beyond 2032 would retire the remaining debt by 2036.

A “stress test” scenario was also prepared for Belvedere. In this stress test scenario, the increase in municipal taxes will continue beyond 2032 and would generate enough revenue to repay all outstanding principal and interest charges by 2039.

Further detail is available in Attachment 4.

Budget/Financial Implications

Capital profiles or service packages for unfunded Community Revitalization Levy projects in The Quarters Downtown and Capital City Downtown Plans will only be brought forward for Council consideration as part of future capital budgets if Community Revitalization Levy revenues are sufficient.

COMMUNITY REVITALIZATION LEVY UPDATE - DOWNTOWN, THE QUARTERS DOWNTOWN, BELVEDERE

Legal Implications

A Community Revitalization Levy Bylaw is terminated at the earliest of the following: the end of 20 years (from the year in which the Bylaw was approved by the Province); the date that all borrowings for the Community Revitalization Levy area are repaid or recovered from the revenues; or an earlier date specified by the Province.

On August 31, 2021, City Council approved Bylaw 19820, which amends the Capital City Downtown CRL Plan. The Bylaw was approved by the Province on January 26, 2022.

COMMUNITY INSIGHT

Each project funded by the Community Revitalization Levies seeks community insight as an essential part of project development, including engagement with impacted and marginalized communities. Further details on engagement activities undertaken and planned for each project are available in Attachment 1.

As this report provides quantitative financial results and projections related to these projects, additional community insight is not gathered for this report.

GBA+

The set of projects eligible for CRL funding in each CRL was established prior to the City's adoption of GBA+. Since being adopted, GBA+ considerations have informed the design and development of each project funded by the Community Revitalization Levies so that the projects are increasingly inclusive and accessible. For example, this has included designing sidewalks to be more accessible to those with disabilities, prioritizing child-friendly design and coordinating with a nearby child care facility in Centennial Plaza, or coordinating sidewalk improvements with affordable and supportive housing providers.

ATTACHMENTS

1. Community Revitalization Levy Capital Projects Update
2. Capital City Downtown Community Revitalization Levy - Financial Projections
3. The Quarters Downtown Community Revitalization Levy - Financial Projections
4. Belvedere Community Revitalization Levy - Financial Projections

Community Revitalization Levy Capital Projects Update

Downtown CRL Projects

City Council approved two Capital Profiles for the Downtown CRL as part of the 2019-2022 Capital Budget:

CM-50-5050 - CRL Projects - Planning and Design

This composite profile provides funding for design of each project, through the preliminary design phase (to Checkpoint 3).

CM-74-4100 - Downtown CRL

This composite profile provides funding for delivery of projects (to Checkpoint 5).

At Checkpoint 3, each project with a total cost of more than \$2 million will require Council approval of a standalone Capital Profile for that project. Funding for the standalone profile will be transferred from the CM-74-4100 Downtown CRL profile, so no new funding will be required.

Projects with a total cost of more than \$2 million are profiled here.

Warehouse Park
<p>Scope:</p> <ul style="list-style-type: none"> Design and delivery of a new park and washroom facility in the Warehouse District of Downtown, between 106 Street and 108 Street and Jasper Avenue to 102 Avenue. Project development will include the application for closure of 107 Street between Jasper Avenue and 102 Avenue. Design and delivery of the renewal of 106 Street between Jasper Avenue and 102 Avenue.
<p>Budget:</p> <ul style="list-style-type: none"> Approved funding to Checkpoint 3 is provided through CM-50-5050 (CRL Projects - Planning and Design) in the amount of \$3,060,494. Project delivery to Checkpoint 5 will be secured through Council approval of a standalone capital profile, with funding to be sourced from CM-74-4100 (Downtown CRL).
<p>Progress Update:</p> <ul style="list-style-type: none"> Two lots at the south-west corner of the park were recently acquired, increasing the size of the park to 1.47 hectares. Procurement of the Prime Consultant team is complete, which will provide landscape architecture, architecture, engineering, and engagement services. Selection of the artist to develop public art for the project by the Edmonton Arts Council is complete. Development of the public art and design process will be

integrated.
<p>Engagement:</p> <ul style="list-style-type: none"> Public engagement was completed in the Strategy Phase of the project. Public and Stakeholder engagement will occur throughout the design phases of the project, with the first phase of public engagement anticipated in Q2 2022. This public engagement will be inclusive of all key stakeholders, including the community league, business association, educational institutions, developers, children, and marginalized and hard-to-reach Edmontonians with lived experience.
<p>Schedule:</p> <ul style="list-style-type: none"> Completion of the Design Phase of the project is scheduled for May 2023 with the project in service in 2025.

Jasper Avenue New Vision Phase II and 97 Street Streetscaping
<p>Scope:</p> <ul style="list-style-type: none"> The project includes the reconstruction and realignment of Jasper Avenue from 97 Street to 100 Street, the east side of 100 Street from McDougall Hill to Jasper Avenue, Thornton Court area, and 97 Street from Jasper Avenue to 102 Avenue.
<p>Budget:</p> <ul style="list-style-type: none"> This project is funded for delivery through Checkpoint 5 by standalone profiles 17-74-4103 and 19-20-5001. The approved budget is \$39.9 million.
<p>Progress Update:</p> <ul style="list-style-type: none"> Construction is substantially complete on this project. Remaining carry forward work is limited to the Thornton Court area south of Jasper Avenue and some final landscaping deficiencies.
<p>Engagement:</p> <ul style="list-style-type: none"> Engagement was conducted as part of the concept and preliminary design phases in 2017 and 2018.
<p>Schedule:</p> <ul style="list-style-type: none"> Construction is substantially complete and expected to be completed in 2022.

Centennial Plaza Renewal
<p>Scope:</p> <ul style="list-style-type: none"> The Centennial Plaza Redevelopment project provides an opportunity to create a more attractive downtown open space for the public to gather and for small events, with child friendly elements. The project area includes Centennial Plaza (9904-9924 101A Avenue, immediately south of the library), the rehabilitation of the Post Office Clock Plaza (10145-100 Street NW, North of the Westin Hotel) and Judy Padua Way.

<p>Budget:</p> <ul style="list-style-type: none"> • This project is funded for delivery through Checkpoint 5 by standalone profile 21-50-9104. • The approved budget is \$14.2 million, of which \$11.9 million is CRL funding.
<p>Progress Update:</p> <ul style="list-style-type: none"> • Planning and Design has been finalized • Project has transitioned to Delivery in August 2021 • Detailed Design is 50% complete
<p>Engagement:</p> <ul style="list-style-type: none"> • Engagement was conducted as part of the concept and preliminary design completed between 2018 and 2020 • What We Heard Reports are posted on the project webpage
<p>Schedule:</p> <ul style="list-style-type: none"> • Completion of Detailed Design scheduled for Q2 2022 • Construction scheduled to begin in Q2 2022 • Construction scheduled to be complete in Q4 2023

<p>Green and Walkable - Downtown Streetscapes 106 Street (100 Avenue to 104 Avenue)</p>
<p>Scope:</p> <ul style="list-style-type: none"> • The Capital City Downtown Plan calls for improvements to Downtown roadways and streetscapes. This project includes streetscaping on 106 Street from 100 Avenue to 104 Avenue, supporting safe and comfortable pedestrian movement, sidewalk vibrancy, quality urban design, and more trees and greenery.
<p>Budget:</p> <ul style="list-style-type: none"> • Approved funding to Project Develop and Delivery Model (PDDM) Checkpoint 2 is through 15-74-4109 (Future Phase Green and Walkable Downtown) in the amount of \$450,000. • The block between Jasper Avenue and 102 Avenue will be incorporated within the Warehouse Park project. The remainder of the area is not funded beyond Checkpoint 2.
<p>Progress Update:</p> <ul style="list-style-type: none"> • Conceptual planning work was conducted in 2019 and 2020. • Concept plan validation will need to be conducted in the future with the preliminary design.
<p>Engagement:</p> <ul style="list-style-type: none"> • Public and stakeholder engagement was completed during the concept planning phase of the project in 2019 and 2020. Feedback was utilized to inform the conceptual design plan for the corridor. Based on feedback the City increased the number of street trees, added tactile walkway surfaces on intersection ramps, and included a drop off zone, among other elements.

Schedule:

- Conceptual planning was completed in 2020.
- The block between Jasper Avenue and 102 Avenue will be designed and constructed as part of the Warehouse Park project.
- No further design or construction for the remainder of the street is scheduled at this time. Timing of further work will depend on the progress of development.

Green and Walkable - Downtown Streetscapes ***107 Street (99 Avenue to Jasper Avenue)***

Scope:

- The Capital City Downtown Plan calls for improvements to Downtown roadways and streetscapes. This project includes streetscaping on 107 Street from 99 Avenue to Jasper Avenue, supporting safe and comfortable pedestrian movement, sidewalk vibrancy, quality urban design, and more trees and greenery. The condition of this street requires rehabilitation.

Budget:

- Approved funding for project development is through 15-74-4109 (Future Phase Green and Walkable Downtown) in the amount of \$900,000.
- Project delivery to PDDM Checkpoint 5 will require Council approval of a standalone capital profile.
- Funding for the project will be from a combination of available road renewal funding and streetscape enhancements funded through the Downtown CRL.

Progress Update:

- Conceptual planning work was conducted in 2019 and 2020.
- Concept plan validation and preliminary engineering are anticipated to begin in 2024, with construction anticipated to begin in 2025, pending funding confirmation.

Engagement:

- Public and stakeholder engagement was completed and informed the concept planning phase of the project in 2019 and 2020. Based on feedback the City increased the number of street trees, added pedestrian level lighting and increased the number of benches, among other elements.
- Further engagement will be conducted during the next stages of design.

Schedule:

- Conceptual planning work was conducted in 2019 and 2020.
- Further design is anticipated to begin tentatively in 2024.
- Construction is to be confirmed during the 2023 to 2026 Capital Budget Cycle.

Green and Walkable - Downtown Streetscapes ***103 Avenue (100 Street - 101 Street)***

<p>Scope:</p> <ul style="list-style-type: none"> This project includes streetscaping on 103 Avenue from 100 Street to 101 Street, supporting safe and comfortable pedestrian movement, sidewalk vibrancy, quality urban design, and more trees and greenery.
<p>Budget:</p> <ul style="list-style-type: none"> Approved funding for project development and delivery is through profile 21-50-9101 in the amount of \$5,827,000 (of which \$5.26 million is funded by the Downtown CRL)
<p>Progress Update:</p> <ul style="list-style-type: none"> Procurement for the construction is underway. Construction is anticipated to begin in Spring 2022.
<p>Engagement:</p> <ul style="list-style-type: none"> Public engagement was conducted during planning and design phases to inform the corridor plan. Based on feedback the City added more greenery, enhanced crosswalks at 100 and 101 Street and conversation area seating, among other changes. Information will be shared with the public regarding construction activities. Otherwise, no further public engagement is anticipated. The project team is actively working with stakeholders and land owners on 103 Avenue.
<p>Schedule:</p> <ul style="list-style-type: none"> Construction is planned to take place during the 2022 construction season, with seasonal landscaping work such as plants, shrubs and trees to occur during the 2023 construction season.

Green and Walkable - Downtown Streetscapes **99 Street (Jasper Avenue - 102 Avenue)**

<p>Scope:</p> <ul style="list-style-type: none"> This project includes streetscaping on 99 Street between Jasper Avenue and 102 Avenue, supporting safe and comfortable pedestrian movement, sidewalk vibrancy, quality urban design, and more greenery. This project will also include necessary lifecycle repairs to the Library Parkade roof and waterproofing membrane, which is underneath the roadway, as well as associated reconstruction of road and sidewalk over the roof. This scope is not funded by the CRL.
<p>Budget:</p> <ul style="list-style-type: none"> Funding is approved up to Checkpoint 4. Downtown CRL (CM-50-5050) is providing \$1,866,000 for the streetscaping work. Additional funds will be provided for renewal aspects associated with this corridor. Due to the magnitude of this project, approval of a standalone capital profile may be required prior to moving forward with delivery of this project.

<p>Progress Update:</p> <ul style="list-style-type: none"> • Procurement of a design consultant is underway. • The development design phase is anticipated to be complete toward the end of 2022.
<p>Engagement:</p> <ul style="list-style-type: none"> • Engagement activities will begin in 2022.
<p>Schedule:</p> <ul style="list-style-type: none"> • All design components (completion of detailed design) for this project are to be completed in early 2023.

<p>Green and Walkable - Downtown Streetscapes <i>103A Avenue (97 Street - 101 Street) / 99 Street (103A Avenue - North end of Churchill Station) / 99 Street (North end of Churchill Station - 102 Avenue)</i></p>
<p>Scope:</p> <ul style="list-style-type: none"> • This project includes streetscaping on 103A Avenue and 99 Street, supporting safe and comfortable pedestrian movement, sidewalk vibrancy, quality urban design, and more trees and greenery. The section of 99 Street (North end of Churchill Station - 102 Avenue) work is only approved to the end of concept design, future work (preliminary, detailed design and construction) are subject to future approval. • This project will be delivered in conjunction with the <i>103A Avenue Pedway</i> project described below.
<p>Budget:</p> <ul style="list-style-type: none"> • Approved funding to Checkpoint 3 is provided through CM-74-4100 (Downtown CRL) in the amount of \$2,183,523. • Project delivery to Checkpoint 5 will require Council approval of a standalone capital profile at a future date.
<p>Progress Update:</p> <ul style="list-style-type: none"> • Procurement of a consultant is in progress. • Conceptual design is anticipated to be complete in late 2022, with preliminary design to follow with an anticipated completion in Fall 2023.
<p>Engagement:</p> <ul style="list-style-type: none"> • Engagement activities will begin in 2022. Engagement for the streetscapes project will be coordinated with the 103A Avenue Pedway and 99 Street (Jasper Avenue - 102 Avenue) project.
<p>Schedule:</p> <ul style="list-style-type: none"> • All design components (completion of detailed design) for this project are anticipated to be completed in Q1 2024.

Green and Walkable - Public Open Spaces <i>Beaver Hills House Park/Michael Phair Park</i>
<p>Scope:</p> <ul style="list-style-type: none"> Design and construction of enhancements to the parks to make them safer, more accessible and open up vibrancy opportunities within the park and adjacent properties.
<p>Budget:</p> <ul style="list-style-type: none"> Approved funding to checkpoint 3 is provided through CM-50-5050 (CRL Projects - Planning and Design) in the amount of \$300,000. Project delivery to Checkpoint 5 will require Council approval of a standalone profile, with funding to be requested in the 2023-2026 Capital Budget.
<p>Progress Update:</p> <ul style="list-style-type: none"> Design consultant procurement has been completed through Q4 2021. The successful design proponent has been selected. Consultant start-up and design kick-off occur in late Q4 2021. Internal/external engagement is planned for Q1 2022 in support of project development activities.
<p>Engagement:</p> <ul style="list-style-type: none"> Internal and External Engagement activities will begin in Q1 2022 Public engagement plans have been drafted but will be refined and finalized as part of the consultant scope following startup.
<p>Schedule:</p> <ul style="list-style-type: none"> Development Design (Checkpoint 3) is anticipated to be completed in Q3 2022. Project delivery to Checkpoint 5 will require Council approval of a standalone profile, with funding to be requested in the 2023-2026 Capital Budget.

River Valley Promenades - McDougall Hill Pedestrian/Cyclist Bridge
<p>Scope:</p> <ul style="list-style-type: none"> Planning and design for a pedestrian and cyclist bridge across McDougall Hill, from the plaza at the top of the 100 Street Funicular to the open park space along MacDonald Drive.
<p>Budget:</p> <ul style="list-style-type: none"> Approved funding for project development is provided through CM-50-5050 (CRL Projects - Planning and Design). Project delivery to Checkpoint 5 will require future Council approval of a standalone capital profile, with funding to be sourced from CM-74-4100 (Downtown CRL).
<p>Progress Update:</p> <ul style="list-style-type: none"> Concept design is currently underway with anticipated planning completion in early to mid 2022.

Attachment 1

<ul style="list-style-type: none">Options are being explored and will be refined after stakeholder and public engagement activities.
Engagement: <ul style="list-style-type: none">An engagement strategy is currently being developed.Initial stakeholder meetings are anticipated to follow finalization of the engagement strategy.
Schedule: <ul style="list-style-type: none">Concept design is currently underway with anticipated Checkpoint 2 completion in early to mid 2022.Preliminary engineering (Checkpoint 3) anticipated completion in late 2022.

103A Avenue Pedway
Scope: <ul style="list-style-type: none">Design and construction of an underground pedway from Churchill LRT Station to the Station Lands site.This project will be delivered in conjunction with the <i>Green and Walkable Downtown Streetscapes - 103A Avenue (97 Street to 101 Street)</i> project described above.
Budget: <ul style="list-style-type: none">Funding for this project has been approved, but no spending or borrowing can take place until the province approves the CRL Plan Amendment (Bylaw 19820).
Progress Update: <ul style="list-style-type: none">Procurement of a consultant is in progress. An RFP is anticipated to be issued and consultant assignments awarded by the end of Q1 2022.Preliminary design completion is planned for Q2 2023.
Engagement: <ul style="list-style-type: none">Engagement activities will begin in 2022. Engagement for the 103A Avenue Pedway and 99 Street (Jasper Avenue - 102 Avenue) project will be coordinated with the streetscape 103A Avenue (97 Street - 101 Street) project.
Schedule: <ul style="list-style-type: none">All design components (completion of detailed design) for this project are to be completed in Q1 2024 as the tendering is anticipated to start by the end of Q1 of 2024. Construction is planned to be completed by the end of 2025.

The Quarters Downtown Projects

Kinistinaw Park Phase I and II
Scope: <ul style="list-style-type: none">Linear park that fronts the Armature. Kinistinaw is designed to be the

<p>neighbourhood's focal point and gathering space. The park connects the open space network to the River Valley and features a canopy, seating and programming areas, children's play features, and public art.</p> <ul style="list-style-type: none"> Phase I is the linear park that fronts the Armature south of 103 Avenue. Phase II extends the park north of 103 Avenue by a few lots.
<p>Budget:</p> <ul style="list-style-type: none"> Phase I - Approved budget to Checkpoint 5 - \$6,491,000 (profile 17-28-1009) Phase II - Approved budget to Checkpoint 5 - \$2,499,000 (profile 21-30-9301)
<p>Progress Update:</p> <ul style="list-style-type: none"> Phase I - Complete and in service to the public. Phase II - Construction is underway and will be completed in 2022.
<p>Engagement:</p> <ul style="list-style-type: none"> Phase I and II - Completed public engagement between October 2016 and January 2019. The project involved a significant stakeholder and public consultation process. Input from community organizations, residents, and members of the public contributed to establishing a comprehensive vision for the park, and ultimately informed the development of the design.
<p>Schedule:</p> <ul style="list-style-type: none"> Phase I - Construction completed fall 2020. Phase II - Construction is underway and will be completed in 2022.

<p>Boyle Renaissance Phase III</p>
<p>Scope:</p> <ul style="list-style-type: none"> In consultation with the community, Administration updated the Boyle Renaissance Master Plan in 2019. The Plan outlines areas for future development and includes an implementation strategy for land remediation, construction of a community garden, walkways, and roads.
<p>Budget:</p> <ul style="list-style-type: none"> Remediation budget of \$1 million.
<p>Progress Update:</p> <ul style="list-style-type: none"> Master plan was updated in 2019 to confirm prioritization of open space elements. Remediation of contaminated lands was completed in Q4 of 2021.
<p>Engagement:</p> <ul style="list-style-type: none"> Public engagement to update the Phase III Master Plan was completed in May 2019.
<p>Schedule:</p> <ul style="list-style-type: none"> Remediation, completed 2021. Topsoil and sod to be placed Q2 2022 Rezoning - 2022 Community Garden - 2022-23 Road network - 2024-2025 (through Building Great Neighbourhoods)

Iron Works Rehabilitation
<p>Scope:</p> <ul style="list-style-type: none">• Phased rehabilitation of the Iron Works complex• Phase 1 - Envelope Rehabilitation, roof replacement and envelope stabilization• Phase 2 - Base Building, design and construction• Phase 3 - Tenant Fit-Up (Administration is securing an anchor tenant)
<p>Budget:</p> <ul style="list-style-type: none">• Approved budget of \$14 million for design and delivery of Phases 1 and 2, plus design of Phase 3 (Profile 21-10-9103)
<p>Progress Update:</p> <ul style="list-style-type: none">• Design and construction work is underway. Administration is working with the Edmonton Arts Council as anchor tenant for the Iron Works and South Annex, and is currently looking for a compatible tenant for the North Annex.
<p>Engagement:</p> <ul style="list-style-type: none">• Public engagement was completed as part of planning for the Boyle Renaissance Master Plan, which was updated in 2019.
<p>Schedule:</p> <ul style="list-style-type: none">• Phase 1 - Construction began Q3, 2021 and will be complete in 2022• Phase 2 - Construction 2022 - 2023

Belvedere CRL Projects

All CRL funded projects are complete in the Belvedere area.

Capital City Downtown Community Revitalization Levy - Financial Projections

Program Overview

The Capital City Downtown CRL Plan (Bylaw 16521) was adopted by Council on September 17, 2013, and approved by the Province on April 16, 2014. The CRL Plan identifies a set of strategic infrastructure investments in the Downtown area (Catalyst Projects) that will accelerate the redevelopment of the area, attract new businesses, create a more complete and vibrant Downtown neighbourhood, encourage quality urban design, and increase the use of Downtown amenities.

On August 31, 2021, City Council approved Bylaw 19820, which amends the Capital City Downtown CRL Plan. The Bylaw was approved by the Province on January 26, 2022.

The CRL applies both the municipal and education taxes related to the incremental assessed value over the baseline to pay for the debt servicing associated with the catalyst projects, other related costs, and project office costs. The assessment baseline for the CRL is December 31, 2014.

Annual program shortfalls will be transferred to the Downtown CRL reserve to be recovered through future CRL revenues. The CRL can remain in place for up to a maximum of 20 years from 2015 to 2034, the date that all borrowings are repaid or recovered from the revenues, or an earlier date specified by the province.

Financial Update:

This attachment includes three sections:

1) Current 20-year Revenue Projections

Updated Low, Medium and High Revenue scenarios, and how they compare to projections that were previously shared with Council.

2) Revenue Projections vs. Approved and Potential Expenditures

A comparison of current revenue projection scenarios with expenditures related to approved CRL-funded projects and potential future CRL-funded projects.

Includes a description of assumptions used in developing the different revenue scenarios.

3) Detailed Budget Projections

Attachment 2

Updated year-by-year budget projections for the Downtown CRL,
based on the Medium Revenue Scenario.

Current 20-year Revenue Projections

This chart compares the revenue projections for the Capital City Downtown CRL at three points in time. As part of the approval process each of the CRL Plans was required to show low, medium and high revenue scenarios.

Given the size and complexity of the Capital City Downtown CRL, Administration has continued to present low, medium and high scenarios. The medium scenario has been consistently used for budget and reporting purposes.

Projected Revenue (\$ millions)	Scenarios		
	High	Medium	Low
Current Projection	\$882	\$764	\$704
February 22, 2021 City Council report UFCSD00222 Community Revitalization Levy Update - Downtown, The Quarters Downtown, Belvedere	\$825	\$753	\$710
Approved Capital City Downtown CRL Plan (September 2013)	\$1,156	\$941	\$597

Current Revenue Projections vs. Approved and Potential Expenditures

From 2014 to 2034 (entire life of the Capital City Downtown CRL)
(\$millions)

	Revenue Scenario 1 HIGH (Note 1)	Revenue Scenario 2 MEDIUM (Note 2)	Revenue Scenario 3 LOW (Note 3)	Revenue Scenario 4 STRESS TEST (Note 4)
Revenue				
CRL Revenue	882	764	704	633
Expenses (Note 5)				
<u>Funded Project Costs</u>				
Debt Servicing for Funded Projects	622	622	622	622
<u>Other CRL Costs (Note 6)</u>	94	94	94	94
<u>Subtotal - Funded Project Costs and Operating Expenses</u>	<u>716</u>	<u>716</u>	<u>716</u>	<u>716</u>
Excess/(Deficient) CRL Revenue				
<u>Funded Projects and Operating Expenses</u>	<u>166</u>	<u>48</u>	<u>-12</u>	<u>-83</u>
<u>Unfunded Project Costs</u>				
Capital Projects 2023 and beyond (Note 7)	146	146	146	146
<u>Subtotal - All CRL Projects</u>	<u>862</u>	<u>862</u>	<u>862</u>	<u>862</u>
Excess/(Deficient) CRL Revenue				
<u>All CRL Projects</u>	<u>20</u>	<u>(98)</u>	<u>(158)</u>	<u>(229)</u>

Notes:

- High Scenario Assumptions:

Market Value Change:

 - Hotel and Retail valuations to return to pre-pandemic levels by 2026.
 - Residential properties, 2022-25: 3 per cent cumulative to +13 per cent cumulative.
 - Office properties, 2022-25: 2 per cent cumulative.
 - 2026-34: 3 per cent per year

New Development:

20 year development based on 70 to 90 per cent of G.P. Rollo & Associates' development forecast
- Medium Scenario Assumptions:

Market Value Change:

 - Hotel and Retail valuations to return to pre-pandemic levels by 2028.
 - Residential properties, 2022-25: -3 per cent cumulative to +7 per cent cumulative.
 - Office properties, 2022-25: -4 per cent cumulative.
 - 2026-34: 3 per cent per year

New Development:

20 year development based on 40 to 70 per cent of G.P. Rollo & Associates' development forecast

- 3 Low Scenario Assumptions:
Market Value Change:
- Hotel and Retail valuations to return to pre-pandemic levels by 2031.
 - Residential properties, 2022-25: -10 per cent cumulative to 0 per cent cumulative.
 - Office properties, 2022-25: -11 per cent cumulative.
 - 2026-34: 2 per cent per year
- New Development:
20 year development based on 40 to 50 per cent of G.P. Rollo & Associates' development forecast
- 4 "Stress Test" Scenario Assumptions:
Market Value Change:
- Hotel and Retail valuations do not return to pre-pandemic levels by the CRL's conclusion in 2034.
 - Residential properties, 2022-25: -20 per cent cumulative to -10 per cent cumulative.
 - Office properties, 2022-25: -19 per cent cumulative.
 - 2026-34: 2 per cent per year
 - 2026-34: 2 per cent per year
- New Development:
Only buildings currently under construction are included.
- 5 Principal and Interest:
Expenses include all principal and interest charges for funded and unfunded projects.
- 6 Other Costs
Other costs include project office costs, an allowance for assessment appeal losses, and a \$2.53 million annual payment to cover arena borrowing costs originally intended to be funded by incremental parking revenues, as well as any operating costs related directly to specific projects (such as grant payments for private amenity spaces associated with the Station Lands Project)
- 7 Unfunded Project Costs
This includes projects that have not been initiated, or are only partially complete, such as Jasper Avenue New Vision. City Council may approve funding for these projects in future budgets. These projects have not been scoped in detail. The cost estimate is intended to provide an order of magnitude of the potential costs. Timing and implementation of these projects will depend on the amount of funds available from the CRL.

Capital City Downtown CRL - Detailed Budget Projection

(\$000)	Project Total	Actual 2014 - 2019	Actual 2020	-----Projected-----			2024 to 2034
				2021	2022	2023	
Revenues							
Community Revitalization Levy	\$ 764,479	\$ 65,428	\$ 30,427	\$ 29,064	\$ 28,201	\$ 29,898	\$ 581,461
Total Revenues	764,479	65,428	30,427	29,064	28,201	29,898	581,461
Expenditures							
Debt Servicing	621,873	75,421	20,035	23,293	25,490	28,325	449,309
Other Costs (Note 4)	93,737	9,879	4,359	5,771	5,680	4,032	64,016
Total Expenditures	715,610	85,300	24,394	29,064	31,170	32,357	513,325
Net Income (Loss) (Note 1)	48,869	(19,872)	6,033	-	(2,969)	(2,459)	68,136
Cumulative Net Income (Deficit), Beginning Adjustments	-		(19,872)	(13,839)	(13,839)	(16,808)	(19,267)
Cumulative Net Income (Deficit), Reserve Balance	\$ 48,869	\$ (19,872)	\$ (13,839)	\$ (13,839)	\$ (16,808)	\$ (19,267)	\$ 48,869
Previous Cumulative Net Income (Deficit), Reserve Balance (Note 2)		(19,872)	(14,305)	(14,789)	(15,048)	(18,506)	124,489
Net Change (Note 3)		\$ -	\$ 466	\$ 950	\$ (1,760)	\$ (761)	\$ (75,620)

Explanatory Notes

- Current Projection

The current projection for the Capital City Downtown has been revised to reflect current economic conditions. Community Revitalization Levy Revenue over 20 years has been increased by \$11 million.

The Revenue Scenario presented in this forecast and in the Previous Projection reflect the Medium Scenarios.

Debt Servicing costs have increased as a result of higher interest rates.
- Previous Projection

The previous projection reflects the projection included in the February 22, 2021 Council Report UFCSD00222, adjusted for actual results for the year ended December 31, 2020.
- Net Change

In 2021, the CRL is projected to break even at year end. This compares to a previous projected annual deficit of \$(484). Annual program surpluses and shortfalls are transferred to the reserve to be recovered by future CRL revenues.

The Capital City Downtown Reserve has a projected 2021 year-end deficit balance of \$(13,839) which is a decrease of \$950 from the previous projection of \$(14,789). The balance in the reserve is an accumulation of debt servicing costs and other operating costs since the inception of the revitalization levy on January 1, 2015, offset by incremental tax levy in the revitalization area. After recording annual surpluses in 2019 and 2020, the CRL is anticipated to run annual deficits in 2022 through 2026.

In 2031, the CRL reserve is projected to reach a positive position. By the end of 2031 (no change from previous projection) the CRL program will have offset prior year shortfalls accumulated in the reserve if no further capital spending is approved.

In 2034 (versus previous projection of 2033) the CRL reserve is projected to accumulate sufficient funds to cover the remaining debt servicing costs. This means that starting in 2034, the tax lift excluding the education tax is forecasted to be available to the general tax pool if no additional capital projects are funded.

4 Other Costs

Other costs include project office costs, an allowance for assessment appeal losses, and a \$2.53 million annual payment to cover arena borrowing costs originally intended to be funded by incremental parking revenues.

The Quarters Downtown Community Revitalization Levy - Financial Projections

Program Overview

City Council approved Bylaw 15800, "Schedule "A" - The Quarters Downtown Community Revitalization Levy Plan" on June 20, 2011. The Quarters CRL provides funding for investments in public infrastructure needed to attract private investment, redevelopment, and revitalization of the defined area. To date, Council has approved \$95 million in funding for The Quarters Phase I and Phase II capital projects.

The CRL enables the City to apply both the municipal and education tax levy increases related to the incremental assessed value over the baseline to pay debt servicing and other related infrastructure improvements. Annual program shortfalls will be transferred to the CRL reserve to be recovered through future CRL revenues.

The assessment baseline for the CRL was set on December 31, 2011. The Quarters CRL can remain in place for up to a maximum of 20 years from 2012 to 2031, unless the Province specifies an earlier date.

Financial Update:

This attachment includes three sections:

- 1) Current 20-year Revenue Projections** **Page 2**
Updated revenue projection, and how they compare to projections that were previously shared with Council.
- 2) Current Revenue Projections vs. Approved Expenditures** **Page 3**
A comparison of current revenue projection scenarios compared with expenditures related to approved CRL-funded projects.
Includes a description of assumptions used in developing the different revenue scenarios.
- 3) Detailed Budget Projections** **Page 5**
Updated year-by-year budget projections for The Quarters Downtown CRL, based on the Low Revenue Scenario.

Current 20-year Revenue Projections

This chart compares the revenue projections for The Quarters Downtown CRL at three points in time. As part of the approval process each of the CRL Plans was required to show low, medium, and high revenue Scenarios. Subsequent projections for The Quarters Downtown CRL have been based on Low Scenario assumptions.

Projected Revenue (\$millions)	Scenarios		
	High	Medium	Low
Current Projection			\$132
February 22, 2021 City Council Report UFCSD00222 Community Revitalization Levy Update - Downtown, The Quarters Downtown, Belvedere			\$156
Approved Quarters Downtown CRL Plan (June 2011)	\$150.5	\$143.5	\$139.5

Current Revenue Projections vs. Approved and Potential Expenditures

From 2012 to 2031 (entire life of The Quarters Downtown CRL)
(\$millions)

	Revenue Scenario LOW (Note 1)	Revenue Scenario STRESS TEST (Note 2)
Revenue		
CRL Revenue and Base Tax Levy	132	80
Expenses (Note 3)		
<u>Funded Project Costs</u>		
2012-2015 and 2015-2018 Capital Budget (Approved)	122	122
<u>Base CRL Operating Expenses</u>	26	26
Excess/(Deficient) CRL Revenue		
Only Funded Projects and Operating Expenses Included	(16)	(68)
<u>Unfunded Project Costs</u>		
No Capital Spending currently proposed	0	0
Excess/(Deficient) CRL Revenue		
All Projects, CRL Revenue or Costs	(16)	(68)

Notes:

- 1 Low Scenario Assumptions:
 Market Value Change:
 2022-25: -12 per cent cumulative to +7 per cent cumulative depending on property class
 2026-31: 3 per cent per year
 New Development:
 20 year development based on Colliers low scenario for new developments.
- 2 "Stress Test" Scenario Assumptions:
 Market Value Change:
 Same as Low Scenario
 New Development:
 Only buildings under construction are included.

- 3 Principal and Interest:
Expenses for funded and unfunded project costs include all principal and interest charges currently forecast to retire Quarters Downtown CRL debt used to finance Council-approved capital profiles, as well as any operating costs related directly to specific projects

The Quarters Downtown CRL - Detailed Budget Projection

(\$000)	Project Total	Actual 2012 to 2020	-----Projected-----			2024 to 2031
			2021	2022	2023	
Revenues						
Community Revitalization Levy (Note 1)	\$ 130,587	\$ 27,487	\$ 4,326	\$ 4,180	\$ 4,291	\$ 90,303
Base Tax Levy	\$ 500	500	-	-	-	-
Other Funding	\$ 1,286	1,286	-	-	-	-
Total Revenues	132,373	29,273	4,326	4,180	4,291	90,303
Expenditures						
Debt Servicing	\$ 122,352	23,771	5,395	5,844	8,310	79,032
Non-Capital Items	\$ 13,114	7,864	630	630	630	3,360
Other Costs	\$ 12,458	9,852	818	994	794	
Total Expenditures	147,924	41,487	6,843	7,468	9,734	82,392
Net Income (Loss)	(15,551)	(12,214)	(2,517)	(3,288)	(5,443)	7,911
Cumulative Net Income (Deficit), Beginning	-	-	(12,214)	(14,731)	(18,019)	(23,462)
Cumulative Net Income (Deficit), Reserve Balance	\$ (15,551)	\$ (12,214)	\$ (14,731)	\$ (18,019)	\$ (23,462)	\$ (15,551)
Previous Cumulative Net Income (Deficit), Reserve Balance (Note 2)		(12,212)	(14,878)	(17,782)	(20,988)	11,563
Net Change (Note 3)	-	\$ (2)	\$ 147	\$ (237)	\$ (2,474)	\$ (27,114)

Explanatory Notes:

- 1 Current Projection
 - The current projection for The Quarters Downtown has been revised to reflect current economic conditions and updated expenditure cash flows.
 - Community revitalization levy revenue decreased by \$25.1 million. The changes reflect updated assessment information and timing of private development projects.
 - The Quarters Downtown revenue projections are based on the Low Scenario.
- 2 Previous Projection
 - The previous projection reflects the projection included in the February 22, 2021 Council Report UFCSD00222, adjusted for actual results for the year ended December 31, 2020.
- 3 Net Change
 - From 2026 onwards (previous projection 2025) this program is projected to have an annual positive net position, which will be transferred to the CRL reserve if no further capital spending is approved.

Attachment 3

- This projection indicates that CRL revenues will not be sufficient to cover all outstanding principal and interest costs of the Quarters approved to date catalyst projects before expiry of the CRL in 2031. The shortfall is projected to be \$15.5 million. Ongoing municipal tax revenues that continue beyond 2031 would be used to retire the remaining debt by 2033, two years after the CRL ends.

Belvedere Community Revitalization Levy - Financial Projections

Program Overview

Belvedere CRL (Station Pointe) is financed through Borrowing Bylaw 14883 which was passed in 2008. This enabled the City to undertake up to \$34.25 million in infrastructure improvements and land development along Fort Road to promote Transit Oriented Development and to encourage private sector redevelopment in the area. In January 2012, Bylaw 15932 was passed to allow for the Belvedere Community Revitalization Levy to fund this project.

The CRL enables the City to apply both the municipal and education tax levy increases related to the incremental increase in the assessed value over the baseline to pay for the debt servicing and other related infrastructure improvements.

The assessment baseline for the CRL is December 31, 2012. The CRL can remain in place for up to a maximum of 20 years from 2013 to 2032, unless the Province specifies an earlier date.

In addition to the CRL funds, net proceeds from the sale of City-owned property within the CRL area will be used to fund the infrastructure improvements completed by the City.

Financial Update:

This attachment includes three sections:

- 1) Current 20-year Revenue Projections** **Page 2**
Updated revenue projection, and how they compare to projections that were previously shared with Council.
- 2) Current Revenue Projections vs. Approved Expenditures** **Page 3**
A comparison of current revenue projection scenarios compared with expenditures related to approved CRL-funded projects.
Includes a description of assumptions used in developing the different revenue scenarios.
- 3) Detailed Budget Projections** **Page 5**
Updated year-by-year budget projections for the Belvedere CRL, based on the Low Revenue Scenario.

Current 20-year Revenue Projections

This chart compares the revenue projections for the Belvedere CRL at three points in time. As part of the approval process each of the CRL Plans was required to show low, medium, and high revenue scenarios. Subsequent projections for the Belvedere CRL have been based on low scenario assumptions.

Projected Revenue (\$millions)	Scenarios		
	High	Medium	Low
Current Projection			\$46.4
February 22, 2021 City Council Report UFCSD00222 Community Revitalization Levy Update - Downtown, The Quarters Downtown, Belvedere			\$42.3
Approved Belvedere CRL Plan (January 2012)*	\$106.5	\$76.4	\$53.2

*Includes Land Sales **and** CRL Revenue

Current Revenue Projections vs. Approved and Potential Expenditures

From 2013 to 2032 (entire life of Belvedere CRL)
(\$millions)

	Revenue Scenario LOW (Note 1)	Revenue Scenario STRESS TEST (Note 2)
Revenue		
CRL Revenue & Land Sales	46.4	40.7
Expenses (Note 3)		
<u>Funded Project Costs</u>		
2005-2015 Capital Budgets (Approved)	53.0	53.0
<u>Base CRL Operating Expenses</u>	1.5	1.5
Excess/(Deficient) CRL Revenue (Note 7)		
Only Funded Projects and Operating Expenses Included	(8.1)	(13.8)
<u>Unfunded Project Costs</u>		
Project is complete	0	0
Excess/(Deficient) CRL Revenue		
All Projects, CRL Revenue or Costs	(8.1)	(13.8)

Explanatory Notes:

- Low Scenario Assumptions:
 Market Value Change:
 2022-2025: -12 per cent cumulative to +2 per cent cumulative
 depending on property class
 2026-2032: 3 per cent per year
 New Development:
 Includes buildings under construction plus \$11 million of future
 residential development.
- "Stress Test" Scenario Assumptions:
 Market Value Change:
 Same as Low Scenario
 New Development:
 Only buildings currently under construction are included.
- Principal and Interest:
 Expenses for funded and unfunded project costs include all principal and
 interest charges currently forecast to retire Belvedere CRL debt used to

Attachment 4

finance Council-approved capital profiles, as well as any operating costs related directly to specific projects.

Belvedere CRL - Detailed Budget Projection

(\$000)	Project Total	Actual 2013 to 2020	Projected			2024 to 2032
			2021	2022	2023	
Revenues						
Land Sales (Note 1)	\$ 16,256	\$ 5,556	\$ -	\$ 4,190	\$ 2,650	\$ 3,860
Tax Levy CRL Revenue (Note 1)	30,097	6,199	1,121	1,571	1,540	19,666
Total Revenues	46,353	11,755	1,121	5,761	4,190	23,526
Expenditures						
Cost Of Land Sold	12,053	3,610	-	4,549	1,952	1,942
Debt Servicing	40,938	18,491	2,072	2,250	2,250	15,874
Other Costs	1,478	679	30	30	12	727
Total Expenditures	54,469	22,780	2,102	6,829	4,214	18,543
Net Income (Loss)	(8,116)	(11,025)	(981)	(1,068)	(24)	4,983
Cumulative Net Income (Deficit), Beginning	-		(11,025)	(12,006)	(13,074)	(13,098)
Cumulative Net Income (Deficit), Reserve Balance	\$ (8,116)	\$ (11,025)	\$ (12,006)	\$ (13,074)	\$ (13,098)	\$ (8,116)
Previous Cumulative Net Income (Deficit), Reserve Balance (Note 2)	-	(10,902)	(11,851)	(11,181)	(12,580)	(11,899)
Net Change (Note 3)	-	\$ (123)	\$ (155)	\$ (1,893)	\$ (518)	\$ 3,783

Explanatory Notes:

- Current Projection

The current projection for Belvedere has been revised to reflect current economic conditions and updated expenditure cash flows. Community Revitalization Levy Revenue has been increased by \$4.0 million based on improving valuations of rental residential developments.
- Previous Projection

The previous projection reflects the projection included in the February 22, 2021 Council Report UFCSD00222, adjusted for actual results for the year ended December 31, 2020.
- Net Change

From 2029 onwards (no change from previous projection) this program is projected to have an annual positive net position, which will be transferred to the CRL reserve if no further capital spending is approved. The projections indicate revenues from the Community Revitalization Levy and land sales will be insufficient to cover all outstanding principal and interest charges before the 2032 expiry of the Levy. Ongoing municipal tax revenues that continue beyond 2032 would retire the remaining debt by 2036. Previously, projections indicated that the CRL reserve would accumulate sufficient funds to cover the remaining debt servicing costs in 2038.



Urban Planning and Economy
UPE00880

Edmonton

**Community Revitalization Levy
Update - Downtown, Quarters,
Belvedere**

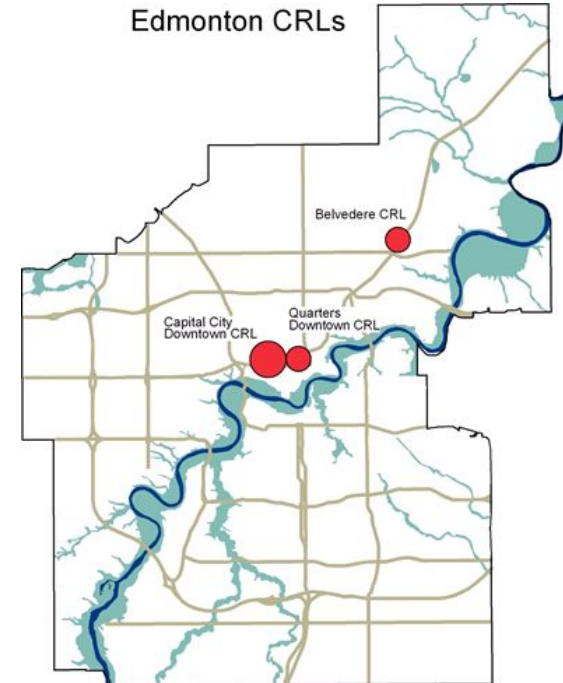
City Council
February 22, 2022

Community Revitalization Levy Areas in Edmonton

**Capital City Downtown:
2015-2034**

**The Quarters Downtown:
2012-2031**

**Belvedere:
2013-2032**



The City Plan Implementation Approach



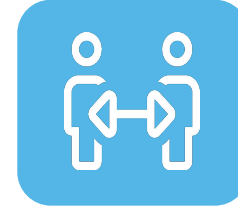
Planning, Policy & Regulation



Process & Service Delivery



Data & Measurement



People, Partnerships & Change Management

Examples

- District Planning
- City Planning Framework
- Zoning Bylaw Renewal

- Prioritized budgeting
- Business planning
- Operational service delivery

- Measures and targets
- Transparent reporting

- Organizational change management
- External relationships and partnership

CRL Update: Capital City Downtown

Capital City Downtown: Amended Bylaw

- Bylaw 19820 to amend the Capital City Downtown CRL Plan approved by City Council at Public Hearing on August 31, 2021.
- Approved by Provincial Order-in-Council on January 26, 2022.

Capital City Downtown: Catalyst Projects

Complete:

- Rogers Place and associated infrastructure
- Alex Decoteau Park

Partially Complete:

- Stormwater Drainage Servicing

In Progress:

- Warehouse Park
- Jasper Avenue New Vision
- Green and Walkable Downtown
- Centennial Plaza (Projects in the Civic Precinct)
- McDougall Hill Bridge (River Valley Promenades)
- 103A Avenue Pedway

Capital City Downtown: What's Driving the Projection?

- Pace and volume of new developments
- Weakness across multiple property classes (exacerbated by COVID-19)
- CRL Revenue overall is stable



Capital City Downtown CRL

Revenue Scenarios (\$ millions)

2015-2034

	HIGH (\$M)	MEDIUM (\$M)	LOW (\$M)
Current	\$882	\$764	\$704
Q1 2021	\$825	\$754	\$710
Original (2013)	\$1,156	\$941	\$597

CRL Update: The Quarters Downtown



Edmonton

The Quarters Downtown

Revenue Scenarios (\$ millions)

2012-2031

	HIGH (\$M)	MEDIUM (\$M)	LOW (\$M)
Current			\$132
<i>Q1 2021</i>			<i>\$156</i>
<i>Original (2011)</i>	<i>\$150.5</i>	<i>\$143.5</i>	<i>\$139.5</i>

CRL Update: Belvedere



Belvedere

Revenue Scenarios (\$ millions)

2013-2032

*Includes Land Sales **and** CRL Revenue*

	HIGH (\$M)	MEDIUM (\$M)	LOW (\$M)
Current			\$46.4
<i>Q1 2021</i>			<i>\$42.3</i>
<i>Original (2012)</i>	<i>\$106.5</i>	<i>\$76.2</i>	<i>\$53.2</i>

Thank You.

City Council
February 22, 2022

Edmonton

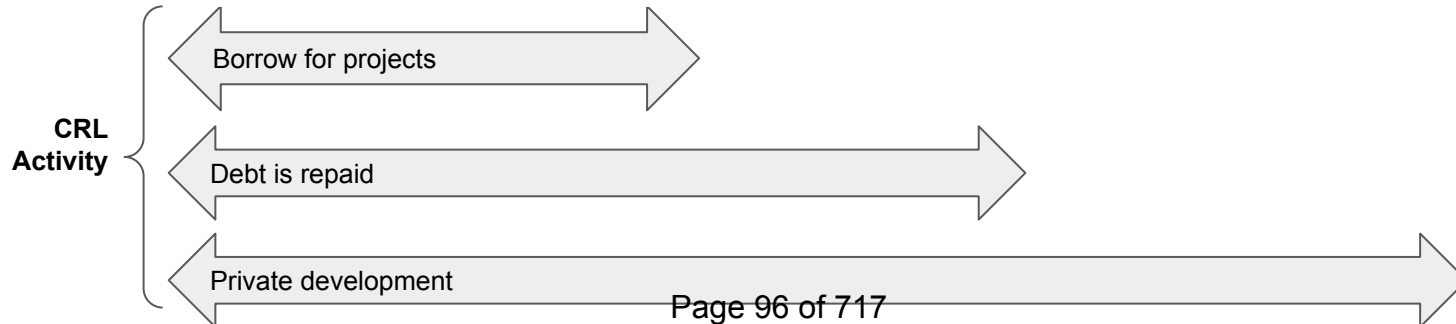
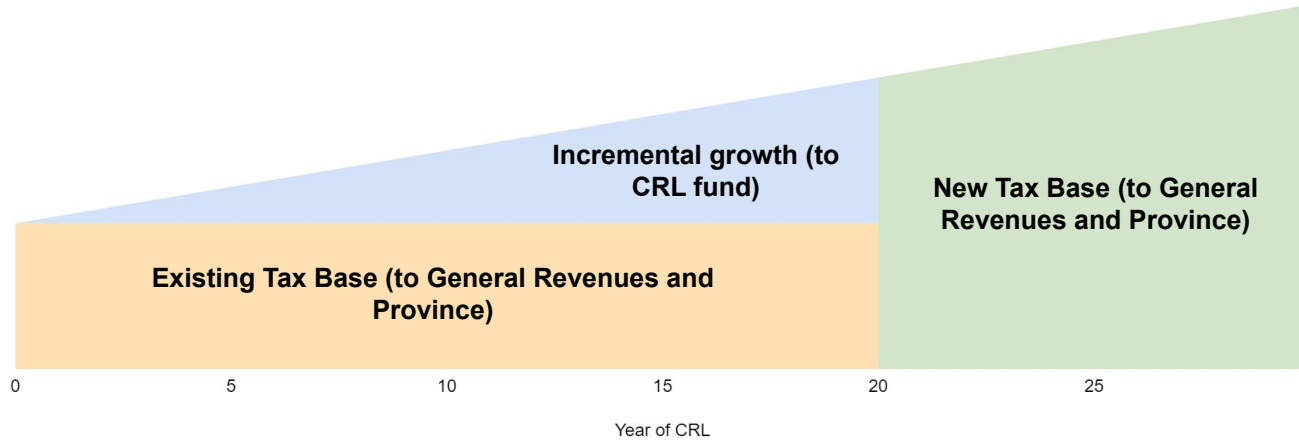
About Community Revitalization Levies

Community Revitalization Levies

- Use of CRL funds are established in a CRL Bylaw
- A municipality is authorized to pass a CRL Bylaw when the Province approves a CRL Regulation
- A CRL Bylaw is approved by City Council at a Public Hearing
- CRL Bylaw must also be approved by the Province

Community Revitalization Levies

Basic CRL Model



Community Revitalization Levies

- Use of CRL funds must be:
 - ◆ Consistent with the CRL Plan
 - ◆ Located within the CRL Area
 - ◆ Approved by City Council (Budget)

Capital City Downtown

20-year Revenue

	HIGH	MEDIUM	LOW	STRESS TEST
Funds Sufficient to cover all approved costs	YES	YES	NO	NO
Future Revenue for unfunded projects	\$ 166 M	\$ 48 M	Nil	Nil

High-level cost estimate for all remaining projects: \$146 million

ENTERPRISE COMMONS STATUS UPDATE

Budget, Scope and Timeline Pressures

RECOMMENDATION

1. That the budget adjustment for capital profile "19-18-1904 - Enterprise Systems Transformation Program", as outlined in Attachment 3 of the February 22, 2022, Financial and Corporate Services report FCS01050, be approved.
2. That Attachments 2 and 3 of the February 22, 2022, Financial and Corporate Services report FCS01050, remain private pursuant to sections 24 (advice from officials) and 25 (disclosure harmful to economic and other interests of a public body) of the *Freedom of Information and Protection of Privacy Act*.

Report Purpose

Council decision required

Council is being asked to approve an increase in funding to facilitate Enterprise Commons implementation as a priority in support of ongoing enterprise systems transformation.

Executive Summary

- The Enterprise Systems Transformation Program (ESTP) is a major project for the City of Edmonton that will integrate business applications that support the areas of finance, human resources, and supply chain into a unified software application. These business applications will come together into a single Enterprise Resource Planning software to create what is referred to internally as Enterprise Commons.
- In June 2019, Executive Committee provided approval for work to begin on planning of an ESTP in June 2019 and committed \$30 million of the overall \$63.5 million of approved funding. During the 2020 Spring Capital Budget Adjustment, the remaining \$33.5 million of the original project budget was allocated to the project.
- By the end of 2021, \$36.2 million has been spent, while \$23.3 million is allocated to future system integration and other contractual obligations.

ENTERPRISE COMMONS STATUS UPDATE

- Administration is forecasting a shortfall and is seeking additional funding, as outlined in Attachment 3, to cover a revised project schedule that is proposed to shift the expected launch date into Q4 2022, along with additional risk mitigation strategies.

REPORT

The Enterprise Systems Transformation Program (ESTP) represents a major corporate shift to integrate processes and technology for the core business functions of finance, human resources and supply chain management . Enterprise systems are large technology applications that support business processes, information flows, financial reporting and data analytics in complex organizations.

With the implementation of the SAP cloud solutions, the current programs of PeopleSoft, SAP Enterprise Central Component and other separate customized systems are planned to be decommissioned. Many of these existing systems are reaching the end of their technology lifecycle — this means that for many of the City's critical systems, the vendors will cease providing the necessary updates and support to keep the systems operational. At its June 10, 2019 meeting, Executive Committee considered these items and approved the release of \$30 million in funds held in abeyance to commence this work (CR_6894rev Enterprise Systems Transformation Program - Project Delivery and Business Case). At that time, the cost of the ESTP was estimated to be \$63.9 million. The business case previously provided to Executive Committee to support this estimate is included as Attachment 1.

By adopting the SAP Cloud Platform as its primary enterprise solution, the City made a future-focused investment to better respond to changing needs and adapt to new technologies. The SAP Cloud Platform is expected to increase efficiency, process large amounts of data from connected systems and improve data-driven decision-making. The solution supports the City's outcome of ensuring that technology and data are leveraged to enable quality decision-making and enhance innovative service delivery for residents and employees.

At the May 25, 2020 City Council meeting, Administration provided the Financial and Corporate Services report CR_7504, Enterprise Systems Transformation Program - Update. The report, about the program now referred to corporately as Enterprise Commons, explained that the initial phase of the project was anticipated to run from 2020 to 2022. The report outlined the implementation of cloud-based programs of SAP S/4HANA and SAP SuccessFactors, along with an integration of SAP Ariba, to migrate finance, human resources and supply chain business processes.

After concluding procurement activities, Administration entered into a contract with a systems integration partner, Deloitte LLP, who provided expertise that informed an updated estimate for the remaining costs required to deliver the 2020-2022 phases of the project. As part of the 2020 Spring Capital Budget Adjustment process, Council approved the reallocation of \$33.5 million of funding from CM-18-1514 Technology Implementation to the project, bringing the total funding to \$63.5 million to support the implementation of the enterprise systems implementation for finance, human resources and supply chain business processes. These funds were identified for

ENTERPRISE COMMONS STATUS UPDATE

internal and external project staff time, systems integration services and SAP Cloud Platform costs.

Since that funding approval, Administration has been working with the systems integration partner to implement the business transformation. Work completed to date includes:

- identification of business requirements
- majority of design and configuration required to facilitate the new working environment
- multiple rounds of system integration testing
- commencement of change management activities
- preparation for training activities

While significant progress has been made in implementation, the large project scope and the City's complexity, along with partners in the Edmonton Police Service and Edmonton Public Library, each with their own unique needs, have resulted in challenges navigating, designing and configuring the complex requirements across all the varied services. Complex functionality has also made it challenging to identify certain essential business requirements until advanced phases of the project, impacting ESTP budget and scope.

While Administration has simplified existing business processes to align with industry standard best practices, the City also has unique requirements (such as collective agreements or pension requirements) and practical considerations related to the functionality of its systems that limit simplification of some functions. Another complication to achieving the original project launch date has been the COVID-19 pandemic. Project team members for both the City and the systems integrator, have been required to work remotely over much of the project, and at times been unavailable due to medical absences. Details of negotiations to address some of the project pressures are found in Attachment 2 (Private).

In consideration of the factors above, Administration recommends the additional funding so that the project launch date can be postponed to Q4 2022 to provide for extended system integration testing cycles, increased preparation time and additional risk mitigation activities. While the schedule and budget impact is not ideal, the additional integration testing will ensure increased quality and reduce the risk of failure when Enterprise Commons launches.

Budget/Financial Implications

Recommended budget amendments and associated financial implications are outlined in private Attachment 3. Financial implications for Edmonton Police Services and Edmonton Public Library are not included in the figures presented.

\$63.5 million of funding to implement Enterprise Commons has been approved for the implementation of enterprise software solutions for human resources, finance and supply chain components. Of the approved funding, \$36.2 million has been spent through the end of 2021. A further \$23.3 million is committed to future system integration and other contractual obligations. The remainder of the approved budget, approximately \$4 million, is forecasted to be insufficient for the revised launch date of Enterprise Commons recommended at this time.

ENTERPRISE COMMONS STATUS UPDATE

The revised launch date will result in additional licensing costs in 2022 and 2023 as a result of the licenses for both the legacy system and new licenses within the Open City and Technology Branch's operating budget, which are expected to cause budget variance. Ongoing licensing costs, estimated to increase from the current legacy license costs by \$3.75 million, are funded in the approved Fall 2021 Supplemental Operating Budget Adjustment. Administration continues to work to optimize licensing requirements, however this initial estimate is subject to change due to variables that include new license purchasing requirements, growth, and future decisions.

COMMUNITY INSIGHT

The supporting programs, processes, information and services being modernized in the Enterprise Systems Transformation Program improve the City's capabilities, knowledge and skills to provide services to Edmontonians and employees. This important "back of house" work supports the City in meeting the evolving needs of the people it serves.

GBA+

An enterprise system brings valuable automation that will free up employee time to focus on providing even better service to citizens. Standardized processes will help streamline work and create efficiencies and an integrated system will enable the City to further digitize citizen service and communications channels.

Key areas and opportunities to address equity for all age groups, abilities and diverse demographics include:

1. Accessibility: ensure accessibility requirements for people with disabilities; accessibility is considered at each stage of the project design.
2. Useability: consider how the system improves the useability for employees.
3. Equity: systems remove the likelihood of bias that may occur in manual processes; centralized data supports easy reporting on hiring results to assess our equity results against targets.

As the project transitions, GBA+ will be applied to ensure applications are inclusive, decisions are evidence-based, work is effective and the process contributes to equality of outcomes.

ENTERPRISE COMMONS STATUS UPDATE

RISK ASSESSMENT

Risk Category	Risk Description	Likelihood	Impact	Risk Score (with current mitigations)	Current Mitigations	Potential Future Mitigations
If recommendation is not approved						
Governance - Failure to implement project successfully	An incomplete system will need to be launched on an accelerated timeline. If the system does not function as expected, there may be additional costs to mitigate those issues.	5 - likely	4 - severe	20 - high	- all current budget is committed, compressed project timelines as much as possible - critical cut off dates and risks for existing applications are known (peoplesoft);	- accelerate the project and launch the system in an unfinished state - reduce scope of project and cut non-essential modules from release
Public Sphere - Risk of damage to City's reputation	City employees or external organizations may not be paid, leading to damaged relationships and detrimental reputational damage to the City as a large employer	5 - likely	4 - severe	20 - high	- add additional pay comparisons between existing data and new system data - additional testing cycles	- only launch modules essential to critical functions - prepare communications plan to respond internally to employees, council, and public

ATTACHMENTS

1. ESTP Business Case
2. Deloitte Negotiation Details (Private)
3. Budget Motion (Private)

Enterprise Systems Transformation Program Business Case

Edmonton

March 2019

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1 Executive Summary

The City of Edmonton (City) is a \$3 billion corporation serving nearly one million residents, with 73 programs and services. We keep people safe. We keep people moving. We make Edmonton a great place to live, work and play. As the City of Edmonton continues to experience rapid, multi-faceted change as a result of the larger social, economic, political and technical influences in our environment, we are tasked with providing an increasing array of services in a more open, adaptable, responsive and fiscally responsible way.¹

However, the City's ability to deliver on **Council's Vision 2050** and to efficiently meet the evolving needs of Edmontonians is significantly impacted by its aged and disconnected enterprise technology systems. These systems and associated processes were first designed and implemented in the 1990s to support the City's core functions (mainly Finance, Human Resources, and Corporate Procurement & Supply Services (CPSS)). At this time, organizations customized software to meet current business processes instead of adapting processes to meet the software's workflow.

Since the 1990s, enterprise systems have evolved. In particular, cloud technology has led many organizations to adopt leading practice and adapt processes to standardize business processes, thereby making software upgrades much less complex and mitigating overall organizational risk.

As the City has grown and the services it delivers have evolved, new business requirements have been addressed by adding additional software and increasing customization within the aging technology, leading to an increasingly complex technology environment that is not agile or adaptable to the changing needs of the organization.

In order to deliver on the increasingly complex and evolving needs of the City, it is crucial that this work realize numerous qualitative benefits that will transform our corporate financial, human resources and supply chain processes to enable the Council's Vision 2050, as outlined below:



¹ This is Who We Are

Additional qualitative benefits that the City can realize through this Enterprise Systems Transformation Program (ESTP) include:

- **Increased Opportunities for Innovation** - By digitizing core technology functions the City can take advantage of disruptive technology innovations such as Robotics and Blockchain;
- **Automated Service Delivery for Citizens** - An integrated core enterprise system will enable the City to further digitize citizen service and communications channels;
- **Enhanced Capabilities in Information Management** - ESTP will improve information management and enhance data and analytic capabilities;
- **Increased Data Transparency and Real-Time Visibility** - Accurate, real-time data and analytics will enable informed, actionable decision making by City leadership;
- **Improved Operational Efficiencies** - Significant operational efficiencies can be achieved through process standardization and access to accurate, real-time transactional data;
- **Enhanced Scenario Analysis and Forecasting** - An integrated enterprise system will enhance planning and analysis across departments by improving the ability to predict outcomes through real time scenario analysis and embedded predictive forecasting tools;
- **Integrated Data Reconciliation & Report Generation** - Integrated data management will simplify the City's data landscape, significantly cutting down reconciliation and report generation overhead;
- **Improved Oversight of Internal Controls** - Implementing best practice mechanisms, rules and procedures to promote accountability, ensure the integrity of information, and improve operational efficiency;
- **Enhanced Fraud Prevention & Detection** - Improving consistency, control and traceability by identifying patterns that indicate fraud or other concerns;
- **Improved Segregation of Duties (SoD)** - Implementing a single, integrated system with a defined SOD model will improve the City's ability to exclude potential violations and conflicts across systems and processes; and
- **Increased Data Security Controls** - Cloud, integrated ERP solution designs include robust security controls to protect employee and citizen data.

The following constraints require the City to modernize the current processes and technology:

- Meeting citizen demands for increased digital engagement, multi-channel service delivery, transparency, data openness, and a smart city cannot be effectively achieved using our current systems;
- Increasing risks of cyber-attacks increase the imperative to transition sensitive citizen and employee data from fragile, inconsistently controlled platforms into robust, secure systems; and
- Some of the software currently used by the City is no longer supported by the vendor; for example, SAP Business Suite will no longer be supported by 2025. Therefore, it is not a matter of 'if', but 'when' and 'how' the move to a sustainable technology platform will take place. These critical issues are becoming progressively impactful, and the City is exposed to reputational risks if these issues cannot be mitigated effectively.

To arrive at a recommendation for addressing the issues outlined in this business case, the following options were thoroughly evaluated:

- **Option 1 - Status Quo:** The City continues with 'business as usual' approach and maintains disparate core Enterprise Resource Planning(ERP) applications;
- **Option 2 - Core Homogeneous ERP:** The City implements a single modernized ERP solution that spans across the City's core enterprise functions;

- **Option 3 - SAP Cloud First:** The City implements a single modernized SAP Cloud ERP solution that spans across the City's core enterprise functions; and
- **Option 4 - Best of Breed:** The City implements 'best of breed' ERP solutions for each of the City's core enterprise functions.

Based on findings from the assessment of the four above described options in conjunction with strategic, financial and risk factors, the business case makes the following three recommendations:

- **Transforming the City's Core ERP Functions:**

The business case recommends Option 2 - The Selection and Implementation of a Core Homogeneous Cloud ERP Solution that spans the City's core functions such as Finance, HR, and CPSS, while standardizing processes based on technology and industry standards.

Implementing a single, core homogeneous ERP will result in the lowest Total Cost of Ownership (TCO) over ten years (TCO - \$296.6M), when compared to the costs of maintaining status quo (TCO - \$314.6M) and to the costs of implementing a best of breed solution (TCO - \$310.6M).

- **Transforming the City's Enterprise Asset Management Functions:**

As core functions move towards a single core homogeneous ERP, other functions within the City (such as Real Estate, Fleet Services and Facility Management) have an opportunity to rationalize the City's Asset Management technology landscape utilizing the selected core homogenous ERP. Administration recommends undertaking a detailed assessment to identify these rationalization opportunities.

- **Transforming the City's Workflow Management:**

There is a need to rationalize the processes and technologies in business functions that utilize POSSE as an enterprise delivery and workflow management system to streamline processes and lower the costs of managing the platform. The business case recommends performing a detailed assessment and rationalization of the City's POSSE platform.

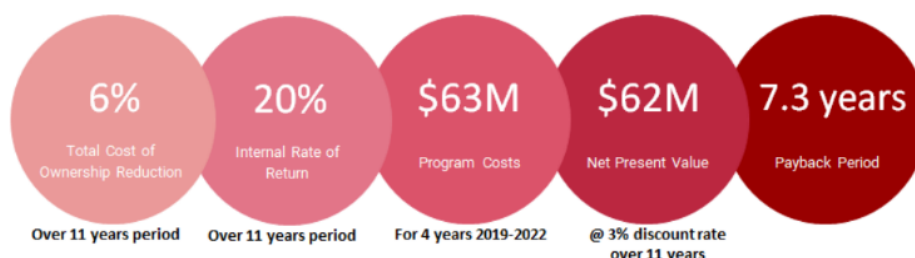
As preparation for the program continues, the City will continue to further investigate Option 3 - SAP Cloud First due to the following factors:

- Reduced Risk Profile and Solution Complexity;
 - reduced technology integration risk by integrating new SAP products to the City's existing SAP platforms (such as inherent, out-of-the-box integrations with the Ariba platform that the City is implementing)
 - existing City resource expertise with SAP, both on the business and technology fronts
 - extensive market expertise and tools developed for transformations from legacy to modern, cloud based SAP platforms
- Lowest Total Cost of Ownership - Option 3 - SAP Cloud First has the lowest overall total cost of ownership out of all four options; and
- Shortest Time to Value² - Option 3 - SAP Cloud First has the shortest time to value out of all four options due to the shorter upfront procurement cycle.

² Time to Value (TTV) is the amount of time it takes to realize value from an investment

With a conservative costs and benefits analysis, the overall Enterprise Systems Transformation Program (ESTP) transformation recommended by this business case is based on a financial return to the City that includes a 6 percent reduction in Total Cost of Ownership (TCO), a 20 percent Internal Rate of Return (IRR), 74.5 percent Return on Investment (RoI), and a Net Present Value (NPV) of \$62.2M (for a conservative sensitivity scenario).

To properly implement a modernized suite of enterprise systems, it is estimated that the costs for ESTP program implementation are \$62.7M over the next four years and a cumulative total of \$119.8M over a period of 11 years including implementation and sustainment³. The payback period is estimated to be 7.3 years. The program will deliver total net benefits of \$89.2M, including benefits from process efficiency (\$71.7M) and total cost of ownership reduction of \$17.5M (6 percent) resulting from reduced technology ownership costs through lowered licensing, maintenance and support costs.



The summary of costs and benefits for the period from 2019-2029 can be found below:

Value Summary												
Year	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	Total
Program Benefits	\$0.0M	\$0.0M	\$0.6M	\$3.6M	\$14.1M	\$25.8M	\$30.2M	\$33.0M	\$33.1M	\$34.7M	\$34.0M	\$209.1M
Harvestable Benefits	\$0.0M	\$0.0M	\$0.6M	\$2.2M	\$8.3M	\$14.1M	\$13.7M	\$13.3M	\$12.1M	\$12.9M	\$11.4M	\$88.5M
Non-Harvestable Benefits	\$0.0M	\$0.0M	\$0.0M	\$1.5M	\$5.8M	\$11.8M	\$16.5M	\$19.7M	\$21.0M	\$21.8M	\$22.6M	\$120.5M
Program Costs	\$2.6M	\$7.1M	\$27.8M	\$25.2M	\$5.4M	\$5.5M	\$8.7M	\$8.9M	\$9.3M	\$9.5M	\$9.7M	\$119.8M
Net Benefits	-\$2.6M	-\$7.1M	-\$27.2M	-\$21.6M	\$8.7M	\$20.3M	\$21.4M	\$24.1M	\$23.8M	\$25.1M	\$24.2M	\$89.2M

Administration recommends that the ESTP program be approved and initiated without delay. This will prevent the City from making further redundant or siloed technology investments in near end-of-life platforms, technologies or processes that need to be replaced, thereby reducing the risk of lost or stranded technology investments. Once the program is approved, next steps will be to commence the technology procurement cycle, followed by a three-year program that includes technology implementation and process standardization initiatives. Delays due to long procurement cycles will impact the roadmap timelines, program costs and benefits. Once the implementation and rollouts are completed, Administration will use a benefits realization framework to validate benefits on an annual basis.

³ Sustainment costs include costs for software licensing and vendor support, ERP internal support center, future enhancement projects, and ongoing personnel training.

2 Background

2.1 Strategic Context

The City is embarking on its journey to transform technology and processes. It has set a vision for technology as an enabler of a more nimble, transparent government that responds to the needs of its citizens and employees. The City is pursuing multiple programs such as Data Governance, Corporate Security, and the Enterprise Systems Transformation Program (ESTP) in support of the Business Technology Strategy (BTS) and to better utilize its digital tools and drive value and efficiencies for citizens and businesses.

The ESTP Business Case identifies key system and process transformation initiatives to drive value for citizens and businesses. It also identifies and assesses key ERP transformation options along with recommendations tied to cost and benefit evaluations. The recommended roadmap establishes the foundation to achieve the City's goals of providing open and transparent government to citizens by standardizing processes and modernizing currently disparate systems while supporting data governance and corporate security initiatives. This roadmap will allow the City to deliver on Council's Vision 2050 and on following strategic priorities as identified in BTS and Council's Vision 2050:

- Enhance citizen centricity of its services.
- Digitize government management and operations.
- Enable City of Edmonton to become a smarter city.
- Deliver data-driven governance for citizens and employees.

This business case considers public sector, municipality and technology leading practices in providing up-to-date, dependable insights to inform the decision to invest in a modern, standardized and cloud based technology environment.

2.2 Trends and Jurisdictional Scan

Trends across citizen expectations, technology advancements and government regulations are changing the way public sector organizations manage their services and operate to deliver value for citizens and employees. Key trends relevant to this business case are highlighted below and have been used to inform ESTP's recommended initiatives.

2.2.1 Citizen and business centric services

Aligning services, decisions and policies with the citizen's point of view is critical for any public sector organization's success. This imperative applies to citizen-facing departments and enterprise-level core branches that provide the foundational data that inform citizen service delivery and corporate decision making.

Many governments today have the tools to simplify complicated processes for citizens and can provide digital capabilities to deliver personalized, self-managed, and insightful online services to citizens and businesses.

For instance, there are many examples of citizen service automation, from e-signatures, web payment of fees and taxes, digital permits and licensing services, as well as digital justice and case enforcement. In order to effectively deliver such services, the City needs to transition to a modern technology platform that enables the incorporation of more digital micro services.

2.2.2 Digital government management and operations

As costs for managing legacy systems interwoven with complex processes become unsustainable and impede growth, governments are examining ways to become more efficient and optimize their operating costs while enhancing the citizen experience through digitization. This can be attained by interconnecting all aspects of the value chain in real time via integrated core systems. This approach allows decision makers and employees to see the complete picture at any point in time instead of glimpses into isolated data points within specific systems or organizational units. By implementing tightly integrated systems to support core City functions, City leaders and employees will have access to insights that position them to identify, predict, and address issues to improve the effectiveness and efficiency for all involved.

2.2.3 Becoming a Smart City

A smart, sustainable city uses innovative and industry leading technologies to improve quality of life, efficiency of urban operations and services, and competitiveness, while ensuring that it meets the economic, social and environmental needs of present and future generations. All orders of government are seeking opportunities to improve efficiencies, enhance citizen experience and optimize costs through becoming smarter. Innovative technologies such as smart systems, predictive analytics, blockchain, cloud computing, artificial intelligence, and Information Technology (IT) - Operations Technology (OT) integrations are being used to optimize core operations, transportation, infrastructure, sustainability, citizen empowerment, safety, and livability. These technologies enable the vision of becoming a Smart City. Some examples are:

- IT-OT integration for fleet optimization and fuel management solutions;
- Sensors to monitor asset utilization and health, and predict maintenance needs;
- Real-time analytics to inform policy and decision making;
- Predictive modeling and simulation to help keep citizens safe through real-time situational awareness; and
- Adoption of cloud platforms to support scalability and adopt to changing citizen needs.

ESTP program and roadmap will enable the City to become a smarter City by setting up technology, business process, security and data foundations.

2.2.4 Data-driven governance

In an effort to resolve policy issues and enhance citizen services through real-time analytics and intelligence, public sector organizations are moving towards consolidating data sources, identifying sources of truth and eliminating data and functional silos. Governments in numerous countries, such as Australia and New Zealand, are moving towards data-driven digital government by consolidating operational data within their ERPs.

2.2.5 Emphasis on Data Security is Critical

Governments collect and track critical citizen data, and the volume of this information will only grow in the future. In light of the increased risk of cyber-attack incidents, it is critical to protect data, increase transparency about cybersecurity measures, and reassure citizens that their data is secure to build trust and encourage continued citizen engagement.

It is critical that organizations manage this data effectively within robust, modern enterprise systems, and that this data is governed by appropriate lifecycle management policies.

2.2.6 Disruptive Technology Trends

Public sector organizations are transitioning to standardized, tightly integrated, cloud-based Enterprise Systems as the platforms to support their operations. The following technology trends driving such transformations are central to the value of these platforms and provide important context for this business case:

- Significant reduction in technology customizations supporting those processes to increase organizational change resilience, with some functionality trade-offs;
- Technology Integration layers (integration software) embedded within a holistic technology architecture facilitate better ongoing collaboration between modular and standard technology needs of organizations;
- Increased agility in the deployment of technology with growth of cloud models; and
- Increased access to growing sets of organizational and operational data to enable predictive analytics and data driven decision making, and to effectively support Artificial Intelligence (AI).

Modern day ERPs support the direction set by these trends for any public sector organization.

Administration conducted a jurisdictional scan on the direction of public sector organizations in Canada and the US to support this business case. The details of this jurisdictional scan can be found in [Appendix A – Jurisdictional Scan](#).

2.3 Current State Organizational Capability Model

Administration developed a high-level map identifying the systems and applications currently supporting enterprise capabilities at the City of Edmonton .. Key observations from this analysis are:

- Core enterprise functions at the City are supported by a large number of systems. This has resulted in increased technical and functional complexity and limited systems integration across functions; and
- Numerous business functions and capabilities within the City are being supported by multiple, concurrent systems, as indicated by the color legend in Figure 1. This has significant impacts on data integrity and transparency, and on the consistency of processes.

Based on the above observations, this business case proposes a recommended future state and roadmap to guide the City's transition to a simplified, integrated and standardized technology ecosystem.

Capabilities shown in white in Figure 1 are not currently supported by any of the core enterprise systems or major feeder applications.

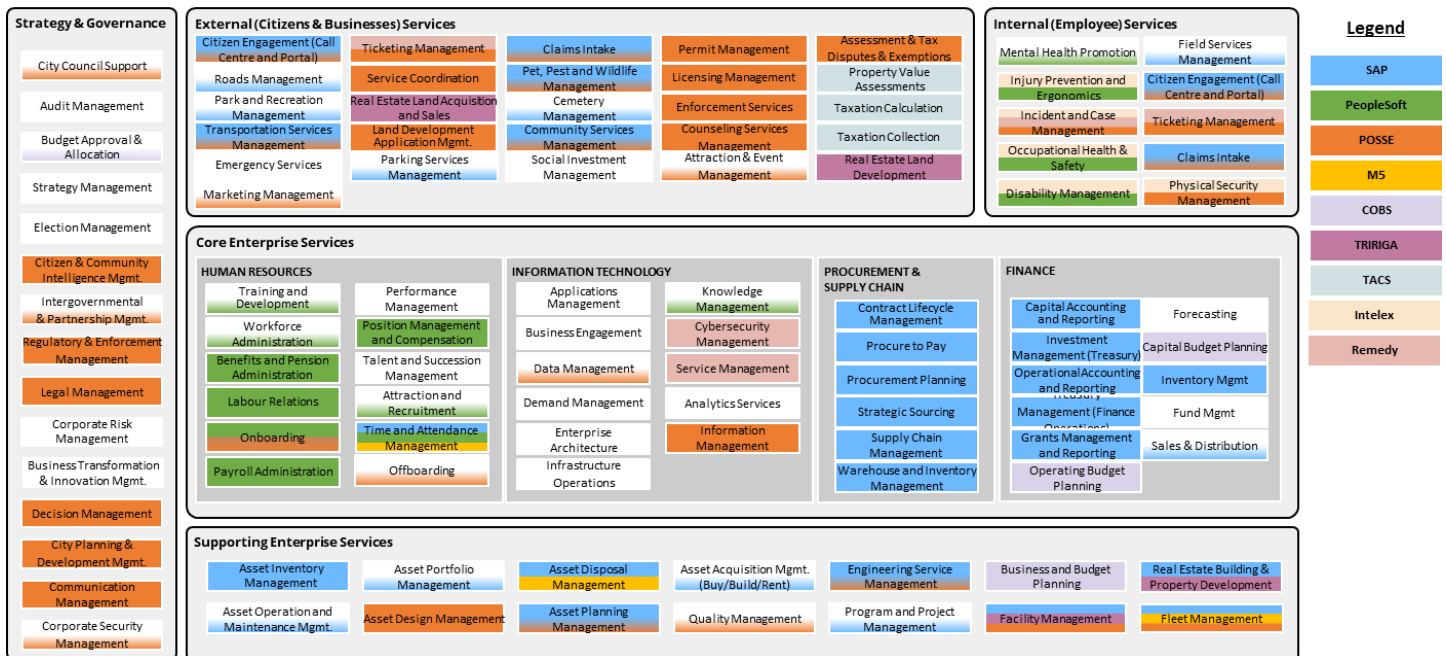


Figure 1: Current state capability map with technology overlay

3 Business Case Approach

The approach used to develop this business case focused on three primary goals: first, understanding the future vision of the City, its employees and citizens; next, understanding current state from a macro lens; and finally, assessing findings against technology trends across public sector organizations.

This business case approach brought together branches from across the City to discuss a comprehensive view of the future vision of enterprise systems at the City. These discussions were followed by an analysis of future state options from high level architectural, financial, logistical, organizational readiness and functional requirements perspectives.

The business case was developed in three phases: the assessment phase, the design and build phase, and the review and present phase. Figure 2 provides an overview of this approach:

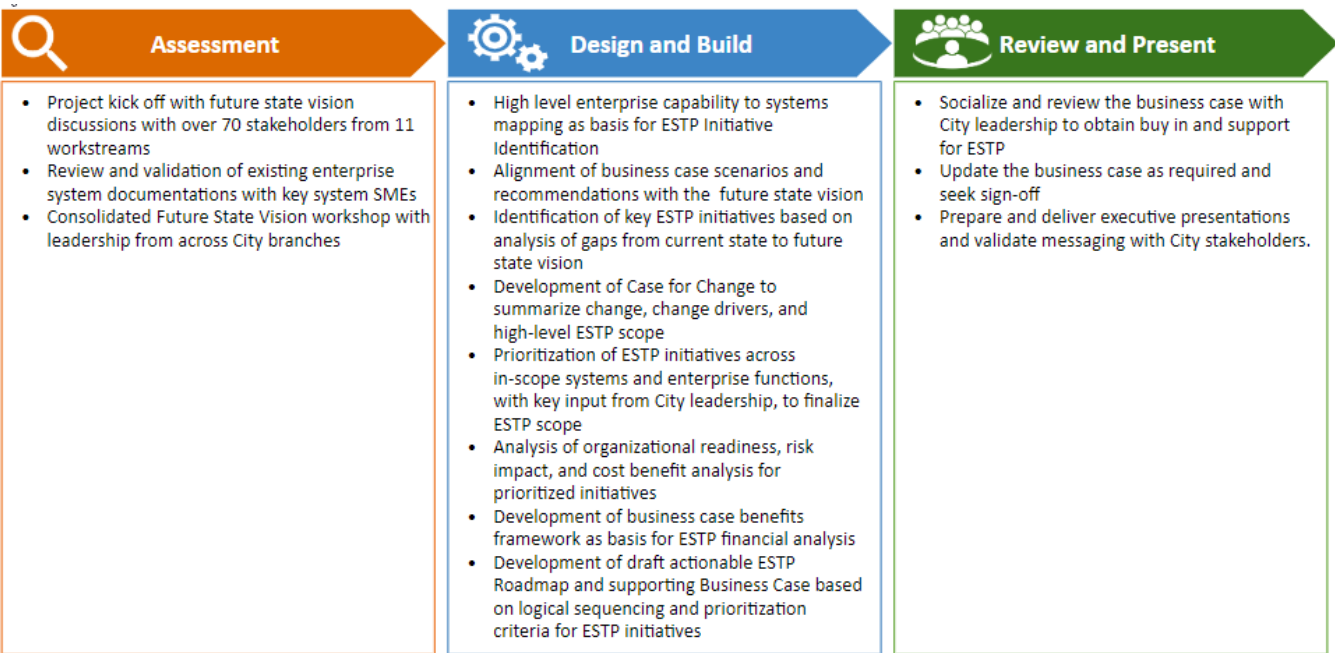


Figure 2: ESTP business case approach

4 Case for Change

In addition to multiple internal and external factors influencing the City to transform its processes and technology, there are significant opportunities that can be realized through the ESTP program. Once realized, these opportunities bring the City closer to implementing its Business Technology Strategy.

4.1 Opportunities for transformative change

This assessment has identified opportunities to realize benefits by implementing an enterprise systems transformation at the City. These opportunities are based on internal and external factors that strengthen the case for transformative change.

Internal factors include:

- Low level of process standardization;
- Weak cross-functional collaboration;
- Legacy technology landscape with disparate, disjointed and out-of-support systems;
- Data integrity issues across systems;
- Process governance concerns; and
- Low employee satisfaction with technology used to support business functions.

External factors include:

- Citizen expectations for cost efficient delivery of services and processes;
- Increased citizen expectations for transparency and open data;
- Need to secure citizen and employee data against cyber threats;
- Rapidly changing regulatory environment;
- Evolution of enterprise systems providing industry best practices out of the box for business processes;
- Increased expectations to move towards a digitized, multi-channel service delivery model; and
- Enhanced citizen engagement through innovative technologies such as Artificial Intelligence (AI).

The table below summarizes ESTP opportunities based on the internal and external factors described above, their mapping to the internal drivers of change identified in the City's Business Technology Strategy, and descriptions of the opportunities and benefits that can be realized from each of those opportunities.

ESTP Opportunity	City's Drivers of Change (based on BTS)	Description of Opportunity and Resulting Benefits
Enhanced citizen experience through cross-functional collaboration	Organizational Efficiency	The City can encourage cross-functional collaboration among branches through defined process and system governance. Cross-functional collaboration among branches will reduce process inefficiencies and enhance citizens' experience with the City services (better collaboration will reduce response time, and reduce errors in service delivery). This will encourage collaborative decision making, reduce technology redundancy across branches and focus investments.

ESTP Opportunity	City's Drivers of Change (based on BTS)	Description of Opportunity and Resulting Benefits
Process standardization and optimization opportunities	Transparent Processes	The City has the opportunity to optimize and standardize its business processes in alignment with industry standards that are driven by technology transformation. Standardized processes allow for higher levels of transparency and encourage greater integration among branches. This is aligned with Council's Vision 2050 of providing a transparent government.
Improved Oversight of Internal Controls	Organizational Efficiency	The City has an opportunity to implement standard mechanisms, rules and workflows to enhance internal controls, enforce consistency and promote accountability across the corporation. Implementing a single, integrated system with a defined SOD model will improve the City's ability to exclude potential violations and conflicts across systems and processes, and will allow the use of fraud prevention and detection tools.
Standardized and defined project governance	Organizational Efficiency	The City has an opportunity to define project management and governance standards to support and encourage standardization of project delivery and reporting processes. This will improve leadership reporting and enhance transparency in tracking project delivery, thereby increasing efficiency in project spending.
Efficient processes through automation	Organizational Efficiency	The City can increase process automation by using innovative technologies that reduce redundant activities. Process automation will increase employee efficiency and reduce time spent on unnecessary manual work. Process standardization sets the foundation for process automation through technologies including Robotics Process Automation (RPA) and Artificial Intelligence (AI).
Managed enterprise systems portfolio	Focused Investments	The City has an opportunity to consolidate and rationalize its currently disparate enterprise systems portfolio through a defined and integrated vision of its ERPs. This will improve the management and support of its entire application landscape and reduce the costs for system management and keep its enterprise systems portfolio aligned with business needs. It will also keep the City's technology investments in line with its BTS vision of having an integrated, corporate-wide approach towards technology investments and decision making.
Informed decision making	Informed Leadership	<p>Improved data management and governance across systems and processes will provide accurate and timely information to the City's leadership and allow for informed decision making.</p> <p>The City's data currently resides across multiple enterprise systems with minimal data governance and lifecycle management, resulting in limited and untimely access to corporate-wide data for leadership and staff. For instance, different organizational structures reside on SAP and PeopleSoft, often requiring manual effort to consolidate data.</p> <p>Improved governance and lifecycle management initiatives will support gathering of intelligent business insights through business intelligence and advanced analytics, allowing Council to better project the City's future growth trajectory. Governance and lifecycle management will also empower City leadership to effectively invest in the City's future initiatives and negotiate better collective bargaining terms for its employees.</p>
Safe citizen and employee data	Citizen Experience Expectations	As the City increases transparency across its processes, higher volumes of data will be available to citizens and businesses across multiple platforms (web and mobile). As this data becomes available, increased risks of cyber-attacks could expose the City to a variety of data breaches as well as legal and reputational risks. The new systems transformation will need to ensure that security policies and regulations for data governance are supported. Modern day enterprise systems support the majority of security and regulatory needs around data management, thereby complying with the security needs related to citizen and employee data.

ESTP Opportunity	City's Drivers of Change (based on BTS)	Description of Opportunity and Resulting Benefits
Tracking to budgets	Economic Development and Growth	Increasing efficiencies across people, processes and technology at the corporation is a significant area of focus for the City. Aligning processes with industry best practices and standards while managing data integrity across systems will allow the City to track and compare actual spending to the budget in real time, and to optimize operational spending. The proper tracking of actual to planned investments on the budget will enhance the quality of information available to the leadership and encourage informed decision making.
Cloud-based delivery models	Environmental Stewardship	Cloud-based delivery models are being increasingly leveraged by businesses and governments for their enterprise systems-based services. The City has the opportunity to leverage the cloud delivery model to realize the following benefits: <ul style="list-style-type: none"> • Ability to scale on demand as citizen and business needs change. • Better stewardship of funds from tax payers by reducing the cost of technology support over time. • Shift from capital costs to operational costs through cloud delivery. • Improved alignment with mobile strategy.
Digital citizens and workforce mobility	Citizen Experience Expectations	Process standardization and modern enterprise systems can support the objectives of setting up optimal data governance for the City. This will enhance data integrity and provide a foundation for service delivery through digital platforms such as web and mobile. In addition, process standardization and modern enterprise systems support the vision to provide a consistent experience to citizens and optimize and monitor service delivery costs across platforms.
Alignment with regulatory needs	Environmental Stewardship	As the City grows and citizen needs evolve, regulatory changes will require the City to be agile in its processes and operations to align with the changing regulatory environment (e.g. changes in building code regulations or changes to Collective Bargaining Agreements (CBAs)). The City has the opportunity to achieve a higher level of agility by setting up process controls and governance, and standardizing processes using technology.

4.2 Why Now?

These opportunities provide a rationale to undertake an enterprise systems transformation. In addition to these strategic drivers described in the previous section, some of the City's enterprise systems are nearing end of life and others are demonstrating significant sustainment costs, as described below.

4.2.1 Systems nearing end of lifecycle

Certain enterprise systems at the City are approaching the end of their functional lifecycle and need to be upgraded or replaced in the near term. Even if the City decides to stay with Status Quo, these systems require investments in upgrades or replacement, and the City will not realize the benefits of implementing a consolidated enterprise system. The table below provides details on the systems nearing end of life.

System	End of Vendor Support	End of 3rd Party Support	Implications
SAP Business Suite	2025	N/A	<ul style="list-style-type: none"> As the SAP Business Suite ceases to be supported by SAP, an SAP S/4HANA upgrade will be required for the multiple modules of SAP being used at the City by Finance, Asset Management, Real Estate, Facilities Management and Corporate Procurement and Supply Services branches, before 2025. This will necessitate investment into a significant upgrade by 2024. At that point, if the City chooses to stay on legacy SAP, it will likely face the following concerns: <ul style="list-style-type: none"> Run unsupported systems or, Purchase a cost prohibitive maintenance agreement Alternatively, if the City chooses to proceed with the upgrade, an automated and clear migration path from the current SAP version to S/4HANA does not exist due to different functional architectures for certain processes. As a result, a green-field implementation (that is, implementing a new system rather than upgrading the existing systems) with data migration may become the only option.
PeopleSoft	2017	2025	<ul style="list-style-type: none"> PeopleSoft upgrade will be required prior to 2025, thereby reducing the payback period for investments being made in the current system today. Upgrade to cloud may necessitate standardization of some processes, including administration of payroll, pension and benefits, in line with the City's multiple collective bargaining agreements. The PeopleSoft version currently utilized at the City went out of vendor (Oracle) support in 2017. Since then, the City's PeopleSoft version is on freeze (will not receive further upgrades) and is being supported by a third party. This state imposes increased risks to the City and is not sustainable in the long run. The most critical risks are specifically related to the inability to upgrade Peoplesoft to keep up with technical advancements and business demands.

4.2.2 Rising Total Cost of Ownership

Sustaining customized and legacy enterprise systems at the City and maintaining integrations between these and tertiary systems is increasing the Total Cost of Ownership (TCO) for the City. There is an immediate need to rationalize these systems to minimize cost overheads related to duplication of system functionalities, complex system integrations and the associated infrastructure and personnel costs.

Administration has forecasted the future Total Cost of Ownership for each of the City's enterprise systems (SAP, PeopleSoft, and POSSE) based on trends in historical spending on these systems and has concluded that costs will rise significantly in the future due to the following factors:

- Increasing architectural complexity due to multiple ad-hoc and point integrations. In other words, the complexity of the City's enterprise system landscape will continue to increase with the pressing need to connect disparate systems using inconsistent methods;
- Increase in costs to sustain systems that are nearing end of life such as PeopleSoft and the Learning Management System(LMS);
- Increasing costs to manage and further customize systems to meet business needs due to non-standard processes; and

- Costs of necessary upgrades to SAP and PeopleSoft due to the end of vendor support for the versions being used at the City of Edmonton.

5 Scope Definition of ESTP

ESTP is a holistic and integrated approach to developing a modern enterprise technology platform that will support the City in providing complex, citizen-focused services. To this end, the business case promotes the following foundational concepts:

- **Simplify** how the City works;
- **Radically standardize** systems and align processes accordingly;
- Set target state to reflect **industry leading practices** for all dimensions of this transformation; and
- Focus on solutions with **minimal customization** to reduce the costs of upgrading, maintaining and supporting enterprise systems.

5.1 Key Considerations for ESTP

The City's leadership identified key the following considerations to inform the business case roadmap and initiatives:



Figure 4: Key considerations for the ESTP program

5.2 ESTP Scope

ESTP capabilities will be addressed in the program’s roadmap initiatives through the procurement, configuration and roll out phases of a core homogeneous ERP. The majority of these capabilities are currently supported by SAP, PeopleSoft, POSSE, and tertiary integrated systems such as Visier, Taleo, Cority, InteleX, M5 and Tririga.

Figure 5 below shows core capabilities and business functions that are in-scope for the ESTP transformation. **In-scope** capabilities will be directly addressed by the core ERP modernization initiatives. **To be assessed** capabilities, such as Enterprise Asset Management (EAM) and POSSE, need further assessment in order to be consolidated into the application landscape.

Out of scope capabilities and functions, such as Customer Relationship Management (CRM), Enterprise Information Management (EIM), Cybersecurity, etc, will not be included in ESTP’s roadmap.

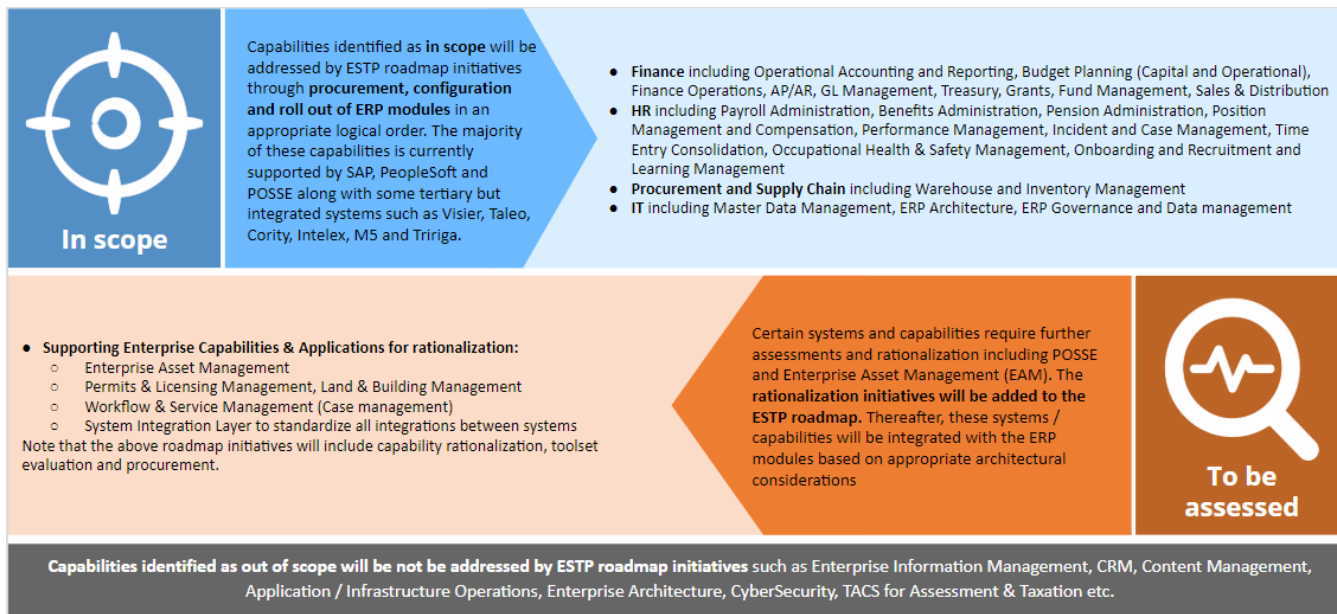


Figure 5: ESTP Program Scope

5.2.1 ESTP Scope Definition by Functional Capabilities

As part of the business case assessment, Administration developed a capability model for all Branches to define the scope of the ESTP:

- Capabilities highlighted as in-scope will be delivered through Core ESTP initiatives;
- Capabilities highlighted in orange are the capabilities that will require further assessment to identify their current technology landscape fit and the best means of integration in to the new architecture. These include:
 - Enterprise Workflow Management system (workflows currently in POSSE that are truly enterprise workflows);
 - POSSE Permits and Licensing (for land and building management workflows); and
 - Enterprise Asset Management (EAM) to rationalize asset management applications at the City.
- Capabilities that are not highlighted will not be included in the scope for the program.

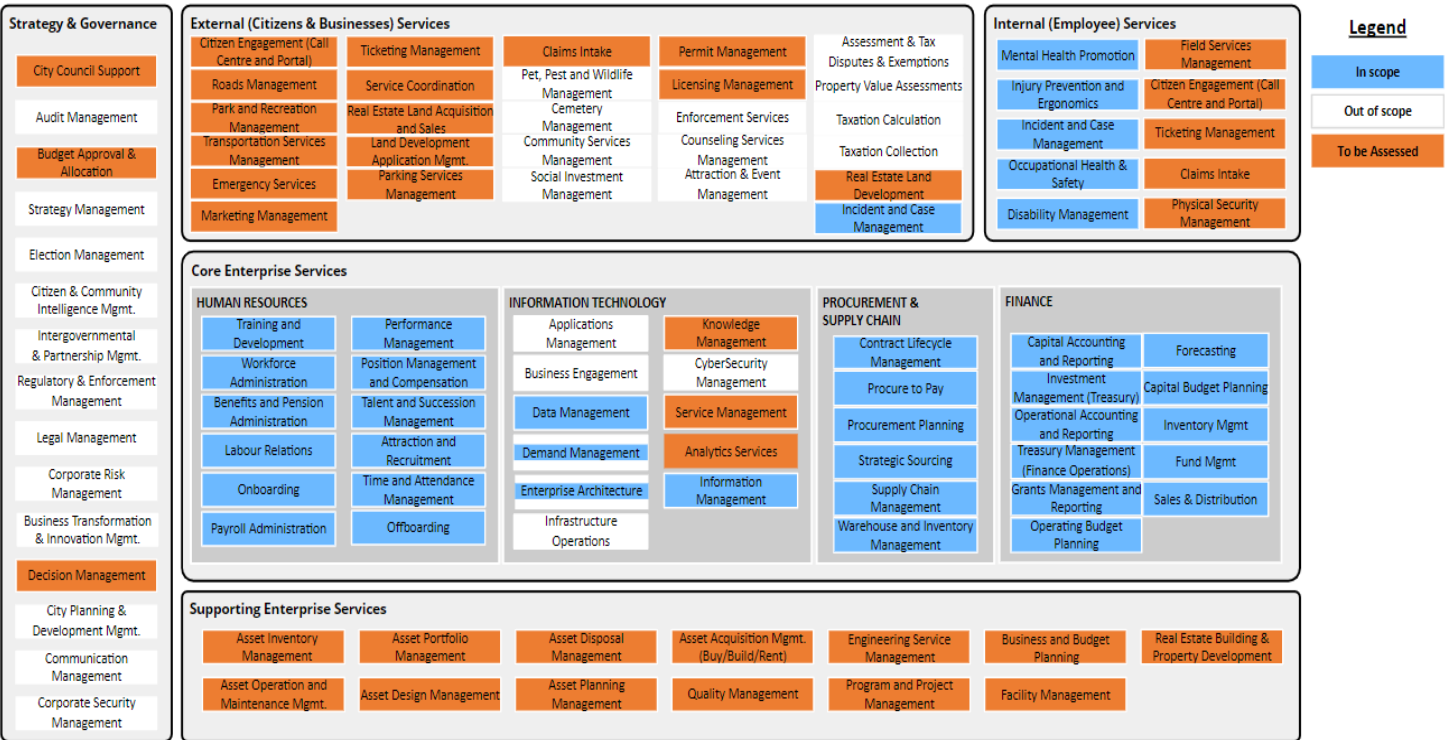


Figure 6: High Level Future State Mapping of ESTP Scope

6 Guiding Principles and Evaluation Criteria

The following guiding principles were identified by the City as the critical evaluation criteria for the options considered by this business case.

Alignment to City Goals	<p>Alignment of the options being considered to the City's goals and the BTS guidelines of providing innovative, integrated, citizen-focused solutions. The solutions should allow for focused investments that support City leadership in making informed decisions and empower citizens by providing the right information at the right time.</p> <p>The solution options will be evaluated for alignment with the goals of the BTS and City Council's Vision 2050.</p>
Total Cost of Ownership	<p>The Total Cost of Ownership (TCO) will be estimated by performing an analysis of the direct and indirect costs associated with each solution option and will include ESTP program implementation and sustainment costs. Total costs for the enterprise systems will be rationalized while providing value to the citizens.</p> <p>Along with the TCO, the assessment also looks at costs for implementing and sustaining each of the options and potential realizable benefits associated with each option.</p>
Enabling Adoption of Emerging Technologies	Evaluating the solution options that help the City be better prepared for emerging technologies. Such solutions will set up a foundation for future technologies such as RPA and AI as well as align with the future needs of a Smart City.
Solution Complexity	Each solution's complexity with respect to architecture, implementation, integration and sustainment will be evaluated. Options that present lower solution complexity will be ranked higher.
Solution Risk Profile	The options will be evaluated using a risk assessment. Options with a lower risk profile (taking into account mitigation and avoidance plans) will be selected. Any remaining risks will have mitigation plans to minimize impacts on City services and citizen experience.
Impact of Organizational Readiness	Organizational readiness will be assessed to gauge the options that are most aligned with organizational needs and culture. Options with lower organizational readiness implications for the City will be ranked higher.
Time to Value	A time-to-value assessment will show the duration to implement each option while considering potential constraints such as availability of resources to support the option.

7 ESTP Business Case Options

7.1 Options Overview

The City evaluated four transformation options for this business case. This section provides a description and analysis of each option based on the evaluation criteria outlined in the **Guiding Principles and Evaluation Criteria** section. A summary of the relative strength of all four options under each evaluation criterion is found in section 7.2.

	Option 1: Status Quo	Option 2: Core Homogenous ERP	Option 3: SAP Cloud First	Option 4: Best of Breed
Description	The City continues with 'business as usual' and maintains current disparate ERP systems. Capital and operational spending on Status Quo continues as-is and no benefits are realized for citizens or City employees.	The City implements a single consolidated ERP solution that spans across the City's core enterprise functions including HR, Finance and Supply Chain. In addition, integration points with EAM and POSSE will be considered.	The City implements an SAP Cloud ERP solution that spans across the City's core enterprise functions, leveraging available procurement alternatives to execute. In addition, integration points with EAM and POSSE will be considered.	The City implements the 'best of breed' ERP solution for each of the City's core enterprise functions including HR, Finance and Supply Chain. Procurement processes will be needed to evaluate 'best of breed' systems for each business function at the City.

7.2 Business Case Options Assessment

Each of the business case options was evaluated against all identified evaluation criteria as outlined in the following table. For the purpose of fair comparison, the study period for each of the options has been harmonized to ten years *from the start of implementation*; for SAP Cloud First option, this period is from 2019 - 2028. For the Core Homogeneous and Best of Breed options, this period is from 2019 - 2029 due to longer procurement cycles. For the Status Quo option, this period is from 2019 - 2029 to perform a fair comparison with the other options.

The assessment shows that if the City decides to stay with the Status Quo, it will continue to perpetuate process inefficiencies, necessitate further customizations, increase risk and continue to incur a high total cost of ownership.

	Option 1: Status Quo	Option 2: Core Homogenous ERP	Option 3: SAP Cloud First	Option 4: Best of Breed
Alignment to the City's goals	<ul style="list-style-type: none"> • Poorly aligned with the City's goals of having focused investments and enabling integration and collaboration across the City. • Does not invest in any transformative technologies. • Technology support costs will increase in the future due to mandatory upgrades required for PeopleSoft and SAP and a deferred spend in 2022-2024. 	<ul style="list-style-type: none"> • Aligns with goal to establish focused investments into a modern, cloud based enterprise system that consolidates multiple core functions in the City under the same technology platform. • Aligns with the City's vision to provide integrated and collaborative environment among branches. • Aligns with ongoing initiatives at the City such as "Program and Service Review", "Urban Form Business Transformation" and "EPM". 	<ul style="list-style-type: none"> • Provides benefits that are similar to those of the core homogeneous ERP option with a shorter time to value if procurement can be bypassed. 	<ul style="list-style-type: none"> • Best alignment with the City's goals by providing the best technology support core functions and enhancing citizen experience. • Provides best future state support with investments in innovative technology for each of the core functions. • This option will not have short time to value because it will require long procurement cycles for each technology solution.

	Option 1: Status Quo	Option 2: Core Homogenous ERP	Option 3: SAP Cloud First	Option 4: Best of Breed
Total Cost of Ownership	\$314.1M	\$296.6M	\$264.9M	\$310.6M
Enabling Adoption of Emerging Technologies	<ul style="list-style-type: none"> Does not set a foundation for emerging technologies such as Analytics, RPA and AI. 	<ul style="list-style-type: none"> Sets a solid foundation for emerging technologies by providing accurate master data and establishing a modern, agile platform 	<ul style="list-style-type: none"> Sets a solid foundation by providing accurate master data for emerging technologies such as Analytics, RPA and AI, and establishing a modern, agile platform. 	<ul style="list-style-type: none"> Sets a foundation through multiple integrations by providing accurate master data for emerging technologies.
Solution Complexity	<ul style="list-style-type: none"> Status Quo solution is highly complex. Administration anticipates that the support of existing, highly customized and aging systems will become increasingly difficult. 	<ul style="list-style-type: none"> Solution will have medium / moderate complexity. While it impacts a breadth of City processes, technology architecture, sustainment and management processes, it will enable consolidation of business processes through an integrated and simplified technology landscape. 	<ul style="list-style-type: none"> Solution will have medium / moderate complexity. While it impacts a breadth of City processes, technology architecture, sustainment and management processes, it will consolidate business processes through an integrated and simplified technology landscape. 	<ul style="list-style-type: none"> Solution will have high complexity. Technology architecture is more complex and requires multiple integrations and higher level of governance and management to oversee a more diverse application portfolio.
Solution Risk Profile	<ul style="list-style-type: none"> Solution has the highest risk profile. The current state neither meets evolving business needs nor provides sufficient value to the citizens. 	<ul style="list-style-type: none"> Solution has relatively lower risk profile as it moves the City away from Status Quo, provides value for residents through standardization and sets a foundation for future innovation. 	<ul style="list-style-type: none"> Solution has a relatively lower risk profile as it moves the City away from Status Quo, provides value for residents through standardization, and sets a foundation for future innovation. 	<ul style="list-style-type: none"> Solution has a relatively high risk profile. It resolves current state issues but also creates complexity around managing and negotiating multiple vendor contracts, makes the application portfolio more complex to sustain and manage financially and architecturally.
Impact of Organizational Readiness	<ul style="list-style-type: none"> No impact to the City and no organizational readiness required in short-term; however, mandatory upgrades to technology will require readiness and change management in the longer-term. 	<ul style="list-style-type: none"> High-level of impact to the City; the solution will only be successful if the organization adopts it. A great level of effort will be required for change management and training. 	<ul style="list-style-type: none"> High-level of impact to the City; the solution will only be successful if the organization adopts it. A great level of effort will be required for change management and training. 	<ul style="list-style-type: none"> High-level of impact to the City; the solution will only be successful if the organization adopts it. A great level of effort will be required for change management and training.

	Option 1: Status Quo	Option 2: Core Homogenous ERP	Option 3: SAP Cloud First	Option 4: Best of Breed
Time to Value	<ul style="list-style-type: none"> No value is achieved for citizens by retaining the status quo The City's ROI from investments into Status Quo processes and technologies will continue to decline due to increasing architectural complexity 	<ul style="list-style-type: none"> Medium time to value. While the City will reap the benefits of a consolidated technology landscape and standardized processes, more time will be needed to address procurement requirements. 	<ul style="list-style-type: none"> Assuming the procurement cycle can be bypassed, this option provides the shortest time to value. 	<ul style="list-style-type: none"> Longest time to value as procurement will be needed for multiple technology platforms.
Internal Rate of Return	Nil	20 percent	20 percent	18 percent

	Option 1: Status Quo	Option 2: Core Homogenous ERP	Option 3: SAP Cloud First	Option 4: Best of Breed
Program Benefits	Nil	\$209.1M	\$204.2M	\$210.2M
Program Implementation and Sustainment	N/A	\$119.8M	\$118.4M	\$133.8M
Implementation	N/A	\$53.9M	\$53.1M	\$54.0M
Sustainment	N/A	\$65.9M	\$65.3M	\$79.8M
Payback Period	N/A	7.3 years	6.5 years	7.6 years

7.3 Recommendation

The business case makes the following three recommendations for the enterprise process and technology transformation:

1. **Transforming the City's Core Functions through Enterprise Systems Transformation:**

Based on findings from the assessment of all four options and the associated strategic, financial and risk factors, summarized in section 7.2, the business case recommends Option 2 - The Selection and Implementation of a Core Homogeneous Cloud ERP Solution that spans the City's core functions such as Finance, HR, CPSS etc., while radically standardizing processes based on technology and industry standards.

Until procurement requirements are clarified and the recommendation is updated, the current recommendation is to select, procure and implement a Core Homogeneous ERP. This approach will provide the following benefits to the City:

- Modernize the City's technology environment with a cutting-edge solution that provides innovative functional capabilities, better cross-department integration, and robust tools to manage and utilize data;
- Enhance information security controls, with increased protection of critical citizen and employee data;
- Meet the vast majority of the City's requirements for selecting a leading ERP that will hit the requirements of radical standardization, data integrity, cloud security and breadth of functionality; and
- Reduce the Total Cost of Ownership (TCO) by transitioning into a single, core homogeneous and integrated enterprise system (TCO - \$296.6M) when compared to status quo (TCO - \$314.6M) or to that of a best of breed solution (TCO - \$310.6M). This reduction is due to:
 - Management of single vs. multiple system vendor contracts.
 - Reduction in technology management and maintenance costs as a result of less integration, fewer systems and more easily managed upgrades.
 - Optimization of resources through increase in process efficiencies and reduction in service delivery timelines.

However, the TCO associated with Option 2 - Core Homogeneous ERP is higher than that of Option 3 - SAP Cloud First due to the increased duration and additional effort required for additional procurement cycles.

2. **Transforming the City's Enterprise Asset Management through Enterprise Systems Transformation:**

As core functions move towards a single core homogeneous ERP, other branches within the City (such as Real Estate, Fleet Services and Facilities Management) have an opportunity to rationalize⁴ their technology landscape. The branches in question currently use multiple technology platforms such as SAP, M5 and TRIRIGA to manage and deliver their services. Some of these systems can be rationalized through the selected core homogeneous ERP and, hence, deliver an integrated solution for these branches. A detailed assessment is required and recommended to identify these rationalization opportunities.

3. **Transforming the City's Workflow Management through POSSE Transformation:**

There is a need to rationalize the processes and technologies in business functions that utilize POSSE as an enterprise delivery and workflow management system in order to lower the costs for managing the platform. To meet these needs, the business case recommends that a detailed assessment and rationalization of the City's POSSE platform be undertaken.

The full benefits of the business case will be realized when POSSE and EAM platforms have also been standardized to align with industry best practices. Since the scope of this business case includes a high level analysis of these platforms, Administration recommends performing further detailed assessments of both POSSE and EAM in order to produce a detailed future state vision and roadmap for each of them.

The overall ESTP transformation recommendation supported by this business case is based on a very strong financial return to the City with *Total Cost of Ownership (TCO) reduction of 6 percent, Internal Rate of Return (IRR) at 20 percent, Return on Investment (RoI) of 74.5 percent and Net Present Value (NPV) of \$62.2 million (for a conservative sensitivity scenario). Detailed financial analysis is provided in Appendix J of this document.*

⁴ Application Rationalization is the practice of strategically identifying business applications across an organization to determine which applications should be kept, replaced, retired or consolidated. The goal is to achieve improvement to business operations along with reducing the total cost of ownership

8 ESTP Program Definition

8.1 ESTP High-Level Roadmap and Implementation Plan

The ESTP program roadmap identified and defines the initiatives that need to be executed to implement Option 2 - Core Homogeneous System, over a period of four years (2019 - 2022).

Initiatives have been grouped into five main streams:

1. **ERP Core Initiatives** - This stream outlines the core initiatives required for the process and technology transformation of the core business functions, including HR, Finance and Supply Chain Services at the City. Identified initiatives will enable radical process standardization and technology transformation for the core business functions.
2. **ERP Ancillary Initiatives** - This stream identifies ancillary initiatives to support core initiatives during execution as well as for sustainment and benefit realization once the core initiatives have been executed.
3. **EAM Rationalization and Rollout** - This stream will include initiatives to assess and rationalize the Enterprise Asset Management (EAM) technology landscape. It will also execute concurrent initiatives to radically standardize EAM processes and align them to the industry leading practices using EAM technology transformation as a driver.
4. **POSSE Modernization** - This stream will include initiatives to assess and select a Workflow Management System (WMS) for niche services such as permits and licensing, pets and wildlife management etc. It will further look at rationalizing the current POSSE platform into the selected WMS by migrating prioritized POSSE workflows to the new WMS. Process standardization for these workflows and business process areas will be completed concurrently with the implementation of these workflows in the new WMS.
5. **Communication and Change Management** - This stream outlines communication and change management initiatives to ensure the success of the ESTP program. As the above mentioned streams are delivered, managing communications and facilitating the adoption of these initiatives through a robust change management approach will be critical.

ESTP Roadmap

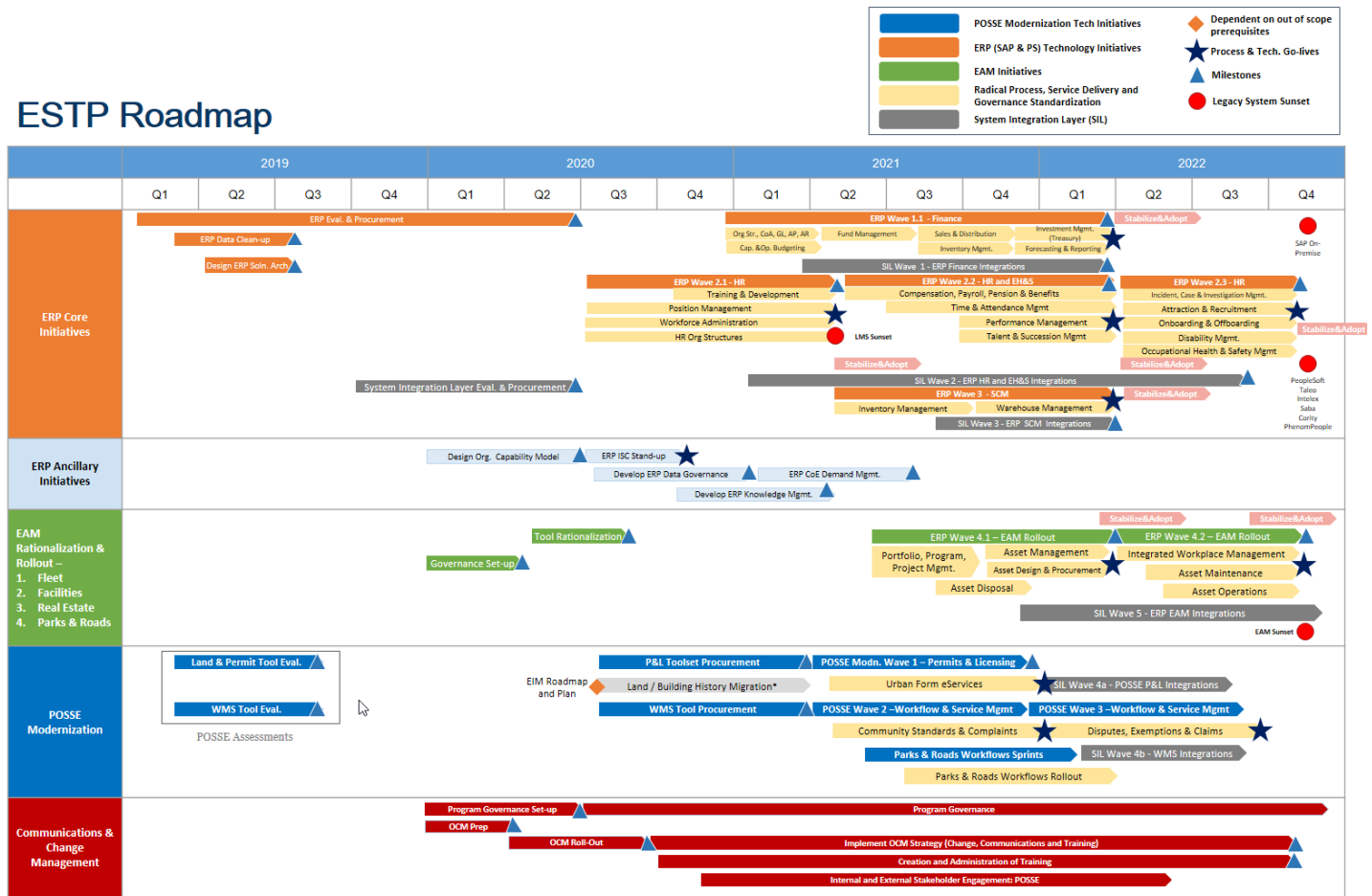


Figure 7: ESTP Roadmap - 2019 - 2022

The roadmap is based on an 18-month procurement timeline followed by a three year implementation period (2020 - 2022) in which the majority of the investment will be incurred. The implementation period will be followed by a seven year harvest period, where the benefits from the program will be realized (2023 - 2029).

The roadmap includes preparation, software selection, software implementation and stabilization, along with data cleansing and business process standardization for each of the core functions including Finance, HR and Supply Chain Management. It also outlines sunset / phase out milestones for the City's existing legacy systems, including PeopleSoft, SAP on premise, EAM, and other tertiary HR systems including Taleo, Cority, Intelex, PhenomPeople and Saba.

The initiatives have been prioritized and sequenced based on interdependencies among them, their relationship to ongoing initiatives at the City, and other assumptions highlighted in the Appendix B – ESTP Roadmap Prioritization Considerations. Some initiatives suggested for 2020 can be initiated in 2019, depending on funding and resources availability.

Each initiative identified on the roadmap has been described in a High-level Initiative Overview card in [Appendix E - High-level Initiative Overviews](#). Definitions include a description of the initiative and its dependencies, the estimated

duration, the cost to implement (+20 percent), and resource requirements (functional/process, technical, program management).

8.2 Initiative Overviews

8.2.1 ERP Core Initiatives

Per the roadmap, the following initiatives will be completed (with approximate timelines highlighted in parenthesis).

8.2.1.1 ERP Preparation Initiatives (January 2019 - June 2020)

ERP Preparation Initiatives include:

- **ERP Evaluation and Procurement** that will include an evaluation of various homogenous ERPs and selection of the solution that best fits the City's requirements. ERP requirements will be gathered from various corporate units (Finance, Human Resources & Employee Health and Safety, and Corporate Procurement and Supply Chain), and vendor solutions will be evaluated against those requirements. In addition, architectural and cost evaluations will be performed. Representation from the City of Edmonton's Law Branch, Corporate Information Governance Section and Corporate Information and Cyber Security Section will be closely involved starting with requirements definition and through the development and execution of vendor agreement contracts;
- **ERP Data Clean-up** (Master Data Management) that will include preparation and clean-up of existing ERP data to ensure that it is ready to be moved to the new ERP during implementation; and
- **ERP Solution Architecture Design** that will be required to define the structure and interactions of Cloud ERP and other feeder systems in the future state. This initiative will be guided by enterprise architecture and business considerations at the City.

8.2.1.2 ERP Implementation Initiatives (July 2020 - December 2022)

The future state ERP solution should be deployed in implementation waves that are described as follows:

- **ERP Finance Implementation Waves** in which Finance modules of the Cloud ERP (such as General Ledger, Sales and Distribution, Funds Management, etc.) will be configured, tested and deployed. Process standardization, data migration and service delivery and governance model design will occur in parallel for future state Finance capabilities (functions) outlined on the future state capabilities map in [section 5.2](#);
- **ERP Human Resources and Employee Health & Safety Implementation Waves** in which the Human Resources and Health and Safety modules of the Cloud ERP (Human Capital Management, and Employee Health and Safety modules) will be configured, tested and deployed. Process standardization, data migration and service delivery and governance model design will occur in parallel for future state Human Resources and Health and Safety capabilities (functions) at the City outlined in the future state capabilities map in [section 5.2](#);
- **ERP Supply Chain Implementation Waves** in which the Supply Chain modules of the Cloud ERP (Inventory and Warehouse Management) will be configured, tested and deployed. Process standardization, data migration and service delivery and governance model design will occur in parallel for future state CPSS capabilities (functions) outlined in [the future state capabilities map in section 5.2](#); and

- **Systems Integration Layer (SIL) Implementation Waves:** For each of the three implementation waves outlined above, integration waves to integrate the Cloud ERP solution to existing feeder systems (such as GIS, TRIRIGA, etc.) will be undertaken concurrently using the Systems Integration Layer.

8.2.2 ERP Ancillary Initiatives

ERP ancillary initiatives are not mandatory for the implementation of the ERP solution, but should be considered by the City as part of the Program in order to better support and sustain its Enterprise Systems:

- **Design Detailed Organizational Capability Model:** The current high level capability model would be developed in more detail during this initiative. This detailed capability analysis, although not necessary, would facilitate discussions on EAM Rationalization and POSSE Modernization initiatives;
- **ERP Internal Support Center Stand-up:** An ERP Internal Support Center would be designed, formalized and operationalized during this initiative. This ERP Internal Support Center would be comprised of business, technical and project resources; and the mandate for the Support Center, the roles required, its operating model and its organizational structure would be defined in this initiative;
- **ERP Demand Management:** This initiative would set-up a demand management process and mandate for the ERP platform specifying its intake process, demand prioritization mechanisms and demand process governance bodies;
- **Develop ERP Data Governance:** This initiative would define ERP master data management processes and policies as well as the governance structure around it; and
- **Develop ERP Knowledge Management (KM):** This initiative would define how knowledge (documentation) is managed in the ERP Internal Support Center. The initiative would define KM processes & workflows, tools, approval processes and governance structure(s).

8.2.3 Enterprise Asset Management (EAM) Rationalization Initiatives

The following initiatives will be completed as part of this stream (with approximate timelines highlighted in parenthesis).

8.2.3.1 EAM Rationalization Preparation Initiatives (January - August 2020)

EAM Rationalization Preparation Initiatives include:

- **EAM Governance Setup** will include designing, formalizing and operationalizing governance mechanisms for EAM between Real Estate, Fleet and Facilities, Parks & Roads business branches, and other branches at the City. The mandate for this governance body will be to make key decisions about EAM rationalization, data management and lifecycle, and to provide strategic direction for the development of an EAM strategy and roadmap for the City of Edmonton;
- **EAM Tool Rationalization** will include conducting detailed analysis across branches that use and provide asset management services (including Fleet & Facilities, Parks & Roads, and Real Estate) to provide the City with a recommendation on:
 - whether Operational / Capital Asset Management and Financial Asset Management capabilities should be managed by a separate system of record (i.e. IBM Tririga) with integrations developed with the Core Cloud ERP System; or
 - whether Operational / Capital Asset Management and Financial Asset Management capabilities should be moved into a module within the City's Core Cloud ERP, hence eliminating the need to

develop custom integrations (Note: The City should use the same system--either selected Cloud ERP or IBM Tririga--for both Financial and Operational / Capital Asset Management Capabilities to avoid confusion on the system of record for Asset Management); and

- Identify the best-fit system for Integrated Workplace Management (IWMS) capabilities.

8.2.3.2 EAM Rationalization Implementation Initiatives (July 2021 - December 2022)

The outcome of the EAM Rationalization Initiative will provide clarity on the future state solution for the EAM requirements at the City. The solution should be deployed in implementation waves that are described as follows:

- **EAM Implementation Wave 1 (ERP Wave 4.1)** in which technical modules will be implemented for Project and Portfolio Management (PPM); EAM Asset (Portfolio) Management, Asset Design and Procurement, and Asset Disposal. Process standardization, data migration and service delivery and governance model design will occur in parallel with capabilities (i.e. functions) at the branches in-scope of this wave (Real Estate, Fleet & Facilities, and Parks & Roads);
- **EAM Implementation Wave 2 (ERP Wave 4.2)** in which EAM Work Management, Asset Maintenance and Asset Operations modules will be implemented. Process standardization, data migration and service delivery and governance model design will occur in parallel with capabilities (i.e. functions) at the branches in-scope of this wave (Real Estate, Fleet & Facilities, and Parks & Roads); and
- **EAM Integrations Wave** in which EAM modules will be integrated with other ERP modules and feeder systems wherever needed.

8.2.4 POSSE Modernization Initiatives

The following initiatives will be completed as part of this stream (with approximate timelines highlighted in parenthesis).

8.2.4.1 POSSE Modernization Preparation Initiatives (January 2019 - March 2021)

POSSE Modernization Preparation Initiatives include:

- **Permits & Licensing Tool Evaluation & Procurement** of a solution (e.g. POSSE, Accella, and ESRI CityWorks) based on business requirements, architecture, and cost and benefit considerations; and
- **Workflow Management System Tool Evaluation & Procurement** of a solution (e.g. ServiceNow, BMC Remedy, and Salesforce) based on business requirements (including case management, queue management etc.), architecture, and cost and benefit considerations.

8.2.4.2 POSSE Modernization Implementation Initiatives (April 2021 - December 2022)

- **POSSE Implementation Wave 1** in which the selected Permits & Licensing Tool will be implemented out-of-the-box (i.e. without modifications). Process standardization for Urban Form business units in scope of this wave will occur in parallel to the implementation, building on the ongoing Urban Form Business Transformation initiative. Point integrations to SAP, PeopleSoft, Tririga, and ESRI may be required in the interim. These integrations can later be moved to the Systems Integration Layer when the core ERP Implementation has been completed;
- **POSSE Implementation Waves 2 & 3** in which the selected Workflow Management Tool will be implemented out-of-the-box (i.e. without modifications), without modifications. Process standardization and workflow migration sprints will occur for the highest priority workflows selected by City stakeholders. Each workflow

will be moved to the selected workflow management system along with its integrations and associated data; and

- **POSSE Integration Waves** in which two waves of integration will be undertaken. The first wave will be focused on integrating the newly implemented Permits and Licensing system with the new ERP and other applications such as GIS, and the second wave will integrate the newly implemented Workflow and Service Management Tool with the new ERP and other applications such as GIS. In addition, interim point integrations may be needed for the Permits and Licensing tool with SAP, PeopleSoft, Tririga, and ESRI, as mentioned earlier.

8.2.5 Communications and Change Management Initiatives

The following initiatives would be completed as part of this stream (with approximate timelines highlighted in parenthesis).

- **Program Governance Setup:** In this initiative, a governance structure will be established to manage decision making and support ESTP. This initiative will include stakeholders from across the organization and have an established meeting frequency;
- **Organizational Change Management Strategy Preparation:** this initiative will include the formation of a change management team comprised of external resources along with internal City of Edmonton resources. The key activities during this phase include performing current state and cultural assessments, developing a stakeholder engagement plan, and creating a high level organizational change management strategy;
- **Organizational Change Management Strategy Rollout** will engage stakeholders from across the organization to assess change management and training needs, and to understand how best to channel the organization's current capabilities and competencies for the ERP transformation;
- **Organizational Change Management Strategy Implementation:** This initiative will include the development and delivery of tailored communications for all ERP Initiatives, including developing key messages, management of change activities and governance of change management initiatives through monitoring communications and stakeholder engagement metrics;
- **Creation and Administration of Training:** This initiative will include the development of a training plan using information gathered from the training needs and competency assessments. Training modules will be developed for each phase of the ERP implementation. Training will be designed based on stakeholder needs and will incorporate several different training methods; and
- **Internal and external Stakeholder Engagement POSSE:** This initiative will specifically target City employees and Edmonton residents that will be affected by the POSSE Modernization. This initiative will identify all stakeholders and their communications and change management needs and will include development and implementation of the stakeholder engagement plan.

8.2.6 Program Sustainment Initiatives

ESTP will require sustainment and support after the implementation of ERP modules. The support will primarily be provided through the following initiatives:

- **ERP Internal Support Center** will play a crucial role during latter implementation stages of the Cloud ERP and through the post implementation sustainment phase. This organizational unit will provide Tier 2⁵ (medium

⁵ Tier 2 Support requires a degree of functional and/or technical knowledge, and is staffed by resources with troubleshooting capabilities. Tier 2 support staff is often experienced and knowledgeable on a particular product or service

level expertise) support to all corporate and business units that will be using the newly implemented Cloud ERP, and will act as a hub of knowledge supporting the City's ERP users; and

- **Ongoing Change Management and Training** is critical to the sustainment of the ERP system. A dedicated change management team will support stakeholders across the organization through continually providing tailored communications along with training and coaching.

8.3 Program Interdependencies

In addition to interdependencies between initiatives on the roadmap, there are some additional interdependencies with other initiatives at the City. These include:

- **Enterprise Information Management (EIM) initiative:** The EIM initiative will identify information / data types, data classification and categorization at the City as well as defining the policies and procedures required to manage this information and data at the City across all of its branches. This initiative will likely inform the preferred toolset for storing the data records moved from POSSE system and will impact POSSE modernization initiatives;
- **Service Management strategy and roadmap:** This initiative is recommended to define the City's Enterprise Service Management roadmap and strategy, including the preferred service management toolset. Enterprise Service Management Strategy defines standardized service management methodologies, descriptions and service delivery toolset for the services delivered by the City's branches. As these services are identified and defined by the Program and Service Review (PSR) initiative, standardizing management and delivery mechanisms will provide citizens and businesses with a consistent experience across all services requested from the City.
As modern day enterprise service management toolsets also offer workflow management capabilities, the selection of this toolset will directly impact the selection of a Workflow Management System (WMS), which is required for POSSE modernization initiatives;
- **Cybersecurity policies:** While these policies will not have a direct impact on the ESTP, some policies, such as data retention policies, data repatriation policies, data ownership rights, may dictate contract negotiations with the selected ERP provider; and
- **SAP Ariba Implementation:** The initiatives in the business case roadmap will need to align with the currently ongoing SAP Ariba implementation, which is expected to be completed by Q1 2020. The implementation of ESTP's Cloud ERP Supply Chain - Inventory and Warehouse management modules - starts in Q2 2021. It is important to note that the SAP Ariba implementation is aligned with the Core Homogeneous ERP option recommended in the business case.

9 ESTP Resource Requirements

The ESTP program will require a significant resource investment by the City, including large numbers of City staff across each of the core functions being transformed. The business case identifies a need for internal resources from the City's Executive Leadership Team, the Open City and Technology branch, and other business units. Apart from internal resources, the City will need external vendor advisory and technical implementation resources to support the preparation, implementation and sustainment of the Program. The major stakeholder groups (internal and external) identified for the purpose of resourcing are outlined below.

9.1 ESTP Stakeholder Groups

- **City of Edmonton Leadership:** The City leadership group will comprise of the ESTP Sponsor, the ESTP Advisory Board, the City of Edmonton Executive Leadership Team, the Business Technology Steering Committee, and the Business Technology Working Group. This group will identify stakeholders to resolve escalated risks and issues and provide decisions and direction to the delivery team.
- **City of Edmonton Branch Leadership & Staff:** This group will have leadership representation from Financial Services, Financial Strategies and Budget, Corporate Procurement and Supply Services, Corporate Safety and Employee Health, Human Resources, Law, and Real Estate. In addition, procurement facilitation services for all ESTP related procurement activities will be provided by procurement staff.
- **Open City and Technology (OCT) Leadership:** This technology-led implementation will be championed by OCT leadership, including the Branch Manager, Chief Information Security Officer, Directors, and other Senior leaders from the OCT branch.
- **OCT Staff:** This group includes representatives from the Enterprise Architecture team and IT teams within the OCT branch of the City. Representatives from this group will participate in all phases on an as required basis, working with other internal and external teams to support the implementation of the new ERP and its integration with existing systems.
- **Core Project Teams (Internal):** These teams will be composed of the internal project team or teams who will collaborate with external consultants to execute and deliver the initiatives outlined on the roadmap based on direction provided by the City, Branch and OCT leadership,.
- **Core Project Teams (External):** These teams will include the external consultants who will collaborate with the City to deliver the various initiatives outlined on the roadmap and perform day-to-day project technical, process and project activities related to the Program.
- **Functional Specialists:** These specialists will provide business representation from various branches that will use the new ERP in the future. These specialists will be engaged during the various stages of the systems implementation lifecycle.
- **ERP Internal Support Center:** A new ERP Internal Support Center will be established as part of the preparation and implementation phases of the Program. Comprised of business, technical and project resources, this ERP Internal Support Center will play a crucial role during the later stages of the implementation phase, and will provide ongoing support during the sustainment phase of the Cloud ERP. The Center will provide Tier 2 (medium level expertise) support to all corporate and business units that will use the ERP, and will act as a hub of knowledge for the ERP.

Detailed resourcing for each of the above stakeholder groups split by preparation, implementation and sustainment phases can be found in [Appendix C - Resourcing Requirements](#).

9.2 Proposed ESTP Governance

Following best practice research as well as successes and lessons learned from other leading public sector organizations, it is critical to identify the key governance bodies necessary to establish consistency and standardization across the City. The proposed governance structure will be put in place during implementation and will continue to operate throughout all key initiatives to ensure efficiency and accuracy in decision making and risk escalation. Activities required to establish a functional governance structure include:

- Development of a centralized governance model;
- Development and deployment of governance policies and procedures (including mandates, roles and responsibilities, approvals and governance processes for the engagement);
- Identification and implementation of appropriate success and performance metrics and measures; and
- Alignment of technical architecture of ESTP to support and sustain operations.

Maintaining a centralized approach to governance will be key to enabling the success of ESTP and establishing standard, consistent technology and processes across the City.

Figure 8 summarizes the high level governance structure for the ESTP initiative:

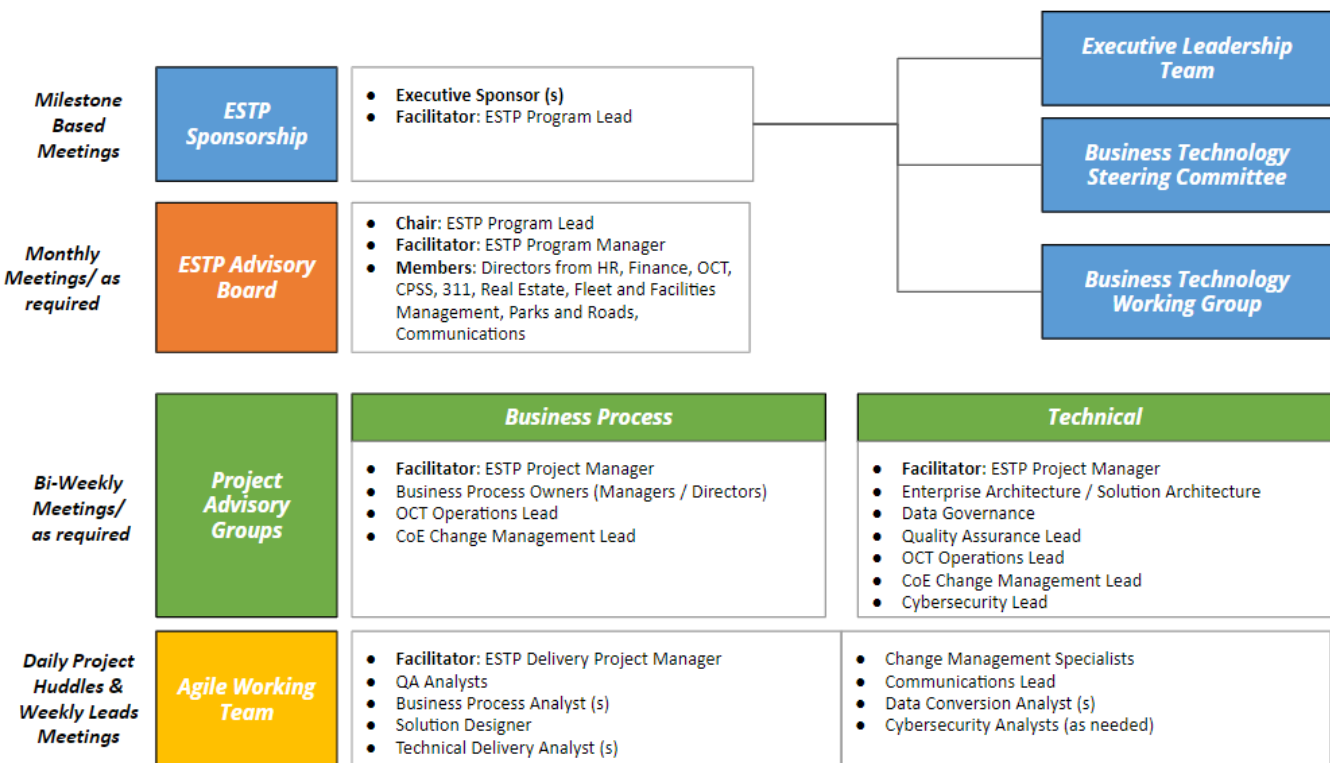


Figure 8: ESTP Governance Model

The mandate and responsibilities for each of the governance bodies identified in figure 8 are discussed in [Appendix D - Mandates and Responsibilities](#).

10 Organizational Readiness Approach & Strategy

The City is a leader in transformation, as demonstrated through multiple initiatives such as Program and Service Review, Enterprise Performance Management, and the Business Technology Strategy. As the City moves forward with the ESTP program, a clear change management strategy is required to align, engage and create ownership of the changes that will occur across the organization. City departments and branches will need to work collectively to create a robust change management strategy for the program. Engaging City’s employees will be critical to the success of the program.

10.1 ESTP Organizational Readiness Assessment Approach

Organizational readiness is a key component of any large business transformation and is an indicator of how well-informed stakeholders are about the transformation, their attitudes towards the transformation and their reaction to the organizational change management and communication efforts. Organizational Readiness Assessments provide periodic pulse-checks of people's ability to transition to new ways of working.

The business case used the following approach to conduct the organizational readiness assessment that informed the proposed Organizational Change Management (OCM) Plan and change strategy.

STEP 1: Develop the Change Vision	STEP 2a: Conduct a Organizational Readiness Assessment	STEP 2b: Assess Staff Communications and Engagement Needs	STEP 2c: Assess Culture Alignment with the Change Vision	STEP 3: Define the Best-Fit Change Management Approach
<ul style="list-style-type: none"> The change vision describes why the initiative is being undertaken and what the desired future benefits will be. It provides an overarching story that can be communicated throughout the change life cycle. This defines a shared understanding of what success looks like. The business case utilized the vision set-up in BTS for identifying the change vision for the program. 	<ul style="list-style-type: none"> Initial Organizational Readiness Assessment was conducted to analyse the organisation's overall change appetite, known change management strengths and tactics for change management for the program. 	<ul style="list-style-type: none"> This step identified the communication and engagement requirements based on the stakeholder groups in the City as well as those groups that will be impacted through the program. Through the assessment a best-fit communications approach was identified. 	<ul style="list-style-type: none"> The assessment of the City's culture against the change vision provided an understanding of the gap between the current and the desired ways of working. It helped develop an understanding of what is required to align behaviours with the change initiative vision. 	<ul style="list-style-type: none"> At this stage, the Best-Fit Change Approach is defined and designed. This approach outlines the type of change, as well as the knowledge, behaviours and capabilities required from each impacted stakeholder to manage and deal with the change.
<ul style="list-style-type: none"> The business case performed the Organizational Readiness Assessment, Communication and Needs Assessment and Culture Alignment Assessment through focus group discussions and gathered insights on organizational demographics, perspectives on the impact of change, and initial stakeholder commitment. As a sample set, a group of OCT team members were invited for one-hour discussion to provide an understanding of the level of change readiness for the City of Edmonton in addition to issues and considerations that should be carefully through when designing change and communications activities In addition, lessons learnt from previous transformative projects were also included to inform ESTP program's change management approach. 				

Figure 9: ESTP organizational readiness assessment approach

10.2 Insights and Recommendations - Organizational Readiness Assessment

As part of the business case, an organizational readiness assessment was conducted with the objectives of:

- Establishing a baseline as to where different stakeholders sit on the change readiness spectrum, allowing the opportunity to measure throughout different project phases;
- Identifying existing strengths that can be leveraged throughout the transformation; and
- Identifying opportunities and tactics to improve stakeholder readiness for change.

Based on the assessment, the following **key strengths** were identified:

- There is a clear case for change that can be championed through the leadership team and across the organization;
- There is an appetite for the business and information technology teams to work together to ensure that the ESTP is well aligned to meet the needs of the City of Edmonton; and
- There are groups of stakeholders that show high commitment levels even if the level of impact to their areas is reportedly high.

The **key opportunities and areas of focus** identified during the initial focus group were:

- Stakeholder communications can be enhanced to effectively communicate ESTP roadmap and stakeholder value;
- Stakeholder buy-in can be improved through early engagement; and
- Change fatigue from past initiatives should be taken into consideration.

Based on the focus group and overall organizational readiness the business case makes the following **recommendations**:

- Establish a strong communications and change management initiative to create awareness, instill anticipation, and ensure on-board processes and project knowledge are ready;
- Create key messages describing the corporate benefits and positive job impacts to be derived from transformation;
- Leverage stakeholders as change champions, influencers, and advocates where and when possible;
- Set expectations early in the process, particularly around project benefits and scope;
- Identify notable opportunities to further engage leadership in ESTP messaging and activities;
- Encourage support for communications from leadership, which is imperative to ensure stakeholder engagement; and
- Collaborate with City business areas to address the challenges associated with balancing the timelines and effort required by the ESTP implementation with other corporate priorities.

10.3 Proposed ESTP Organizational Change Approach

Change management, communications and stakeholder engagement strategies need to be developed in tandem in order to drive a successful transformation. Specifically, tailoring the change management approach to address the needs of different types of stakeholders across the City is imperative. The change management strategy should take into account staff communication and engagement needs, cultural alignment and the degree of adherence to the change vision.

The Change Management approach considers the findings from the readiness assessment as well as the following foundational principles from similar public sector transformations:

- Anchoring the change in the business and technology strategy;
- Prioritizing initiatives based on value-based outcomes for the City and its stakeholders;
- Creating a personal and empowering experience for people through intentional and engaging communications; and
- Encouraging adoption of prioritized initiatives through early engagement, and through ongoing learning and development.

The overall organizational change management and communications plan is described below.

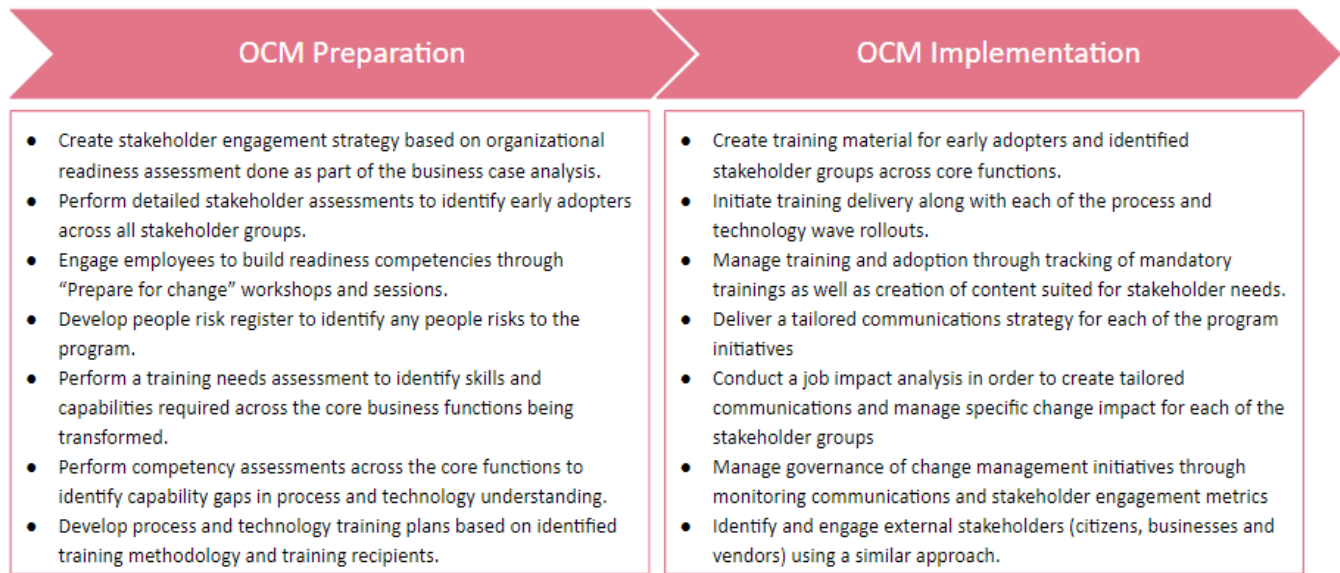


Figure 10: Organizational Change Management Approach

Organizational change management will include stakeholder-specific strategies to ensure that the City communicates with employees and citizens throughout the process so that stakeholders are prepared for the changes that will result from the ESTP modernization.

Organizational change management will put the citizens at the center of change, requiring collaboration across the City business areas. The business case recommends building a core change management team to be present throughout each of the change management activities and that has participation from branches and vendors.



11 ESTP Financial Analysis

11.1 Cost - Benefit Analysis Results

ESTP’s estimated costs and benefits were analyzed to assess the expected return on investment and payout of the overall capital investment required for the delivery of the program for all four options assessed in this business case. However, the details throughout this section are specific to the recommended option,Core Homogeneous ERP. The summary of the financial analysis for all options is available in [Appendix J - Financial Analysis for All Options](#).

From 2019 to 2029, the following financial metrics are expected for the program.

Program Gross Benefits	\$209.1 million
Program Implementation and Sustainment Costs	\$119.8 million
Implementation	\$53.9 million
Sustainment	\$65.9 million
Program Net Benefits	\$89.2 million
Net Present Value	\$62.2 million
Internal Rate of Return	20 %
Return on Investment	74.5%
Payback in Years	7.3 Years

The yearly breakdown of the **expected Net Benefits** of **\$89.2 million** is provided in the graphic below. For each year, the net benefits are based on annual expected gross benefits, less the annual expected costs for the program.

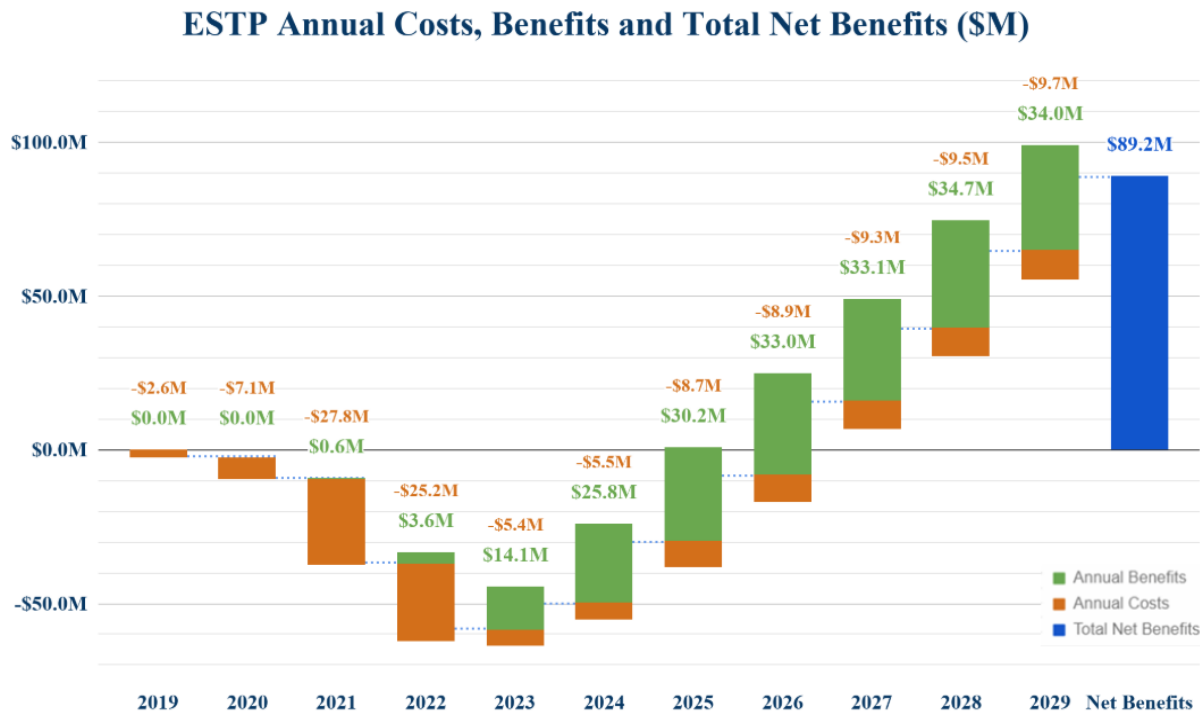


Figure 11: ESTP annual costs, benefits and net total benefits breakdown by year

11.2 ESTP Costs

The costs of this program were estimated for an 11 year period for the Core Homogeneous ERP option from 2019 - 2029. The costs include the estimates for technology procurement and licensing, and implementation and sustainment costs for internal City and/or external consulting/vendor resources cover all initiatives outlined on the program roadmap, with the exception of the following ancillary initiatives:

- Design Organizational Capability Model;
- Develop ERP Data Governance;
- Develop ERP Internal Support Center Demand Management Processes; and
- Develop ERP Knowledge Management.

11.2.1 Cost Analysis Approach and Assumptions

The analysis of costs for program initiatives is **effort driven**, and based on a **bottom-up approach** that costs all initiatives on the roadmap and rolls those costs up into appropriate views.

The major assumptions made in deriving costs are as follows:

- The study period for each of the options has been harmonized to ten years from the start of implementation. For SAP Cloud First option, this period is from 2019 - 2028. For Core Homogeneous and Best of Breed options, this period is 2019 - 2029 due to longer upfront procurement preceding the implementation;
- Cost estimates are provided based on the scope of work but do not constitute a guarantee. Costs may change based on the implementation timeline selected by the City;
- Rates used for external support are based on competitive Edmonton and Calgary market rates for consulting services;

- Rates used for resources internal to the City are derived from the following:
 - Internal Branch resource rate tables (OCT)
 - Collective Bargaining Agreement (CSU 52) 2018 resource rates
 - 2019-22 proposed City operating budget (blended branch rates for Finance, Human Resources and OCT)
 - Blended resource rates provided by the City (CPSS)
- Annual factors are used to account for average year-over-year cost increase. These factors are based on the Municipal Price Index (MPI) of the City of Edmonton, and the Commercial Software Price Index (CSPI) published by Statistics Canada;
- Costs for external resources are assumed wherever external specialist skills will be required; and
- Other assumptions related to program implementation and sustainment costs have been detailed in [Appendix G - Financial Analysis Assumptions](#).

In general, the business case financial model has been developed using a **conservative modelling approach**. This approach implies that the costs have been estimated on the higher end of expected cost values, while the benefits have been estimated on the lower end of expected benefit values. This conservative approach was taken to provide a contingency for the City's investment in order to respond to issues such as unforeseen delays or challenges in realizing full benefits.

Some of the key cost assumptions that support the conservative approach are:

- Status Quo costs that carry over to the future state have been ramped down at a conservative rate over a period of five to six years, though these costs can likely be ramped down earlier and at a faster rate;
- Infrastructure costs related to existing on premise systems have not been ramped down at all over the 10 year implementation period, even though there is likely to be some level of infrastructure cost rationalization by moving to a cloud platform;
- Costs have been estimated for the initiatives on the ESTP implementation roadmap by factoring contingencies such as unforeseen delays in all phases of the program; and
- Costs have been estimated for internal resources at their highest rates based on internal rate cards, inflating the costs for the new program;

11.2.2 Preparation, Implementation and Sustainment Costs

The costs for this program may be rolled up into its three phases - preparation, implementation and sustainment. Preparation and implementation phases of the program run from 2019 to 2022. All of the costs associated with these two phases are one-time costs. The sustainment phase is scheduled to commence in late 2020, and full sustainment will begin in early 2023 after the implementation of the entire ERP has been completed. All costs related to the sustainment phase are ongoing costs (paid on a continuous basis). **Ongoing costs related to the sustainment phase include costs for software licensing and vendor support, ERP internal support center, contingencies, future enhancement projects, and ongoing personnel training.** The program implementation and sustainment costs by each phase have been summarized in the following chart.

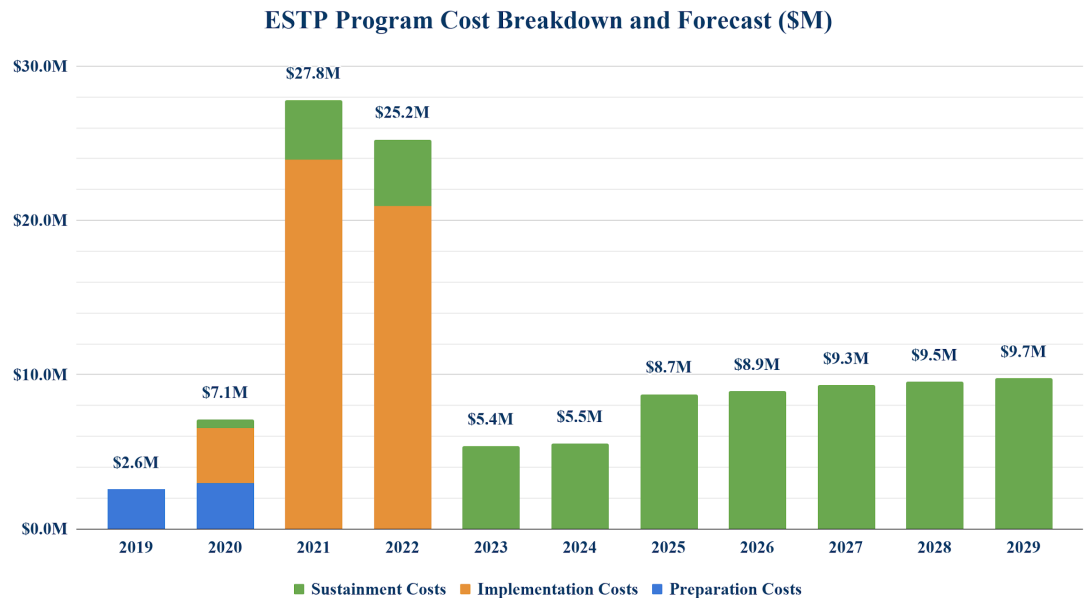


Figure 12: ESTP Program Implementation and Sustainment Costs Breakdown

11.2.3 Initial and Total Funding Requirements

The Initial funding requirement is defined as the funding that the City will need for the **first four years** of the program, from **2019 to 2022**. The requirement includes costs for all key program preparation and implementation initiatives outlined on the implementation roadmap, and for a few sustainment initiatives between 2019 and 2022, namely software and system integration layer licensing costs, and ERP internal support costs. As such, the funding requirement of this time period (i.e. 2019-2022) is expected to be around **\$62.7 million**. The total funding requirements including preparation, implementation and sustainment costs⁶ over 11 years (i.e. 2019-2029) is expected to be around **\$119.8 million**, as outlined in the chart below. Sustainment costs include costs for software licensing and vendor support, ERP internal support center, future enhancement projects, and ongoing personnel training.

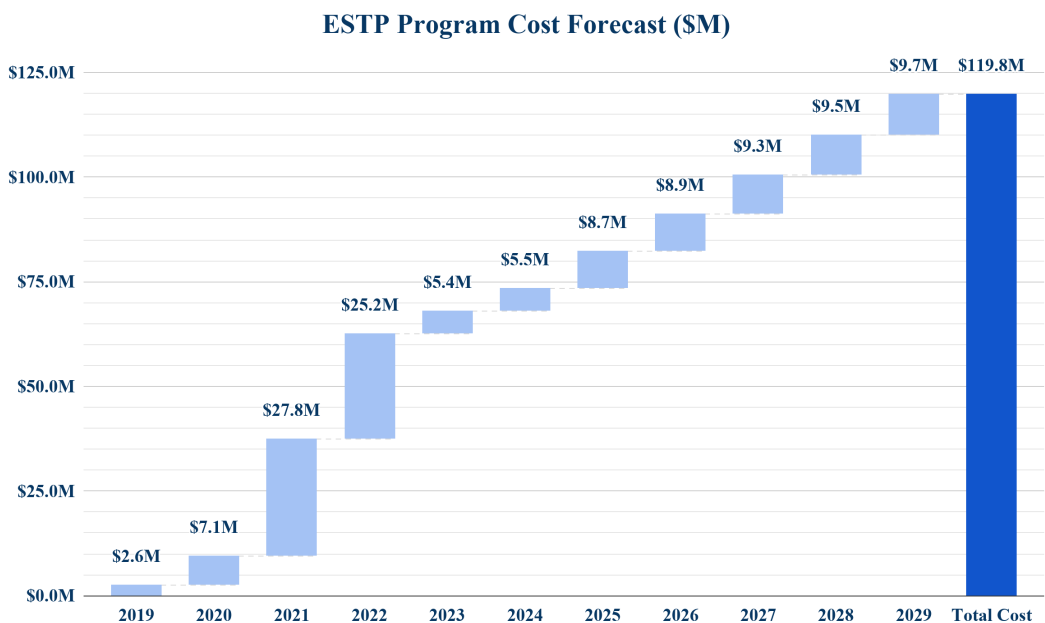


Figure 13: ESTP Program Implementation and Sustainment Costs Totals by Year

The following table provides a summary of the 11-year program implementation and sustainment costs. A detailed yearly breakdown of the 11-year program implementation and sustainment costs can be found in [Appendix H - Detailed Breakdown of Program Implementation and Sustainment Costs](#).

Cost Category	Total Costs Estimate (2019-2029)
One-Time Costs	\$53.9 million
Ongoing Costs	\$65.9 million
Program Implementation and Sustainment Costs	\$119.8 million

⁶ Ongoing costs related to the sustainment phase include costs for software licensing and vendor support, ERP internal support center, contingencies, future enhancement projects, and ongoing personnel training. These costs will replace a portion of the costs of sustaining current state

11.3 ESTP Benefits

The expected benefits from this program cover a breadth of qualitative and quantitative factors. As the City of Edmonton transforms its enterprise technology environment, the benefits of modernization and standardization to be realized. This section outlines the analysis, estimation and proposed realization approach for the program benefits.

11.3.1 Benefit Analysis Approach

The approach to analyzing the Qualitative and Quantitative benefits from this program is outlined in figure 14 below:

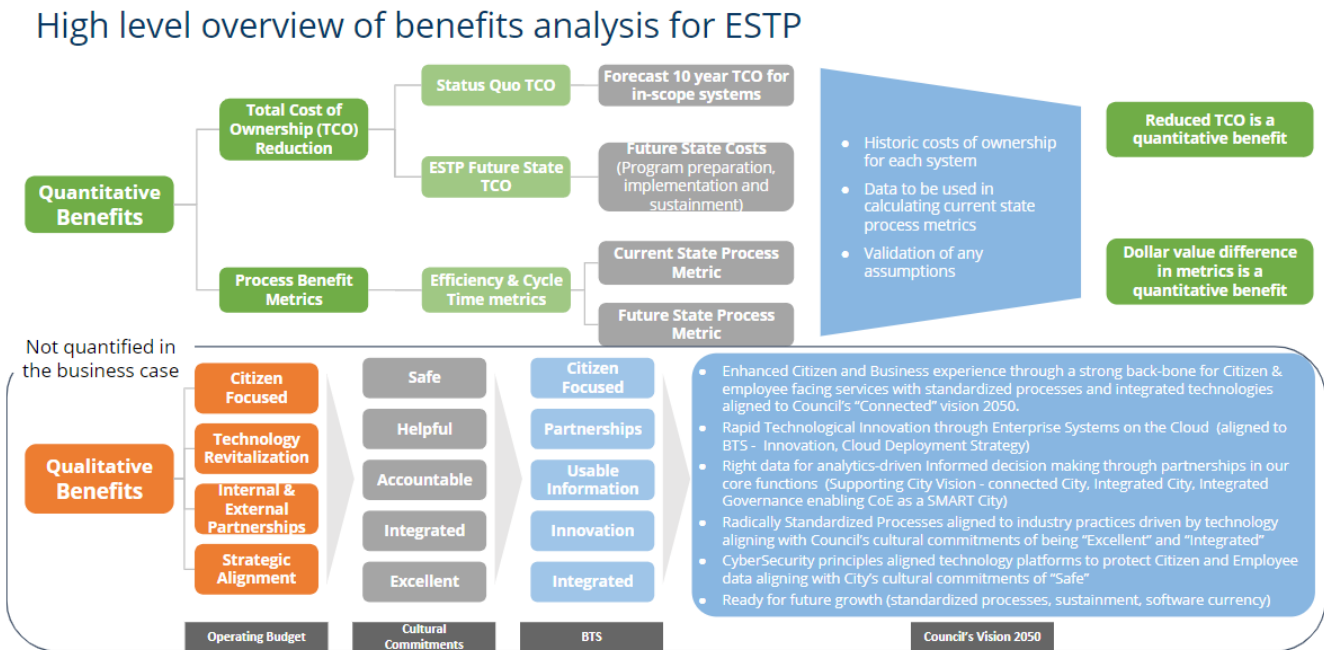


Figure 14: ESTP Program Benefits Overview

Qualitative benefits from this program have been captured and aligned to the **Council's Vision 2050**, the City's **Operating Budget**, components of the City's **Cultural Commitments**, and key elements of the City's **Business Technology Strategy**. Quantitative benefits from this program are captured and aligned to **Reduction in Total Cost of Ownership** and **Process Efficiency Improvement**. The baseline cost of ownership is based on the forecasted costs of maintaining Status Quo (i.e., the Status Quo option of this business case). Analysis done for this business case concludes that the total cost of ownership resulting from implementing the recommendation is expected to be lower than maintaining the status quo. Process efficiency improvement benefits are captured by comparing process efficiency and cycle time current state metrics to future state metrics based on relevant industry benchmark metrics from public sector organizations⁷.

⁷ APQC Government and Military Benchmarks used for this business case analysis.

11.3.2 Qualitative Benefits Analysis

The qualitative benefits of this program will enhance operations and service delivery at the City. As discussed in the section 4 of this business case, ESTP will drive efficiencies and effectiveness by implementing leading practices to standardize processes and introduce modernized, integrated technology platforms. These qualitative benefits will help the City be ready for future growth through standardized processes and sustainment methods, with impacts on operations, service delivery, and citizen and employee experience.

Citizen Driven Services: The ESTP will provide intuitive and consistent experiences across devices, improve turnaround times for services requested by citizens and businesses, and increase citizen engagement. In alignment with Council's "Connected" vision for 2050, these benefits will be enabled through a strong back-bone for service delivery along with standardized processes and integrated technologies. Specifically, ESTP is expected to enhance citizen service delivery through:

- Standardizing core processes and functions across the City;
- Enabling the use of mobile communications and other emerging means of service delivery (e.g., mobile pothole assessments, remote monitoring of parks and roads, eCitizen identity management);
- Providing data to citizens in near real-time for their service requests as well as for City's performance;
- Using more adaptive and focused communications channels for notifications, customer relationship management, and disputes management; and
- Developing a City of Edmonton wide service delivery model focused on connecting the needs of citizens and businesses to the core enterprise functions at the City.

Employee Productivity: ESTP will increase employee productivity through enhanced ERP service accessibility and readiness. Standardized processes aligned to industry best practices support the City's cultural commitments of being "Excellent" and "Integrated". In streamlining enterprise functions like Finance, Human Resources and Corporate Procurement & Supply Service, ESTP will better enable employees to efficiently deliver City services. Additionally, ESTP will simplify interactions and break silos between branches by providing integrated enterprise services including:

- Increase employee capacity for value-add work by automating processes that are low complexity and high volume (e.g. off-boarding, AR/AP, mass seasonal hiring, etc.);
- Maintain consolidated financial systems of record to simplify and streamline reporting on actual spending against operating and capital budget;
- Shorten the capital and operating budget reporting cycle time through higher process efficiency;
- Enable rolling multi-year budget cycles based on leading practices in municipal administration;
- Streamline compensation, payroll, pension and benefit payments administration by implementing fit-for-purpose ERP modules and establishing solid integration between HR and Finance modules;
- Increase effectiveness and reliability of end-to-end payroll processes and supporting technologies at the City through consolidation and centralization of time entry, time reporting and staff scheduling capabilities;
- Enhance enterprise workflow management, enterprise asset record management, and customer relationship management capabilities through focused governance and technology support in rationalizing the use of POSSE at the City;
- Establish a cohesive mandate of land leasing through a unified system of record for land at the City; and

- Setup governance and implement supporting technologies to enable a full enterprise lifecycle management mandate at the City.

Analytics Driven Management: ESTP will improve data quality and analytics at the City by generating centralized, accessible and reliable information to manage resources and to support the City in making more informed business decisions. This is in alignment with the City's vision for a Connected City, Integrated City, and SMART City. Some examples of expected functional improvements include:

- Enhanced data collection and analytics for management on integrated workplace use, operations, maintenance, financial services, and environmental sustainability; and
- Increased ability to produce consolidated end-to-end analytics of service delivery.

City Leadership Transparency: ESTP will integrate the City's enterprise technology and governance landscape and support the City's leadership vision of an Open City and a SMART City. Some examples of expected benefits for City Leadership include:

- Focused development of knowledge management and succession management governance and supporting technology to increase the City organization's resilience to change;
- Standardized processes aligned with modernized technology will provide City leadership with the foundation for the development of a value delivery focused enterprise culture; and
- Increased access to reliable analytics will enhance the overall transparency.

Technology Revitalization: ESTP will increase the City's capacity for rapid technological Innovation through enterprise systems on the Cloud in alignment with the Business Technology Strategy pillars of Innovation and the Cloud Deployment Strategy. Some examples of expected technology revitalization benefits include:

- Eliminating the need for bulky, inefficient and unreliable point-to-point integration between current enterprise systems and applications (including many examples of integrations between M5, SAP, PeopleSoft, Questica, POSSE, SLIM, etc.);
- Rationalizing the City's portfolio of enterprise applications, reducing complexity and total cost of ownership, and increasing agility and responsiveness to Citizen expectations and technology advancements;
- Focusing the use of enterprise systems and applications on their intended purpose and shifting away from heavily customizing tools ; and
- Enhancing the Cybersecurity of the City through technology platforms designed to protect Citizen and Employee data, in alignment with the City's cultural commitments of Safety.

11.3.3 Quantitative Benefits Analysis

The quantitative benefits of this program encompass a reduction in the Total Cost of Ownership of enterprise systems at the City, as well as increased efficiencies in processes utilized by enterprise functions at the City. All assumptions related to benefits calculations have been detailed in [Appendix G - Financial Analysis Assumptions](#).

In line with the **conservative modelling approach**, all benefits have been estimated on the lower side of expected benefits values. Some of the key benefits assumptions that highlight the conservative approach are:

- Benefits from the new technology implementation and the associated process standardization have been ramped up at a highly conservative rate over a period of six to eight years, even though these benefits can likely be ramped up earlier and at a faster rate;
- Process benefits have been realized at conservative internal resource rates by reducing the branch blended rates by 5 percent (e.g. Finance, HR), or by using a lower blended rate as provided by the City (e.g. CPSS);
- Process efficiency improvement benefits arising from POSSE and EAM streams have not been quantified, even though new systems will provide process benefits in those areas; and
- A discount rate of 3 percent has been used to discount the future state benefits (and costs), even though the City's 10-year financing rate is between 2 percent to 2.67 percent. This lowers the net present value of the investment.

The following table provides a summary of gross benefits estimates for the recommended option (Core Homogeneous ERP) in this business case. (Note: Figures might not add up exactly due to rounding):

Benefit Category	Total Benefits Estimate (2019-2029)
Total Process Efficiencies	\$71.7 million
Finance Process Efficiencies	\$45.0 million
HR Process Efficiencies	\$23.5 million
CPSS Process Efficiencies	\$3.3 million
Total TCO Reduction (Gross) Benefits	\$137.3 million
SAP TCO Reduction	\$79.0 million
POSSE TCO Reduction	\$20.1 million
PeopleSoft TCO Reduction	\$27.9 million
HR and EH&S Applications TCO Reduction	\$6.9 million
External IT Support Groups Cost Reduction	\$3.4 million
Total Benefits (Gross)	\$209.1 million

This business case considers **harvestable** benefits to be savings that may be realized through lower City expenditures, and **non-harvestable** benefits to be savings that may be realized through the reallocation of resource capacity to alternative value-added tasks. As such, benefits from reduction in capital/project, licensing, vendor support, and infrastructure costs are considered to be **harvestable**, and benefits from reduction in personnel costs are considered **non-harvestable**. The breakdown by these categories can be found below.

Benefit Category	Benefits Estimate (2019-2029)
Harvestable Benefits (Gross)	\$88.5 million
Non-Harvestable Benefits	\$120.5 million
Total Benefits	\$209.1 million

In capturing the **Total Cost of Ownership Reduction (Gross)** benefits for this case, baseline costs were gathered from the City and used to forecast the costs required to maintain status quo for the period extending from 2019 to 2029. The future state costs reduction for each option were estimated based on assumptions regarding cost ramp down, which are aligned with systems being decommissioned. The TCO Reduction benefits summary is shown in figure 15 below. Assumptions underlying forecasted Total Cost of Ownership Reduction benefits can be found in [Appendix G - Financial Analysis Assumptions](#).

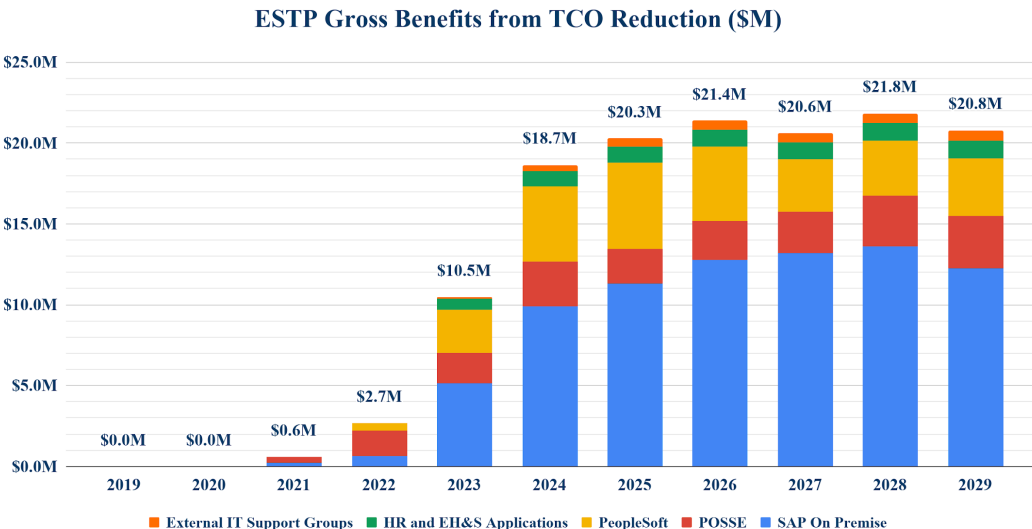


Figure 15: TCO (gross) Reduction Benefits Breakdown

In capturing the **Process Improvement** benefits for this case, process efficiency and cycle time metrics were selected for process groups within Finance, Human Resources and Corporate Procurement & Supply Services. The data inputs required to calculate the current state values for each of these benefit metrics were gathered from the City where possible and estimated based on assumptions when needed. The assumptions related to process improvement benefits have been detailed in [Appendix G - Financial Analysis Assumptions](#). The future state values for each of these benefit metrics were defined as an achievable target based on the gap to the industry benchmark for each metric. These industry benchmarks are median values from the AQPC Government sector benchmark surveys. An important assumption in quantifying the process benefits relates to the annual revenue for the City - assumed to be approximately \$3 billion based on the 2017 Annual Report published by the City. The operating revenue used is the City of Edmonton's total revenue excluding net transfers to Boards and Commissions (such as EPS and EPL etc.), and EPCOR revenues. The City's Boards and Commissions and EPCOR have separate operating structures (with their own

FTEs supporting functions such as HR) and, hence, this headcount will not be impacted by the business case. Other assumptions related to process benefits can be found in [Appendix G - Financial Analysis Assumptions](#).

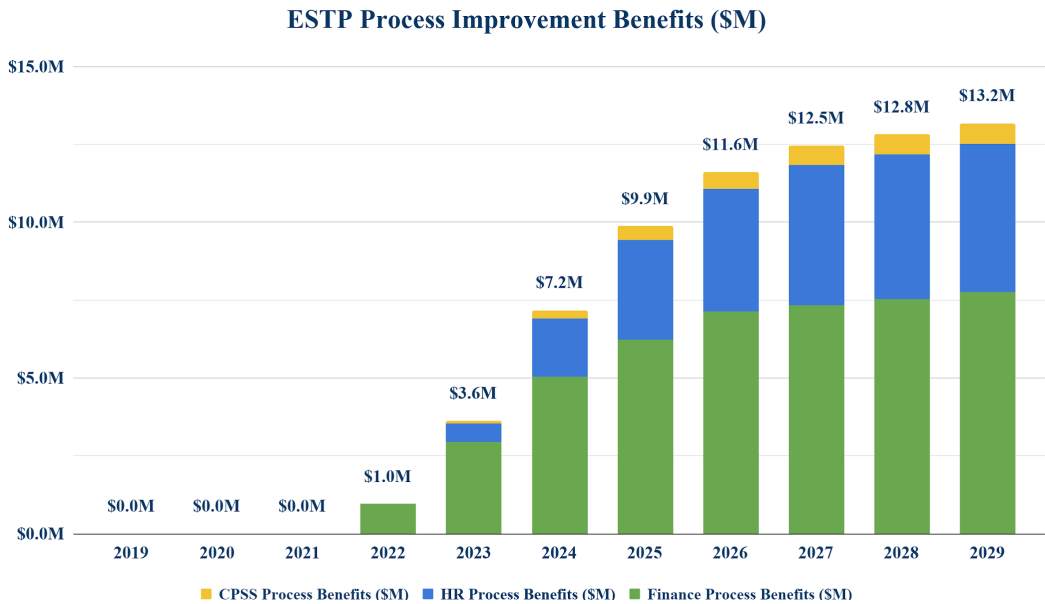


Figure 16: Process Benefits Breakdown

11.3.3.1 Benefits Estimates Breakdown

Financial breakdown by Function (HR, Finance, and CPSS) can be found in [Appendix I - Cost Benefit Analysis Breakdown by Function](#) for a Core Homogeneous ERP.

11.4 Benefits Realization Approach

The proposed approach for the City to realize the benefits outlined in this business case is integrated in the delivery of the ESTP. As a major implementation wave or stream on the roadmap is completed, the decommissioning of old technology will trigger the reduction of TCO for related technologies. As City employees are trained on new systems and the standardized processes supported by those systems, the processes will become more efficient and benefits will be realized in a gradual manner. Key assumptions related to benefit realization can be found in [Appendix G - Financial Analysis Assumptions](#).

12 Proposed ESTP Sustainment Plan

ESTP focuses on transforming processes and technology platforms by aligning them with industry leading processes and toolsets. The City understands that, in order to continue realizing benefits from a vital investment such as ESTP, it will need to undertake additional sustainment practices.

In order to successfully sustain processes and technologies for each of the core functions, the City will need to design and define operating models and service delivery models for each of the core functions. These operating model design efforts will establish a solid foundation for the systems implementation as part of the program.

As the program focuses on best practice business process standardization and integration, the operating model design will focus on value delivery and capability development for each key functional area. Meanwhile, the service delivery model will support and guide the evolution of the system that is implemented.

objective

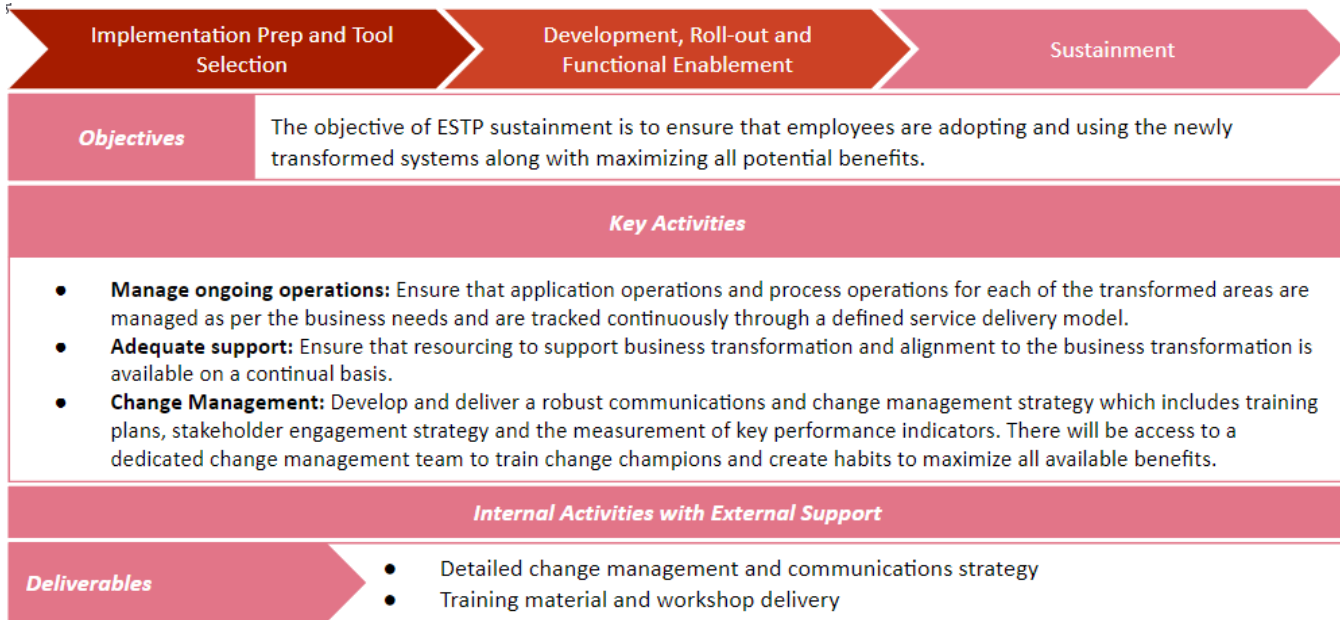


Figure 17: Proposed ESTP sustainment approach

Additionally, the City of Edmonton will establish an ERP Internal Support Center team dedicated to identifying improvement opportunities related to people, process, structure, and technology.

12.1 Continuous Improvement

As a part of the Program, Administration advises that the City develop a dedicated ERP Internal Support Center team to drive continuous improvement, enable and sustain benefit realization, and to support the long term success of the ESTP. The Support Center team will identify, prioritize, and implement improvement opportunities related to business process, people, and technology. The objectives of the continuous improvement initiative are to:

- Enhance capabilities;
- Drive value; and
- Provide guidance and governance.

These objectives will be achieved through the following activities at people, process and technology levels:

People

- Empower City of Edmonton staff with information, allowing them to react quickly to changes and issues;
- Develop and coach underperforming teams to improve capabilities;
- Maintain a focus on team performance through reinforcement of optimal behavior for all team members;
- Build a consistent and sustainable culture of performance; and
- Increase the capacity of critical teams to focus on strategic projects and improvement efforts.

Process

- Improve identification, diagnosis, and remediation of end-to-end process pain points; and
- Prioritize process improvement efforts and resource allocation.

Technology

- Provide quantifiable facts and improved data to support business cases for additional technology investments;
- Prioritize the improvement roadmap and identify the need for additional technology functionality and tools; and
- Increase user adoption and support benefit realization ahead of and following the implementation.

13 Risk and Impact Assessment

ESTP is a transformative program that will span 11 years and impact the services and operations of multiple branches. A program of such magnitude carries risks of various types and severity levels, all of which need to be proactively identified, categorized, assessed and documented. In addition, appropriate mitigation strategies need to be in place to ensure that the City can deploy these strategies in a timely manner if any of these risks threatens to occur. Apart from the risks unique to the ESTP solution recommendation, risks around the project itself include those related to the selection, implementation, and adoption of the solution.

The following risk assessment matrix was used to evaluate the severity level associated with each risk that was identified as part of the business case analysis.

Risk Assessment Matrix		Risk Impact		
		Modest	Moderate	Severe
Risk Likelihood	Unlikely	Low	Low	Medium
	Moderately Likely	Low	Medium	High
	Likely	Medium	High	Very High

Figure 18: Risk assessment matrix

The risk severity level - Low, Medium, High, and Very High - was assessed based on two factors, the risk impact that is represented on the horizontal axis, and risk likelihood that is represented on the vertical axis. Risk impact is the financial, timeline, or reputational impact that a risk would have on the program (and on the City) should the risk materialize. The risk impact could be:

- **Modest:** Low financial impact; or a few days of project timeline delay; or negligible reputational harm.
- **Moderate:** Moderate financial impact; or a few weeks of project timeline delay; some reputational harm.
- **Severe:** High financial (> \$100,000) impact; or months of project timeline delay; or considerable reputational harm.

Risk likelihood is the probability of occurrence of a risk. The risk likelihood could be:

- **Unlikely:** The probability of occurrence of a risk is low (<0.25).
- **Moderately Likely:** The probability of occurrence of a risk is moderate (0.25-0.75)
- **Likely:** The probability of occurrence of a risk is high (>0.75)

The key risks identified for the ESTP initiative have been organized into categories - Governance, Standardization, Change Adoption, Resourcing, Technology, Data, Procurement, and Delivery. The following risk assessment map shows where each of the identified risks lies, with a label denoting the category to which the risk belongs.

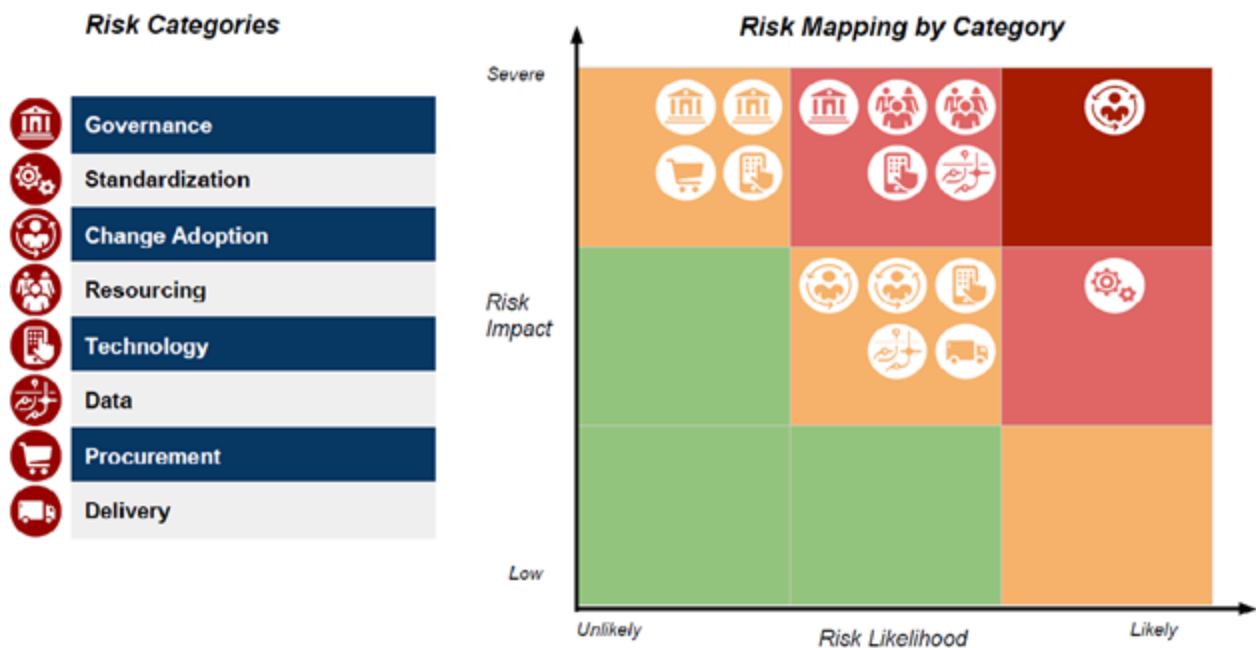


Figure 19: Risk Categories and Risk Mapping by Categories

Detailed risks around each of these categories along with proposed mitigation plans are provided in [Appendix F - Risks and Mitigation Plans](#).

14 Appendix A – Jurisdictional Scan

Some of the national and municipal governments have enabled these new trends through systems modernization coupled with the associated business transformation. There are learnings from each of those stories that the City of Edmonton could adopt; some examples are highlighted in the table below:

Government	Direction Taken	Impact	Learnings
Government of Alberta - Service Alberta	Service Alberta is progressing towards implementation of an SAP Cloud and standardizing its core business processes including Finance, HR, and Supply Chain	Future impacts considered are: <ul style="list-style-type: none"> Better citizen and business experience with better core functional services provided by the Government including grants, management of cases, payrolls and efficient workplace management 	<ul style="list-style-type: none"> Process standardization needs to align with technology standards to reap maximum efficiencies as well as minimize technical customizations
City of Toronto - eCity Modernization Project	City of Toronto has gone ahead with SAP S4/Hana implementation in alignment with its eCity modernization strategy. The project has gone ahead with procurement, finance, HR, payroll and real estate modernization with a mobile strategy in view as well. The project also focuses on standardizing the processes along with technology rationalization.	Project aligns with City of Toronto's eCity strategy and is considered as a strategic project to drive the City in the direction of becoming a smarter city, enhancing citizen and business experience and providing better service value to its customers.	<ul style="list-style-type: none"> Process standardization needs to align with technology standards to reap maximum efficiencies as well as minimize technical customizations Additionally, benefit realization is an ongoing process even after the project completion to ensure processes are further optimized on their path to maturity

Government	Direction Taken	Impact	Learnings
Government of Canada - Project Phoenix	Government of Canada implemented Oracle ERP through a project better known as <i>Project Phoenix</i> .	<ul style="list-style-type: none"> Significant learnings have been realized. Changes to the project have been implemented. 	<ul style="list-style-type: none"> Change management is critical for any project of this magnitude to encourage adoption as well as standardize the way these systems are used Process standardization is a critical need and must accompany technology modernization in order to reap benefits of simple & integrated processes that enhance citizen experience
State of Indiana, United States of America	State of Indiana executed Management and Performance Hub (MPH) project to create a citizen centric IT architecture with SAP S4 HANA so that the state can develop an enterprise-wide data management system that will be used to inform and define state policy.	<ul style="list-style-type: none"> The project improved data quality across all data sources, aggregated that data and performed predictive analytics that informed state policy. It effectively reduced drug abuse and infant mortality rates in the state. 	<ul style="list-style-type: none"> Data governance and quality is critical for informed decision making. Siloed data-sets residing across disparate systems in the City obstruct this goal and have to be integrated to deliver the best value to citizens and define policy that aligns with citizen needs.
Strathcona County and City of Saskatoon	<ul style="list-style-type: none"> Strathcona County and the City of Saskatoon are also moving towards a similar journey as the City of Edmonton and are considering the implementation of an ERP and process transformation. Project is underway to look at standardizing the processes and procuring the ERP system for the transformation with a focus on process standardization and technology implementation as well while aligning the processes to standard OOTB processes. Process standardization along with technology transformation to enhance stakeholder experience and provide a strong foundation for the City's services. 		

15 Appendix B – ESTP Roadmap Prioritization Considerations

Initiative prioritization on the implementation roadmap was performed in consultation with the vendor Subject Matter Experts and the City Stakeholders. The following considerations defined the prioritization exercise:

- The City's existing SAP modules are heavily customized, therefore a greenfield (fresh) deployment of a Core Homogeneous ERP will be required for this program (as migration of existing modules would require significant clean-up);
- The general sequence of a Cloud ERP implementation begins with HR implementation waves for areas that are independent of the existing SAP on premise, such as training and development, position management that provide foundation for core HR functionalities in the next wave.
- Next on the roadmap are Finance ERP implementations waves, running along with Human Resources, Supply Chain and EAM (if included in the scope of the Core Homogeneous ERP) ERP implementations waves. Similar sequencing has been successfully followed by other Canadian municipalities.
- The number of go-lives (i.e. transitions from old to new systems) have been reduced and kept to a cadence that would cause minimal business continuity impact and provides a clear line of sight into the sunset of existing enterprise systems.
- The go-live for Human Resources ERP Wave 2.1 is relatively independent of Finance and Supply Chain Modules because these modules do not have any relative dependencies other than GL Ledger chart of accounts being moved into the new Core Homogeneous ERP solution first (required for payroll, benefits and compensation processing). Some integrations might be needed between the old Learning Management System (LMS) and the Core Homogeneous ERP's Human Capital Management (HCM) Cloud, and PeopleSoft and the Core Homogeneous ERP's Human Capital Management (HCM) Cloud in the interim state, the details for which can be finalized in the ERP solution architecture design initiative;
- Initiatives on the roadmap that depend on the completion of other initiatives appear later on the roadmap timeline (e.g., the ERP Finance modules are dependent on the implementation of a Charts of Accounts, hence the General Ledger module with the Chart of Accounts would be implemented first followed by other Finance modules);
- Some initiatives are best implemented in parallel with other initiatives (e.g., Supply Chain ERP module implementations are closely tied with Finance ERP implementations, therefore, the Supply Chain ERP modules for Inventory and Warehouse Management are implemented in parallel with Finance modules, and they go live at the same time as Finance second go-live – ERP Wave 1.1);
- The procurement window for evaluation and procurement of the ERP solution is eighteen months based on the assumption that the City will need to go to procurement for selecting the ERP vendor based on an ERP evaluation phase. The roadmap shows implementation initiatives from 2020 - 2022. Some of these initiatives may be moved to 2019 based on the City's organizational readiness, interdependencies with ongoing projects and funding availability;
- POSSE Modernization initiatives are generally considered independent of ERP Core initiatives and sequenced as a separate stream; It is expected that there may be some inter-dependencies that may be discovered during the POSSE assessment work;
- The time needed to implement technology modules and process standardization depends on internal and external resources requirements outlined in [Appendix C - Resource Requirements](#);

- As much as possible, the Program spend for the roadmap is spread out over three years to make it easier for the City to plan and budget for the costs associated with the Program;
- The City should validate and refine the prioritization and sequencing of these initiatives with the selected vendor before commencing implementation of the Cloud ERP.

16 Appendix C – Resource Requirements

Stakeholder Group	ERP Preparation <i>January – June 2020</i> <i>(6 Months)</i>	ERP Implementation <i>July 2020 – Dec 2022</i> <i>(30 Months)</i>	Post-Implementation Sustainment <i>January 2023 Onwards</i> <i>(7 Years)</i>
City of Edmonton Leadership	<ul style="list-style-type: none"> ● ESTP Sponsorship ● ESTP Advisory Board ● City of Edmonton Executive Leadership Team ● Business Technology Steering Committee ● Business Technology Working Group <p>Full-Time Equivalent (FTE): 10 percent</p>	<ul style="list-style-type: none"> ● ESTP Sponsorship ● ESTP Advisory Board ● City of Edmonton Executive Leadership Team ● Business Technology Steering Committee ● Business Technology Working Group <p>FTE: 5 percent</p>	<ul style="list-style-type: none"> ● ESTP Advisory Board ● City of Edmonton Executive Leadership Team ● Business Technology Working Group <p>FTE: 5 percent</p>
City of Edmonton Branch Leadership & Staff	<ul style="list-style-type: none"> ● Branch Manager (BM) - Financial Services ● BM - Financial Strategies and Budget ● BM - Employment Services ● BM - Corporate Safety & Employee Health ● BM - Corporate Procurement and Supply Services ● BM - Real Estate <p>FTE: 10 percent</p> <ul style="list-style-type: none"> ● BM - Infrastructure Planning and Design ● BM - Infrastructure Delivery ● BM - Business Planning and Support ● BM - Fleet and Facilities Services ● BM - Parks and Roads Services ● BM - Business Performance and Customer Experience ● BM - Engagement ● BM - Communications ● BM - City Planning ● BM - Corporate Strategy ● BM - Development Services <p>FTE: 2-3 percent</p> <ul style="list-style-type: none"> ● Manager - Communications and Engagement x 1 ● Manager - Procurement x 2 <p>FTE: 50 percent</p>	<ul style="list-style-type: none"> ● BM - Financial Services ● BM - Financial Strategies and Budget ● BM - Employment Services ● BM - Corporate Safety & Employee Health ● BM - Corporate Procurement and Supply Services ● BM - Real Estate <p>FTE: 10 percent</p> <ul style="list-style-type: none"> ● BM - Infrastructure Planning and Design ● BM - Infrastructure Delivery ● BM - Business Planning and Support ● BM - Fleet and Facilities Services ● BM - Parks and Roads Services ● BM - Business Performance and Customer Experience ● BM - Engagement ● BM - Communications ● BM - City Planning ● BM - Corporate Strategy ● BM - Development Services <p>FTE: 2-3 percent</p> <ul style="list-style-type: none"> ● Manager - Communications and Engagement x 1 ● Manager - Procurement x 1 <p>FTE: 50 percent</p>	<ul style="list-style-type: none"> ● BM - Financial Services ● BM - Financial Strategies and Budget ● BM - Employment Services ● BM - Corporate Safety & Employee Health ● BM - Corporate Procurement and Supply Services ● BM - Real Estate <p>FTE: 5 percent</p> <ul style="list-style-type: none"> ● BM - Infrastructure Planning and Design ● BM - Infrastructure Delivery ● BM - Business Planning and Support ● BM - Fleet and Facilities Services ● BM - Parks and Roads Services ● BM - Business Performance and Customer Experience ● BM - Engagement ● BM - Communications ● BM - City Planning ● BM - Corporate Strategy ● BM - Development Services <p>FTE: 2-3 percent</p> <ul style="list-style-type: none"> ● Manager - Communications and Engagement x 1 <p>FTE: 5 percent</p>

Stakeholder Group	ERP Preparation <i>January – June 2020 (6 Months)</i>	ERP Implementation <i>July 2020 – Dec 2022 (30 Months)</i>	Post-Implementation Sustainment <i>January 2023 Onwards (7 Years)</i>
OCT Leadership	<ul style="list-style-type: none"> ● BM - OCT ● Director - Technology Planning ● Senior Leader - Technology Transformation ● Director - Infrastructure Operations ● Director - Business Solutions <p>FTE: 10 percent</p> <ul style="list-style-type: none"> ● Chief Information Security Officer <p>FTE: 25 percent</p>	<ul style="list-style-type: none"> ● BM - OCT ● Director - Technology Planning ● Senior Leader - Technology Transformation ● Director - Infrastructure Operations ● Director - Business Solutions <p>FTE: 10 percent</p> <ul style="list-style-type: none"> ● Chief Information Security Officer <p>FTE: 25 percent</p>	<ul style="list-style-type: none"> ● BM - OCT ● Director - Technology Planning ● Senior Leader - Technology Transformation ● Director - Infrastructure Operations ● Director - Business Solutions <p>FTE: 5 percent</p> <ul style="list-style-type: none"> ● Chief Information Security Officer <p>FTE: 5 percent</p>
OCT Staff	<ul style="list-style-type: none"> ● Enterprise Architect x 1 ● Data Architect x 1 <p>FTE: 100 percent</p> <ul style="list-style-type: none"> ● Manager - SAP x 1 ● Manager - PeopleSoft x 1 ● Manager - POSSE x 1 ● Solution Architect x 1 ● Security Analyst x 1 <p>FTE: 25 percent</p>	<ul style="list-style-type: none"> ● Enterprise Architect x 1 ● Solution Designer x 2 ● Solution Architect x 2 <p>FTE: 100 percent</p> <ul style="list-style-type: none"> ● Application Manager - SAP x 1 ● Application Manager - PeopleSoft x 1 ● Application Manager - POSSE x 1 <p>FTE: 50 percent</p> <ul style="list-style-type: none"> ● Change & Release Manager x 1 ● Environment Manager x 1 <p>FTE: 50 percent</p> <ul style="list-style-type: none"> ● Security Analyst x 1 <p>FTE: 25 percent</p>	<ul style="list-style-type: none"> ● IT Staff <p>FTE: As needed</p>
Core Project Teams (Internal)	<ul style="list-style-type: none"> ● Program Manager x 1 ● Project Manager x 2 ● Business Analyst x 4 ● Change Management x 2 <p>FTE: 100 percent</p>	<ul style="list-style-type: none"> ● Program Manager x 1 ● Project Manager x 4 ● Business Analyst x 8 ● Change Management x 2 <p>FTE: 100 percent</p>	<ul style="list-style-type: none"> ● Program Manager ● Project Manager ● Business Analyst ● Change Management <p>FTE: As needed</p>

Stakeholder Group	ERP Preparation <i>January – June 2020 (6 Months)</i>	ERP Implementation <i>July 2020 – Dec 2022 (30 Months)</i>	Post-Implementation Sustainment <i>January 2023 Onwards (7 Years)</i>
Core Project Teams (External)	<ul style="list-style-type: none"> Consulting Leadership x 1 Functional Consultants x 8 Technical Consultants x 4 Change Management Consultants x 4 <p>FTE: 100 percent</p>	<ul style="list-style-type: none"> Consulting Leadership x 4 Functional Consultants x 12 Technical Consultants x 16^[1] Change Management Consultants x 4 <p>FTE: 100 percent</p>	<ul style="list-style-type: none"> Change Management Consultants x 2 <p>FTE: Ongoing as needed</p>
Functional (Business) Specialists	<ul style="list-style-type: none"> Business Representative - Finance x 4 Business Representative - Human Resources x 4 Business Representative - Health & Safety x 2 Business Representative - CPSS x 2 Business Representative - EAM x 4 Business Representative - POSSE x 4 (across branches) <p>FTE: 25 percent</p>	<ul style="list-style-type: none"> Business Representative - Finance x 4 Business Representative - Human Resources x 6 Business Representative - Health & Safety x 2 Business Representative - CPSS x 2 Business Representative - EAM x 4 Business Representative - Permits & Licensing x 4 Business Representative - Workflows x 4 <p>FTE: 50 percent</p>	<ul style="list-style-type: none"> Business Representative - All Branches <p>FTE: As needed</p>
ERP Internal Support Center (Internal)	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> Team Lead / Manager x 1 Project Manager x 1 Technical and Business Analyst - Finance x 2 Technical and Business Analyst - Human Resources x 2 Technical and Business Analyst - Health & Safety x 1 Technical and Business Analyst - CPSS x 2 Technical and Business Analyst - EAM x 2 Technical Analyst - Change and Release Management x 1 QA Analyst x 1 Knowledge Management Analyst x 1 Enterprise Architect x 1 ERP Architect x 1 <p>Total Resources: 16 FTE: 100 percent (after ERP Internal Support Center Stand-up and resource hiring is complete, expected July-Dec 2021)</p>	<ul style="list-style-type: none"> Team Lead / Manager x 1 Project Manager x 1 Technical and Business Analyst - Finance x 2 Technical and Business Analyst - Human Resources x 2 Technical and Business Analyst - Health & Safety x 1 Technical and Business Analyst - CPSS x 2 Technical and Business Analyst - EAM x 2 Technical Analyst - Change and Release Management x 1 QA Analyst x 1 Knowledge Management Analyst x 1 Enterprise Architect x 1 ERP Architect x 1 <p>Total Resources: 16 FTE: 100 percent</p>

^[1] Quality Assurance, Data conversion team, and Developers are all assumed to be external resources.

17 Appendix D – Mandates and Responsibilities


Committee	Mandate	Responsibilities
Executive Leadership Team	Provide strategic vision and direction to the engagement and aligning expectations for the City Council	<ul style="list-style-type: none"> • Provide guidance from the perspective of the City of Edmonton's mandates and responsibilities; • Understand the needs of the ESTP and work to provide key messages to the employees of the City of Edmonton; • Provides context to the ESTP Advisory Board
Business Technology Steering Committee	The Business Technology Steering Committee is responsible for high-level oversight and guidance to the Business Technology Working Group and represent the ESTP. It will have delegated authority to govern the ESTP based on clear parameters and processes that are accepted by the participants.	<ul style="list-style-type: none"> • Approves all changes to program scope; • Provides the highest-level authority and guidance for the EST Program; • Focuses on the City of Edmonton mandates holistically and determines priorities; • Represents the interests of ESTP stakeholders in the shared ESTP environment; • Provides endorsement and approval for elements requiring executive-level support; • Provides guidance and direction to the ESTP Working Committee as required; • Functions as EST Program Champions; • Resolves escalated issues from the ESTP Working Committee as required
Business Technology Working Group	The Business Technology Working Group is responsible for providing oversight and guidance over the EST Program. The Committee has the delegated authority to govern the EST Program within clear parameters and processes	<ul style="list-style-type: none"> • Provides recommendations to ESTP Steering Committee for strategic level ESTP decisions; • Responsible for the oversight and successful outcome of the ESTP; • Champions an 'Integrated City' approach by leveraging the ESTP to work in common ways with standardized business processes; • Resolves disputes and issues escalated by the EST Program and/or disputes and issues from subordinate groups; • Reviews and drives consensus on decision requests
ESTP Project Advisory Board	The Project Advisory board's mandate is to provide senior operations level advice, decision support and problem solving to the ESTP Working Team. The ESTP Project Advisory Group provides senior level representation on and across the ESP business function is responsible mandate is to provide senior operations level advice and decision support to ensure an integrated and coordinated approach to solving project issues.	<ul style="list-style-type: none"> • Contributes to and supports the ESTP tactical and strategic plans; • Understands and interprets the strategic direction provided by the ESTP Working Committee, and establishes priorities based on the direction; • Endorses funding requests for ESTP scope changes or change requests; • Resolves issues, risks and disputes within the Program Team and/or escalated by program manager;
Working Team	The Working Team is responsible for ensuring alignment with the strategic initiatives. They are responsible for ensuring that the project direction is met and are responsible for the implementation. They ensure that appropriate issues are escalated to the operational team and working committee.	<ul style="list-style-type: none"> • Implements activities that are necessary for transformation in an agile delivery model • Follows the strategic direction that is set by the Operations committee • Escalates issues, risks and disputes within the Program team to the Working and Operations committee

18 Appendix E – High-level Initiative Overviews


18.1 ERP Core Initiatives

ERP Evaluation														
Initiative Description							Dependency on other Initiatives							
<p>ERP Evaluation will be required to ascertain the best core homogenous ERP that fits into the City's architecture landscape. Activities include:</p> <ul style="list-style-type: none">●ERP requirements from core functions including Finance, Human Resources, Corporate Procurement and Supply Chain, and EAM (Real Estate, Fleet & Facility, Parks and Roads) branches at the City●Requirements analysis and consolidation by the project resources●Architectural evaluation and cost evaluation of ERP vendors and contracts●This initiative will be followed by ERP Selection							<ul style="list-style-type: none">●None identified							
Technology Implementation				Process Standardization			Costing Requirements							
<ul style="list-style-type: none">●Not Applicable				<ul style="list-style-type: none">●Not Applicable			<ul style="list-style-type: none">●Internal: \$400-600K●External: \$250-350K (~12 weeks)							
Resource Requirements														
Process Resources			Technology Resources				Program Resources							
Internal		External	Internal		External		Internal			External				
<ul style="list-style-type: none">●Finance x 4 (10%)●HR x 4 (10%)●EH&S x 2 (10%)●CPSS x 2 (10%)●EAM x 3 (10%)		<ul style="list-style-type: none">●NA	<ul style="list-style-type: none">●NA		<ul style="list-style-type: none">●NA		<ul style="list-style-type: none">●PM x 1 (50%)●BA x 2 (100%)●Enterprise Architect x 1 (10%)●OCT Operations Lead x 1 (10%)●Security Lead x 1 (5%)●Security Analyst x 1 (5%)			<ul style="list-style-type: none">●Project Manager (PM) x 1 (100%) - 12 weeks●Business Analyst (BA) x 2 (100%) - 12 weeks				
Initiative Timeline			2019				2020				2021			
			Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (48 weeks)														

ERP Procurement/Selection

Initiative Description					Dependency on other Initiatives									
ERP Selection will be required to select the vendor(s) who will be responsible for the design, configuration and implementation of the ERP solution. Activities include: <ul style="list-style-type: none">•An regular procurement process where an RFP is written to incorporate the business requirements, and inputs are consolidated from various representative on the procurement selection team•Evaluation criteria definition with inputs from the selection team and/or other standard criteria followed by the City for its procurement processes•Selection of the vendor based on the criteria outlined•Negotiation details related to timelines, resourcing and pricing, and finalizing the contract•Procurement of ERP licenses post contract negotiations (if needed)					●ERP Evaluation Initiative									
Technology Implementation			Process Standardization		Costing Requirements									
●Not Applicable			●Not Applicable		●Internal: \$300-400K									
Resource Requirements														
Process Resources			Technology Resources			Program Resources								
Internal		External	Internal		External	Internal		External						
●Finance x 2 (10%) ●HR x 2 (10%) ●EH&S x 1 (10%) ●CPSS x 1 (10%) ●EAM x 1 (10%)		●NA	●NA		●NA	●PM x 1 (20%) ●BA x 1 (50%) ●CPSS Staff x 2 (50%) ●Enterprise Architect x 1 (10%) ●OCT Operations Lead x 1 (10%) ●Security Lead x 1 (5%) ●Security Analyst x 1 (5%)		●NA						
Initiative Timeline			2020		2021			2022						
			Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (24 weeks)														

ERP Data Clean-up

Initiative Description					Dependency on other Initiatives									
ERP Data Clean-up should be performed to ensure that the existing ERP data currently residing in the on-premise SAP and PeopleSoft systems is ready for use (wherever needed) in the new Cloud ERP. Activities include: <ul style="list-style-type: none">Identifying data model required in the new ERP and map core data elements (master data) that will be required to move to the new ERPConverting / preparing data elements into the right format for the new data model - migrate using automated migration paths / some manual efforts may be neededFollow industry standards for data clean-up prior to out-of-the-box ERP implementations					●None identified									
Technology Implementation			Process Standardization			Costing Requirements								
●Not Applicable			●Not Applicable			●Internal: \$20-30K ●External: \$500-750K								
Resource Requirements														
Process Resources			Technology Resources				Program Resources							
Internal		External	Internal		External		Internal		External					
● NA		● NA	●OCT SolutionArchitect X1 (50%)		● Data Management Lead x (100%) ● Data Analyst x 2 (100%) ● QA x 1 (100%)		● PM x 1 (20%) ● OCT Operations Lead x 1 (10%)		● Project Manager x 1 (100%)					
Initiative Timeline			2019				2020				2021			
			Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (12 weeks)														


ERP Solution Architecture

Initiative Description					Dependency on other Initiatives								
ERP Solution Architecture will be required for the architectural design of the future state ERP solution and its key interactions with other systems such as GIS, Tririga, CRM through the Systems Integration Layer (SIL). The solution architecture for these major systems (ERP and other major systems) should be designed to ensure that the City's current (e.g. well integrated systems for reporting) and possible future needs (e.g. systems scalability, Identity and Access Management (IAM) implementation) are incorporated at the onset from an architecture standpoint.					•None identified								
Technology Implementation		Process Standardization			Costing Requirements								
•Not Applicable		•Not Applicable			•Internal: \$8-12K •External: \$60-80K								
Resource Requirements													
Process Resources		Technology Resources			Program Resources								
Internal	External	Internal	External		Internal	External							
• NA	• NA	•Solution Architect x 1 (20%)	•Solution Architect x 1 (100%)		•Enterprise Architect x 1 (10%)	• NA							
Initiative Timeline		2019			2020			2021					
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (12 weeks)													


Systems Integration Layer (SIL) Evaluation

Initiative Description					Dependency on other Initiatives									
<p>SIL Evaluation will be required to the best fit systems integration solution that fits into the City's architecture landscape. Activities include:</p> <ul style="list-style-type: none">●SIL requirements from technical and architecture resources at the City.●Requirements analysis and consolidation by the project resources●Evaluation of cost and benefits for SIL vendors (with possible demos)●This initiative will be followed by SIL Selection					●None identified									
Technology Implementation			Process Standardization			Costing Requirements								
●Not Applicable			●Not Applicable			●Internal: \$30-50K ●External: \$130-180K								
Resource Requirements														
Process Resources			Technology Resources				Program Resources							
Internal		External	Internal		External	Internal		External						
● NA		● NA	● NA		● NA	● PM x 1 (50%) ● BA x 1 (50%) ● Enterprise Architect x 1 (10%) ● OCT Operations Lead x 1 (10%) ● Security Lead x 1 (5%) ● Security Analyst x 1 (5%)		● Project Manager (PM) x 1 (50%) ● Business Analyst (BA) x 1 (100%)						
Initiative Timeline			2020				2021				2022			
			Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (12 weeks)														

Systems Integration Layer (SIL) Procurement/Selection

Initiative Description				Dependency on other Initiatives					
SIL Selection will be required to select the vendor who will be the provider of the SIL solution. Activities include: <ul style="list-style-type: none">•An regular procurement process where an RFP is written to incorporate the technical requirements, and inputs are consolidated from various representative on the procurement selection team•Evaluation criteria definition with inputs from the selection team and/or other standard criteria followed by the City for its procurement processes•Selection of the vendor based on the criteria outlined•Negotiation details related to timelines, resourcing and pricing, and finalizing the contract•Procurement of SIL licenses post contract negotiations (if needed)				•SIL Evaluation Initiative					
Technology Implementation		Process Standardization		Costing Requirements					
•Not Applicable		•Not Applicable		•Internal: \$100-120K					
Resource Requirements									
Process Resources		Technology Resources		Program Resources					
Internal	External	Internal	External	Internal	External	Internal	External		
• NA	• NA	• NA	• NA	• PM x 1 (20%) • BA x 1 (50%) • CPSS Staff x 2 (25%) • Enterprise Architect x 1 (10%) • OCT Operations Lead x 1 (10%) • Security Lead x 1 (5%) • Security Analyst x 1 (5%)	• NA				
Initiative Timeline		2020		2021		2022			
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (24 weeks)									

ERP Wave 1.1 - Finance

Initiative Description					Dependency on other Initiatives									
<p>ERP Wave 1.1 - Finance will be the first major ERP wave required to implement the new Cloud ERP technology and related process standardization for Finance functions. Activities include:</p> <ul style="list-style-type: none">•Technology implementation for General Ledger, Inventory Management (Treasury), Accounts Receivable, Accounts Payable, Capital and Operating Budget, Funds Management, Inventory Management, Sales & Distribution, and Forecasting & Reporting on the Core Homogenous Cloud ERP Finance modules•Standardization of processes related to the above functions within the Finance Branches•Future state organization structure and operating model design (including governance model design) to feed into the overall operating model for the two Finance branches					<ul style="list-style-type: none">•ERP Selection•ERP Data Clean-up•ERP Solution Architecture									
Technology Implementation			Process Standardization		Costing Requirements									
<ul style="list-style-type: none">•OOTB implementation, data conversion, cleanup and migration, and go live of ERP modules for:<ul style="list-style-type: none">o General Ledgero Treasuryo AR and APo Capital & Operating Budgeto Fund Managemento Inventory Managemento Sales & Distributiono Forecasting & Reporting			<ul style="list-style-type: none">•Implement vendor provided standard processes for all Finance functions (modules) defined in the technology implementation box•Standardize processes till the L5 level•Future org structure and operating model design		<ul style="list-style-type: none">•Internal: \$600-800K•External: \$7000-8500K									
Resource Requirements														
Process Resources			Technology Resources			Program Resources								
Internal		External	Internal		External	Internal			External					
<ul style="list-style-type: none">• Process Owner x 2 (25%)• Business Representative x 4 (50%)		<ul style="list-style-type: none">• Functional Business Analyst x 4 (50%)	<ul style="list-style-type: none">• Solution Designer x 1 (20%)• Solution Architect x 1 (40%)• Change/Release Lead x 1 (10%)• Environment Mngnr x 1 (10%)		<ul style="list-style-type: none">• Technical Lead x 4 (100%)• Tech Analyst x 4 (100%)• Data Analyst x 1 (100%)• QA Lead x 1 (100%)• QA Analyst x 2 (50%)	<ul style="list-style-type: none">• Leadership –OCT and Finance x 8 (2%)• OCT Ops Lead x 1 (20%)• EA x 1 (20%)• PM x 1 (40%)• Security Lead x1 (10%)• Security Analyst x1 (10%)			<ul style="list-style-type: none">• Leadership x 2 (10%)• Project Manager x 1 (100%)					
Initiative Timeline			2020		2021		2022							
			Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (60 weeks)														

Finance Stabilize and Adopt Wave

Initiative Description					Dependency on other Initiatives								
Finance Stabilize and Adopt wave will be required after the implementation of all Finance ERP modules to ensure that the product is stable and working as intended. Any technical changes required to the product will be incorporated in this wave.					●ERP Selection ●ERP Data Clean-up ●ERP Solution Architecture ●ERP Wave 1.1 - Finance								
Technology Implementation		Process Standardization			Costing Requirements								
●Stabilization and adoption of all FinanceCloudERP modules after implementation and go live		●NA			●External: \$400-500K								
Resource Requirements													
Process Resources		Technology Resources			Program Resources								
Internal ● NA		External ● NA		Internal ● NA			External ● Tech Analyst x 4 (100%)		Internal ● NA		External ● Project Manager x 1 (10%)		
Initiative Timeline		2020				2021				2022			
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (12 weeks)		<div></div>											


Systems Integration Layer (SIL) Wave 1 – ERP Finance Integrations

Initiative Description					Dependency on other Initiatives									
<p>SIL Wave 1 – ERP Finance Integrations will be the first major wave required to integrate between the ERP and other ERP feeder applications at the City. Activities include:</p> <ul style="list-style-type: none">●Defining the scope of feeder applications for which integrations would be required to the ERP Finance modules●Designing integration details such as (e.g. API architecture, detailed API design) to enable the integrations between systems●Development, testing, and deployment of the integrations					<ul style="list-style-type: none">●ERP Selection●ERP Data Clean-up●ERP Solution Architecture●SIL Evaluation and Procurement									
Technology Implementation		Process Standardization			Costing Requirements									
<ul style="list-style-type: none">●ERP feeder systems and Finance modules APIs architecture●Detailed API design for data exchange●Development, testing and deployment integrations to feeder applications using the SIL platform		<ul style="list-style-type: none">●NA			<ul style="list-style-type: none">●Internal: \$110-150K●External: \$600-700K									
Resource Requirements														
Process Resources			Technology Resources				Program Resources							
Internal		External	Internal		External		Internal		External					
● NA		● NA	<ul style="list-style-type: none">● OCT Ops Lead x 1 (10%)● EA x 1 (10%)● Solution Designer x 1 (20%)● Solution Architect x 1 (20%)● Change/Release Lead x 1 (5%)● Environment Mng'r x 1 (5%)		<ul style="list-style-type: none">● Technical Lead x 1 (20%)● Tech Analyst x 2 (50%)● QA Lead x 1 (33%)● QA Analyst x 1 (33%)		<ul style="list-style-type: none">● PM x 1 (20%)● Security Lead x 1 (5%)● Security Analyst x 1 (5%)		<ul style="list-style-type: none">● Leadership x 2 (5%)● Project Manager x 1 (20%)					
Initiative Timeline			2020				2021				2022			
			Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (48 weeks)														

ERP Wave 2.1 – Human Resources

Initiative Description						Dependency on other Initiatives								
<p>ERP Wave 2.1 - Human Resources will be the first major ERP wave required to implement the new Cloud ERP technology and related process standardization for Human Resources functions. Activities include:</p> <ul style="list-style-type: none">● Configuration, testing and deployment of Core Homogenous ERP Cloud ERP modules for HR functions – Training & Development, Position Management, and Workforce Administration –based on inputs from HR business requirements documentation and business representatives● Standardization of processes related to the above functions within the Human Resources branch● Future state organization structures and operating model design (including governance model design), to feed into the overall operating model for the Human Resources branch						<ul style="list-style-type: none">● ERP Selection● ERP Data Clean-up● ERP Solution Architecture								
Technology Implementation			Process Standardization			Costing Requirements								
<ul style="list-style-type: none">● OOTB implementation, data conversion, cleanup and migration, and go live of ERP modules for:<ul style="list-style-type: none">○ Training & Development○ Workforce Administration○ Position Management			<ul style="list-style-type: none">● Implement vendor provided standard processes for the Human Resources functions (modules) defined in the technology implementation box● Standardize processes till the L5 level● Future org structures and operating model design			<ul style="list-style-type: none">● Internal: \$800-1000K● External: \$2800-3500K								
Resource Requirements														
Process Resources			Technology Resources				Program Resources							
Internal <ul style="list-style-type: none">● Process Owner x 4 (25%)● Business Representative x 8 (50%)		External <ul style="list-style-type: none">● Functional Business Analyst x 8 (50%)	Internal <ul style="list-style-type: none">● Solution Designer x 1 (100%)● Solution Architect x 1 (80%)● Change/Release Lead x 1 (20%)● Environment Mng'r x 1 (20%)		External <ul style="list-style-type: none">● Technical Lead x 3 (20%)● Tech Analyst x 3 (50%)● Data Analyst x 2 (50%)● QA Lead x 1 (50%)● QA Analyst x 2 (50%)		Internal <ul style="list-style-type: none">● Leadership –OCT and HR x 6 (2%)● PM x 1 (80%)● OCT Ops Lead x 1 (40%)● EA x 1 (40%)● Security Lead x1 (10%)● Security Analyst x1 (10%)			External <ul style="list-style-type: none">● Leadership x 2 (10%)● Project Manager x 1 (100%)				
Initiative Timeline			2020				2021				2022			
			Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (40 weeks)			<div></div>											

ERP Wave 2.2 – Human Resources

Initiative Description						Dependency on other Initiatives								
<p>ERP Wave 2.2 – Human Resources will be the second major ERP wave required to implement the new Cloud ERP technology and related process standardization for HR functions. Activities include:</p> <ul style="list-style-type: none">● Configuration, testing and deployment of Core Homogenous Cloud ERP modules for HR functions – Compensation, Payroll, Pensions & Benefits, Time & Attendance Management, Performance Management, Talent & Succession Management – based on inputs from HR business requirements documentation and business representatives● Standardization of processes related to the above functions within the Human Resources branch● Future state operating model design, including for the governance model, to feed into the overall operating model for the Human Resources branch						<ul style="list-style-type: none">● ERP Selection● ERP Data Clean-up● ERP Solution Architecture● ERP Wave 2.1 – Human Resources								
Technology Implementation			Process Standardization			Costing Requirements								
<ul style="list-style-type: none">● OOTB implementation, data conversion, cleanup and migration, and go live of ERP modules for:<ul style="list-style-type: none">○ Compensation, Payroll,○ Pensions & Benefits○ Time & Attendance Management○ Performance Management○ Talent & Succession Management			<ul style="list-style-type: none">● Implement vendor provided standard processes for the Human Resources functions (modules) defined in the technology implementation box● Standardize processes till the L5 level● Future operating and governance model design			<ul style="list-style-type: none">● Internal: \$700-900K● External: \$4000-5000K								
Resource Requirements														
Process Resources			Technology Resources				Program Resources							
Internal <ul style="list-style-type: none">● Process Owner x 4 (20%)● Business Representative x 8 (40%)		External <ul style="list-style-type: none">● Functional Business Analyst x 8 (50%)	Internal <ul style="list-style-type: none">● Solution Designer x 1 (100%)● Solution Architect x 1 (80%)● Change/Release Lead x 1 (20%)● Environment Mngnr x 1 (20%)		External <ul style="list-style-type: none">● Technical Lead x 4 (50%)● Tech Analyst x 4 (100%)● Data Analyst x 2 (50%)● QA Lead x 1 (50%)● QA Analyst x 2 (50%)		Internal <ul style="list-style-type: none">● Leadership –OCT and HR x 8 (2%)● OCT Ops Lead x 1 (20%)● EA x 1 (20%)● PM x 1 (50%)● Security Lead x1 (10%)● Security Analyst x1 (10%)			External <ul style="list-style-type: none">● Leadership x 2 (10%)● Project Manager x 1 (100%)				
Initiative Timeline			2020				2021				2022			
			Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (44 weeks)														

ERP Wave 2.3 – Human Resources and Employee Health & Safety (EH&S)

Initiative Description					Dependency on other Initiatives									
<p>ERP Wave 2.3 - HR and EH&S will be the final major ERP wave required to implement the new Cloud ERP technology and related process standardization for HR and EH&S functions. Activities include:</p> <ul style="list-style-type: none">● Configuration, testing and deployment of Core Homogenous Cloud ERP modules for HR and EH&S functions - Incident, Investigations, and Case Management, Attraction & Recruitment Management, Onboarding & Offboarding Management, Disability Management, and Occupational Health & Safety Management - based on inputs from HR and EH&S business requirements documentation and business representatives● Standardization of processes related to the above functions within the Human Resources and EH&S branches● Future state operating model design, including for the governance model, to feed into the overall operating model for the Human Resources branch					<ul style="list-style-type: none">● ERP Selection● ERP Data Clean-up● ERP Solution Architecture● ERP Wave 2.1 – Human Resources● ERP Wave 2.2 – Human Resources									
Technology Implementation			Process Standardization			Costing Requirements								
<ul style="list-style-type: none">● OOTB implementation, data conversion, cleanup and migration, and go live of ERP modules for:<ul style="list-style-type: none">○ Incident, Investigations, and Case Management○ Onboarding & Offboarding Management○ Attraction & Recruitment Management○ Disability Management○ Occupational Health & Safety Mgmt.			<ul style="list-style-type: none">● Implement vendor provided standard processes for the Human Resources functions (modules) defined in the technology implementation box● Standardize processes till the L5 level● Future operating and governance model design			<ul style="list-style-type: none">● Internal: \$1100-1500K● External: \$3600-4500K								
Resource Requirements														
Process Resources			Technology Resources				Program Resources							
Internal		External	Internal		External		Internal			External				
<ul style="list-style-type: none">● Process Owner x 5 (25%)● Business Representative x 10 (50%)		<ul style="list-style-type: none">● Functional Business Analyst x 10 (50%)	<ul style="list-style-type: none">● Solution Designer x 1 (100%)● Solution Architect x 1 (80%)● Change/Release Lead x 1 (20%)● Environment Mng'r x 1 (20%)		<ul style="list-style-type: none">● Technical Lead x 4 (50%)● Tech Analyst x 4 (100%)● Data Analyst x 2 (50%)● QA Lead x 1 (50%)● QA Analyst x 2 (50%)		<ul style="list-style-type: none">● Leadership – OCT and HR/EH&S x 10 (2%)● OCT Ops Lead x 1 (40%)● EA x 1 (40%)● PM x 1 (100%)● Security Lead x 1 (10%)● Security Analyst x 1 (10%)			<ul style="list-style-type: none">● Leadership x 2 (10%)● Project Manager x 1 (100%)				
Initiative Timeline			2020				2021				2022			
			Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (44 weeks)														

HR and EH&S Stabilize and Adopt Waves

Initiative Description					Dependency on other Initiatives									
Three HR and EH&S Stabilize and Adopt waves will be required after the implementation of each HR and/or EH&S ERP modules to ensure that the product is stable and working as intended. Any technical changes required to the product will be incorporated in this wave.					<ul style="list-style-type: none">●ERP Selection●ERP Data Clean-up●ERP Solution Architecture●ERP Wave 2.1, 2.2 and 2.3 (HR and EH&S ERP Waves)									
Technology Implementation			Process Standardization			Costing Requirements								
●Stabilization and adoption of HR and EH&S Cloud ERP modules after implementation and go live			●NA			●External: \$150-200K for Wave 1; \$450-550K for Wave 2; and \$220-300K for Wave 3								
Resource Requirements														
Process Resources			Technology Resources					Program Resources						
Internal		External	Internal		External			Internal		External				
● NA		● NA	● NA		<ul style="list-style-type: none">● Wave 1 - Tech Analyst x 1.5 (100%)● Wave 2 - Tech Analyst x 4.5 (100%)● Wave 3 - Tech Analyst x 2.25 (100%)			● NA		<ul style="list-style-type: none">● Wave 1 - PM x 1 (10%)● Wave 2 - PM x 1 (10%)● Wave 3 - PM x 1 (10%)				
Initiative Timeline			2021				2022				2023			
			Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (12 weeks each)			Wave 1				Wave 2				Wave 3			


SIL Wave 2 – ERP HR and EH&S Integrations

Initiative Description					Dependency on other Initiatives					
<p>SIL Wave 2 – ERP HR and EH&S Integrations will be the second major wave required to integrate ERP HR and EH&S modules and other ERP feeder applications at the City. Activities include:</p> <ul style="list-style-type: none">Defining the scope of feeder applications for which integrations would be required to the ERP HR and EH&S modulesDesigning integration details such as (e.g. API architecture, detailed API design) to enable the integrations between systemsDevelopment, testing, and deployment of the integrations					<ul style="list-style-type: none">ERP SelectionERP Data Clean-upERP Solution ArchitectureSIL Evaluation and Procurement					
Technology Implementation			Process Standardization		Costing Requirements					
<ul style="list-style-type: none">ERP feeder systems and ERP HR and EH&S modules APIs architectureDetailed API design for data exchangeDevelopment, testing and deployment integrations to feeder applications using the SIL platform			<ul style="list-style-type: none">NA		<ul style="list-style-type: none">Internal: \$170-250KExternal: \$1100-1600K					
Resource Requirements										
Process Resources			Technology Resources			Program Resources				
Internal		External	Internal		External	Internal		External		
<ul style="list-style-type: none">NA		<ul style="list-style-type: none">NA	<ul style="list-style-type: none">OCT Ops Lead x 1 (10%)EA x 1 (10%)Solution Designer x 1 (20%)Solution Architect x 1 (20%)Change/Release Lead x 1 (5%)Environment Mng'r x 1 (5%)		<ul style="list-style-type: none">Technical Lead x 1 (20%)Tech Analyst x 2 (50%)QA Lead x 1 (33%)QA Analyst x 1 (33%)	<ul style="list-style-type: none">PM x 1 (20%)Security Lead x 1 (5%)Security Analyst x 1 (5%)		<ul style="list-style-type: none">Leadership x 2 (5%)Project Manager x 1 (20%)		
Initiative Timeline			2020		2021		2022			
			Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (78 weeks)										


ERP Wave 3 – Supply Chain Management (SCM)

Initiative Description					Dependency on other Initiatives								
<p>ERP Wave 3 – SCM will be the only ERP wave required to implement Cloud ERP and related process standardization for the Supply Chain (CPSS) functions, except the ones already covered by SAP Ariba implementation. Activities include:</p> <ul style="list-style-type: none">• Configuration, testing and deployment of technology solution for Inventory and Warehouse Management on the Core Homogenous Cloud ERP Supply Chain modules• Standardization of processes related to the above functions within the CPSS branch• Future state operating model design, including for the governance model, to feed into the overall operating model for the CPSS branch					<ul style="list-style-type: none">• ERP Selection• ERP Data Clean-up• ERP Solution Architecture								
Technology Implementation		Process Standardization			Costing Requirements								
<ul style="list-style-type: none">• OOTB implementation, data conversion, cleanup and migration, and go live of ERP modules for:<ul style="list-style-type: none">o Inventory Managemento Warehouse Management		<ul style="list-style-type: none">• Implement vendor provided standard processes for the CPSS functions (modules) defined in the technology implementation box• Standardize processes till the L5 level• Future operating and governance model design			<ul style="list-style-type: none">• Internal: \$120-180K• External: \$800-1200K								
Resource Requirements													
Process Resources		Technology Resources			Program Resources								
Internal	External	Internal	External		Internal	External							
<ul style="list-style-type: none">• Process Owner x 2 (10%)• Business Representative x 2 (50%)	<ul style="list-style-type: none">• Functional Business Analyst x 2 (50%)	<ul style="list-style-type: none">• Solution Designer x 1 (40%)• Solution Architect x 1 (20%)• Change/Release Lead x 1 (5%)• Environment Mng'r x 1 (5%)	<ul style="list-style-type: none">• Technical Lead x 1 (20%)• Tech Analyst x 3 (50%)• Data Analyst x 1 (20%)• QA Lead x 1 (10%)• QA Analyst x 1 (50%)		<ul style="list-style-type: none">• Leadership – OCT and CPSS x 5 (2%)• PM x 1 (20%)• OCT Ops Lead x 1 (10%)• EA x 1 (10%)• Security Lead x 1 (5%)• Security Analyst x 1 (5%)	<ul style="list-style-type: none">• Leadership x 2 (5%)• Project Manager x 1 (50%)							
Initiative Timeline		2020				2021				2022			
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (40 weeks)													


SCM Stabilize and Adopt Wave


Initiative Description						Dependency on other Initiatives								
SCM Stabilize and Adopt wave will be required after the implementation of inventory and warehouse management ERP modules to ensure that the product is stable and working as intended. Any technical changes required to the product will be incorporated in this wave.						●ERP Selection ●ERP Data Clean-up ●ERP Solution Architecture ●ERP Wave 3 - SCM								
Technology Implementation			Process Standardization			Costing Requirements								
●Stabilization and adoption of inventory and warehouse management ERP modules after implementation and go live			●NA			●External: \$150-200K								
Resource Requirements														
Process Resources			Technology Resources			Program Resources								
Internal		External	Internal		External	Internal		External						
● NA		● NA	● NA		●Tech Analyst x 1.5 (100%)	● NA		● Project Manager x 1 (10%)						
Initiative Timeline			2020				2021				2022			
			Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (12 weeks)														

SIL Wave 3 – ERP SCM Integrations


Initiative Description					Dependency on other Initiatives									
<p>SIL Wave 3 – ERP SCM Integrations will be the first major wave required to integrate ERP Supply Chain modules, SAP Ariba, and other ERP feeder applications at the City. Activities include:</p> <ul style="list-style-type: none">Defining the scope of feeder applications for which integrations would be required to the ERP Supply Chain modulesDesigning integration details such as (e.g. API architecture, detailed API design) to enable the integrations between systemsDevelopment, testing, and deployment of the integrations					<ul style="list-style-type: none">ERP SelectionERP Data Clean-upERP Solution ArchitectureSIL Evaluation and Procurement									
Technology Implementation			Process Standardization		Costing Requirements									
<ul style="list-style-type: none">ERP feeder systems and ERP SCM (and SAP Ariba) modules APIs architectureDetailed API design for data exchangeDevelopment, testing and deployment integrations to feeder applications using the SIL platform			<ul style="list-style-type: none">NA		<ul style="list-style-type: none">Internal: \$70-90KExternal: \$350-450K									
Resource Requirements														
Process Resources			Technology Resources				Program Resources							
Internal		External	Internal		External		Internal		External					
<ul style="list-style-type: none">NA		<ul style="list-style-type: none">NA	<ul style="list-style-type: none">OCT Ops Lead x 1 (10%)EA x 1 (10%)Solution Designer x 1 (20%)Solution Architect x 1 (20%)Change/Release Lead x 1 (5%)Environment Mngr x 1 (5%)		<ul style="list-style-type: none">Technical Lead x 1 (20%)Tech Analyst x 2 (50%)QA Lead x 1 (33%)QA Analyst x 1 (33%)		<ul style="list-style-type: none">PM x 1 (20%)Security Lead x 1 (5%)Security Analyst x 1 (5%)		<ul style="list-style-type: none">Leadership x 2 (5%)Project Manager x 1 (20%)					
Initiative Timeline			2020				2021				2022			
			Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (30 weeks)														

18.2 EAM Rationalization and Rollout Initiatives

EAM Governance Set-up														
Initiative Description							Dependency on other Initiatives							
<p>The rationalization and preparation of Enterprise Asset Management at the City will require this initiative in designing, formalizing and operationalizing governance mechanisms between Real Estate, Fleet and Facilities, and Parks & Roads business branches and other Corporate branches at the City. Activities include:</p> <ul style="list-style-type: none">• A detailed assessment of existing EAM governance mechanisms at the City;• Designing EAM governance model for City aligned with leading industry practice; and• Documenting business requirements for considerations in EAM tool rationalization							<ul style="list-style-type: none">• ERP Evaluation Initiative							
Technology Implementation			Process Standardization				Costing Requirements							
•Not Applicable			•Not Applicable				<ul style="list-style-type: none">•Internal: \$10-12K•External: \$80-110K							
Resource Requirements														
Process Resources			Technology Resources				Program Resources							
Internal		External	Internal		External		Internal		External					
• NA		• NA	• NA		• NA		• PM x 1 (10%)		<ul style="list-style-type: none">• PM x 1 (10%)• Business Analyst x 1 (20%)• OCM Analyst x 1 (20%)					
Initiative Timeline			2020				2021				2022			
			Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (24 weeks)														

EAM Tool Rationalization														
Initiative Description						Dependency on other Initiatives								
<p>EAM Tool Rationalization that will include necessary analysis across the branches that consume and provide asset management services (including Fleet & Facilities, Parks & Roads, and Real Estate) to provide the City with a recommendation on:</p> <ul style="list-style-type: none">• whether they should keep their Operational Asset Management capabilities in a separate system of record (i.e. IBM Tririga) which would require them to configure and use that system for Financial Asset Management and creates a need for integrations with Core Homogenous Cloud ERP; or• whether they should move their Operational Asset Management capabilities into Core ERP (i.e. ERP RE, ERP PM) which would require them to configure and use ERP platform for Financial Asset Management and does not require additional integrations; (Note: The City should use same systems (Core ERP Cloud or IBM Tririga) for both Financial and Operational Asset Management Capabilities to avoid confusion on the system of record for Asset Management); and• identify the best-fit system for Integrated Workplace Management (IWMS) capabilities.						<ul style="list-style-type: none">• ERP Evaluation Initiative• EAM Governance Set-up								
Technology Implementation			Process Standardization			Costing Requirements								
• Not Applicable			• Not Applicable			<ul style="list-style-type: none">• Internal: \$60 - 80K• External: \$350 - 450K								
Resource Requirements														
Process Resources			Technology Resources				Program Resources							
Internal		External	Internal		External	Internal			External					
• Process Owner - EAM x 3 (10%) • Senior Business Rep - EAM x 3 (20%)		• EAM Process Lead x 1 (50%)	• NA		• EAM Technology Lead x 1 (50%)	• PM x 1 (20%) • BA x 1 (100%) • OCT Ops Lead x 1 (10%) • EA x 1 (10%)			• PM x 1 (100%) • BA x 1 (100%)					
Initiative Timeline			2020				2021				2022			
			Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (24 weeks)														

ERP Wave 4.1 – EAM Rollout

Initiative Description					Dependency on other Initiatives								
<p>ERP Wave 4.1 – EAM Rollout will be the fourth major ERP wave required to implement the new Cloud ERP technology and related process standardization. Activities include:</p> <ul style="list-style-type: none">•Technology implementation for Project and Portfolio Management (PPM); EAM Asset (Portfolio) Management, Asset Design and Procurement, and Asset Disposal on Core Homogenous Cloud ERP, or a different tool, depending on the results of the EAM Tool Rationalization initiative;•Process standardization, and service delivery and governance model design will occur in parallel for those capabilities (functions) at the in-scope branches (Real Estate, Fleet & Facilities, and Parks & Roads); and•Future state operating model design following from for the governance set-up will be implemented along with policy design and process standardization.					<ul style="list-style-type: none">•EAM Governance Set-up•EAM Tool Rationalization•ERP Solution Architecture								
Technology Implementation		Process Standardization			Costing Requirements								
<ul style="list-style-type: none">•OOTB implementation, data migration and clean-up, and go live of ERP modules for:<ul style="list-style-type: none">◦ PPM◦ Asset Design & Procurement◦ Asset Management◦ Asset Disposal		<ul style="list-style-type: none">•Implement vendor provided standard processes for PPM, Asset Management, Asset Design & Procurement, and Asset Disposal processes			<ul style="list-style-type: none">•Internal: \$240-260K•External: \$900-1200K								
Resource Requirements													
Process Resources		Technology Resources				Program Resources							
Internal <ul style="list-style-type: none">•Process Owner x 4 (10%)•Business Representative x 8 (25%)	External <ul style="list-style-type: none">•Process Lead x 1 (25%)•Functional Business Analyst x 2 (50%)•Functional Business SME x 1 (100%)	Internal <ul style="list-style-type: none">•Change/Release Lead X 1 (5%)•Environment Mng'r x 1 (5%)•Solution Designer x 1 (10%)•Solution Designer x 3 (25%)•Solution Architect x 2 (10%)•Solution Architect x 2 (20%)	External <ul style="list-style-type: none">•Technical Lead x 2 (25%)•BA x 6 (33%)•Data Analyst x 4 (25%)•QA Lead x 2 (25%)•QA Analyst x 2 (25%)		Internal <ul style="list-style-type: none">•PM x 1 (20%)•OCT Ops Lead x 1 (10%)•Enterprise Architect x 1 (10%)	External <ul style="list-style-type: none">•Leadership x 2 (5%)•PM x 1 (50%)							
Initiative Timeline		2020				2021				2022			
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (36 weeks)													

ERP Wave 4.2 – EAM Rollout

Initiative Description					Dependency on other Initiatives								
<p>ERP Wave 4.2 – EAM Rollout will be the fourth major ERP wave required to implement the new Cloud ERP technology and related process standardization. Activities include:</p> <ul style="list-style-type: none">●Technology implementation for Work Management, Asset Management and Asset Operations on the selected system depending on the results of the EAM Tool Rationalization initiative;●Process standardization, and service delivery and governance model design will occur in parallel for those capabilities (functions) at the in-scope branches (Real Estate, Fleet & Facilities, and Parks & Roads); and●Future state operating model design following from for the governance set-up will be implemented along with policy design and process standardization.					<ul style="list-style-type: none">●EAM Governance Set-up●EAM Tool Rationalization●ERP Solution Architecture●ERP Wave 4.1 – EAM Rollout								
Technology Implementation		Process Standardization			Costing Requirements								
<ul style="list-style-type: none">●OOTB implementation, data migration and clean-up, and go live of ERP modules for:<ul style="list-style-type: none">○ Work Management○ Asset Operations○ Asset Maintenance		<ul style="list-style-type: none">●Implement vendor provided standard processes for Work Management, Asset Maintenance and Asset Operations			<ul style="list-style-type: none">●Internal: \$260-300K●External: \$1200-1500K								
Resource Requirements													
Process Resources		Technology Resources				Program Resources							
Internal	External	Internal		External		Internal		External					
<ul style="list-style-type: none">●Process Owner x 6 (25%)●Business Representative x 3 (10%)	<ul style="list-style-type: none">●Functional Business Analyst x 2 (50%)●Functional Business Analyst x 1 (100%)	<ul style="list-style-type: none">●Change/Release Lead X 1 (5%)●Environment Mngr x 1 (5%)●Solution Designer x 3 (33%)●Solution Architect x 1 (20%)		<ul style="list-style-type: none">●Technical Lead x 2 (25%)●BA x 6 (33%)●Data Analyst x 3 (30%)●QA Lead x 3 (33%)●QA Analyst x 3 (33%)		<ul style="list-style-type: none">●PM x 1 (20%)●OCT Ops Lead x 1 (10%)●Enterprise Architect x 1 (10%)		<ul style="list-style-type: none">●Leadership x 2 (5%)●PM x 1 (75%)					
Initiative Timeline		2020				2021				2022			
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (30 weeks)													

EAM Stabilize and Adopt Waves

Initiative Description					Dependency on other Initiatives									
EAM Stabilize and Adopt waves will be required after the implementation of all EAM modules to ensure that the product is stable and working as intended. Any technical changes required to the product will be incorporated in this wave.					●ERP Selection ●ERP Data Clean-up ●ERP Solution Architecture ●ERP Wave 4.1 and 4.2 (EAM Rollout)									
Technology Implementation			Process Standardization		Costing Requirements									
●Stabilization and adoption of all EAM modules after implementation and go live			●NA		●External: \$400-480K for Wave 1; \$400-480K for Wave 2									
Resource Requirements														
Process Resources			Technology Resources			Program Resources								
Internal		External	Internal		External	Internal		External						
● NA		● NA	● NA		●Wave 1 - Tech Analyst x 2 (100%) ●Wave 2 - Tech Analyst x 3 (100%)	● NA		●Wave 1 - PM x 1 (10%) ●Wave 2 - PM x 1 (10%)						
Initiative Timeline			2021		2022			2023						
			Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (12 weeks each)			Wave 1 Wave 2											

SIL Wave 5 – ERP EAM Integrations


Initiative Description					Dependency on other Initiatives									
SIL Wave 5 – ERP EAM Integrations will be the fifth major wave required to integrate EAM modules rolled out in ERP Wave 4.1 and 4.2 to the Core ERP and other feeder applications at the City. Activities include: <ul style="list-style-type: none">Defining the scope of feeder applications for which integrations would be required to the ERP EAM modulesDesigning integration details such as (e.g. API architecture, detailed API design) to enable the integrations between systemsDevelopment, testing, and deployment of the integrations					<ul style="list-style-type: none">ERP SelectionERP Data Clean-upERP Solution ArchitectureSIL Evaluation and Procurement									
Technology Implementation			Process Standardization		Costing Requirements									
<ul style="list-style-type: none">ERP feeder systems and ERP EAM Wave 4.1 and 4.2 modules APIs architectureDetailed API design for data exchangeDevelopment, testing and deployment integrations to feeder applications using the SIL platform			•NA		<ul style="list-style-type: none">Internal: \$80-120KExternal: \$600-800K									
Resource Requirements														
Process Resources			Technology Resources			Program Resources								
Internal		External	Internal		External	Internal		External						
• NA		• NA	<ul style="list-style-type: none">Solution Designer x 1 (20%)Solution Architect x 1 (20%)Change/Release Lead x 1 (5%)Environment Mngr x 1 (5%)		<ul style="list-style-type: none">Technical Lead x 1 (20%)Tech Analyst x 1 (100%)QA Lead x 1 (33%)QA Analyst x 1 (33%)	<ul style="list-style-type: none">PM x (20%)OCT Ops Lead x 1 (10%)EA x 1 (10%)		• N/A						
Initiative Timeline			2020				2021				2022			
			Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (48 weeks)														

18.3 POSSE Modernization Initiatives

Permits & Licensing Evaluation														
Initiative Description						Dependency on other Initiatives								
<p>Permits & Licensing (P&L) Evaluation will be required to ascertain the best Permits & Licensing solution that fits into the City's architecture landscape. Activities include:</p> <ul style="list-style-type: none">•P&L requirements from core business units that manage those functions at the City•Requirements analysis and consolidation by the project resources•Architectural evaluation and cost evaluation of P&L (e.g. Accela, POSSE, Archetype) vendors and contracts•This initiative will be followed by P&L Tool Selection						<ul style="list-style-type: none">•None identified								
Technology Implementation			Process Standardization			Costing Requirements								
<ul style="list-style-type: none">•Not Applicable			<ul style="list-style-type: none">•Not Applicable			<ul style="list-style-type: none">•Internal: \$50-70K•External: \$450-650K								
Resource Requirements														
Process Resources			Technology Resources				Program Resources							
Internal		External	Internal		External		Internal		External					
<ul style="list-style-type: none">• Business Representative x 4 (25%)		<ul style="list-style-type: none">• NA	<ul style="list-style-type: none">• NA		<ul style="list-style-type: none">• NA		<ul style="list-style-type: none">• PM x 1 (20%)• Enterprise Architect x 1 (10%)• OCT Ops Lead x 1 (10%)• Security Lead x 1 (5%)• Security Analyst x 1 (5%)		<ul style="list-style-type: none">• Project Manager (PM) x 1 (100%)• Business Analyst (BA) x 2 (100%)					
Initiative Timeline			2019				2020				2021			
			Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (24 weeks)														

Permits & Licensing Tool Procurement/Selection														
Initiative Description						Dependency on other Initiatives								
<p>Permits & Licensing Tool Procurement/Selection will be required to select the vendor that will provide licensing for the P&L solution. Activities include:</p> <ul style="list-style-type: none">•A regular procurement process where an RFP is written to incorporate the business requirements, and inputs are consolidated from various representative on the procurement selection team•Evaluation criteria definition with inputs from the selection team and/or other standard criteria followed by the City for its procurement processes•Selection of the vendor based on the criteria outlined•Negotiation details related to pricing and finalizing the contract•Procurement of licenses post contract negotiations (if needed)						<ul style="list-style-type: none">•Permits & Licensing Evaluation Initiative								
Technology Implementation			Process Standardization			Costing Requirements								
<ul style="list-style-type: none">•Not Applicable			<ul style="list-style-type: none">•Not Applicable			<ul style="list-style-type: none">•Internal: \$150-200K								
Resource Requirements														
Process Resources			Technology Resources				Program Resources							
Internal		External	Internal		External		Internal		External					
<ul style="list-style-type: none">• Business Representative x 2 (25%)		<ul style="list-style-type: none">• NA	<ul style="list-style-type: none">• NA		<ul style="list-style-type: none">• NA		<ul style="list-style-type: none">• PM x 1 (20%)• BA x 1 (50%)• CPSS Staff x 1 (25%)• EA x 1 (10%)• OCT Ops Lead x 1 (10%)• Security Lead x 1 (5%)• Security Analyst x 1 (5%)		<ul style="list-style-type: none">• NA					
Initiative Timeline			2020				2021				2022			
			Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (36 weeks)														


Workflow Management System (WMS) Evaluation

Initiative Description				Dependency on other Initiatives					
WMS Evaluation will be required to ascertain the best WMS solution that fits into the City's architecture landscape. Activities include: <ul style="list-style-type: none">•WMS requirements from core business units that manage those functions at the City•Requirements analysis and consolidation by the project resources•Architectural evaluation and cost evaluation of P&L (e.g. ServiceNow, BMC Remedy, Salesforce) vendors and contracts•This initiative will be followed by WMS Tool Selection				•None identified					
Technology Implementation		Process Standardization		Costing Requirements					
•Not Applicable		•Not Applicable		•Internal: \$50-70K •External: \$400-600K					
Resource Requirements									
Process Resources		Technology Resources		Program Resources					
Internal	External	Internal	External	Internal	External				
• Business Representative x 4 (25%)	• NA	• NA	• NA	• PM x 1 (50%) • OCT Ops Lead x 1 (10%) • EA x 1 (10%) • Security Lead x 1 (5%) • Security Analyst x 1 (5%)	• Project Manager (PM) x 1 (100%) • Business Analyst (BA) x 2 (100%)				
Initiative Timeline		2019		2020		2021			
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (24 weeks)									


Workflow Management System (WMS) Procurement/Selection

Initiative Description					Dependency on other Initiatives								
<p>Workflow Management System (WMS) Selection will be required to select the vendor that will provide licensing for the WMS solution. Activities include:</p> <ul style="list-style-type: none">•A regular procurement process where an RFP is written to incorporate the business requirements, and inputs are consolidated from various representative on the procurement selection team•Evaluation criteria definition with inputs from the selection team and/or other standard criteria followed by the City for its procurement processes•Selection of the vendor based on the criteria outlined•Negotiation details related to pricing and finalizing the contract•Procurement of licenses post contract negotiations (if needed)					<ul style="list-style-type: none">•WMS Evaluation Initiative								
Technology Implementation		Process Standardization			Costing Requirements								
<ul style="list-style-type: none">•Not Applicable		<ul style="list-style-type: none">•Not Applicable			<ul style="list-style-type: none">•Internal: \$150-200K								
Resource Requirements													
Process Resources		Technology Resources			Program Resources								
Internal	External	Internal		External	Internal			External					
<ul style="list-style-type: none">• Business Representative x 2 (25%)	<ul style="list-style-type: none">• NA	<ul style="list-style-type: none">• NA		<ul style="list-style-type: none">• NA	<ul style="list-style-type: none">• PM x 1 (20%)• BA x 1 (50%)• CPSS Staff x 1 (25%)• EA x 1 (10%)• OCT Ops Lead x 1 (10%)• Security Lead x 1 (5%)• Security Analyst x 1 (5%)			<ul style="list-style-type: none">• NA					
Initiative Timeline		2020				2021		2022					
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (36 weeks)		<div></div>											


POSSE Modernization Wave 1 – Permits & Licensing

Initiative Description					Dependency on other Initiatives								
<p>POSSE Modernization Wave 1 – Permits & Licensing will be the first major wave required to implement the selected future state solution (e.g. POSSE, Accela, Archetype) and related process standardization for Permits & Licensing functions. Activities include:</p> <ul style="list-style-type: none">● Configuration, testing and deployment of technology solution for Permits & Licensing functions.● Point integrations, for an interim period, to SAP, PeopleSoft, Tririga, and ESRI, which can be later moved to the Systems Integration Layer as the other ERP implementation progress● Process standardization for Urban Form eServices business unit in parallel to the implementation, building on the presently ongoing Urban Form eServices process standardization initiative.● Future state operating model design, including for the governance model, to feed into the overall operating model for the branch(es) that manage Permits & Licensing					<ul style="list-style-type: none">● ERP Selection● ERP Solution Architecture● EIM Roadmap and Plan● Land / Building History Migration								
Technology Implementation		Process Standardization			Costing Requirements								
<ul style="list-style-type: none">● OOTB implementation of the Permits & Licensing solution● Related data conversion, cleanup and migration, and go live of the selection solution		<ul style="list-style-type: none">● Implement vendor provided standard processes for the Permits & Licensing functions (modules)Standardize processes till the L5 level● Future operating and governance model design			<ul style="list-style-type: none">● Internal: \$140-200K● External: \$1300-2000K								
Resource Requirements													
Process Resources		Technology Resources			Program Resources								
Internal <ul style="list-style-type: none">● Process Owner x 1 (20%)● Business Representative x 2 (50%) External <ul style="list-style-type: none">● Functional Business Analyst x 2 (100%)		Internal <ul style="list-style-type: none">● Solution Designer x 1 (20%)● Solution Architect x 1 (20%)● Change/Release Lead x 1 (5%)● Environment Mngr x 1 (5%) External <ul style="list-style-type: none">● Technical Lead x 1 (50%)● Tech Analyst x 5 (50%)● Data Analyst x 1 (100%)● QA Lead x 1 (10%)● QA Analyst x 1 (100%)			Internal <ul style="list-style-type: none">● Leadership – OCT and P&L x 5 (2%)● PM x 1 (20%)● OCT Ops Lead x 1 (10%)● EA x 1 (10%)● Security Lead x 1 (5%)● Security Analyst x 1 (5%) External <ul style="list-style-type: none">● Leadership x 2 (5%)● Project Manager x 1 (50%)								
Initiative Timeline		2020				2021				2022			
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (30 weeks)													


POSSE Modernization Wave 2 – Workflow & Service Management

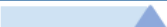
Initiative Description					Dependency on other Initiatives								
<p>POSSE Modernization Wave 2 – Workflow & Service Management will be required to implement the selected future state solution (e.g. ServiceNow, BMC Remedy, Salesforce) and related process standardization for Community Standards and Complaints, and Parks and Roads functions. Activities include:</p> <ul style="list-style-type: none">•Configuration, testing and deployment of technology solution.•Process standardization and workflows migration sprints will occur in parallel to the implementation for Community Standards and Complaints, and Parks and Roads functions.•Future state operating model design, including for the governance model, to feed into the overall operating model for the branch(es) that manage Community Standards and Complaints, and Parks and Roads workflows					<ul style="list-style-type: none">•ERP Selection•ERP Solution Architecture•EIM Roadmap and Plan								
Technology Implementation		Process Standardization			Costing Requirements								
<ul style="list-style-type: none">•OOTB implementation of the WMS solution•Related data conversion, cleanup and migration, and go live of the selection solution		<ul style="list-style-type: none">•Implement vendor provided standard processes for relevant workflow functions•Standardize processes till the L5 level•Future operating and governance model design			<ul style="list-style-type: none">•Internal: \$220-350K•External: \$2400-3600K								
Resource Requirements													
Process Resources		Technology Resources				Program Resources							
Internal <ul style="list-style-type: none">• Process Owner x 2 (20%)• Business Representative x 4 (25%) External <ul style="list-style-type: none">• Functional Business Analyst x 2 (100%)		Internal <ul style="list-style-type: none">• Solution Designer x 1 (40%)• Solution Architect x 1 (40%)• Change/Release Lead x 1 (100%)• Environment Mng'r x 1 (10%) External <ul style="list-style-type: none">• Technical Lead x 1 (50%)• Tech Analyst x 6 (50%)• Data Analyst x 1 (100%)• QA Lead x 1 (50%)• QA Analyst x 1 (100%)		Internal <ul style="list-style-type: none">• Leadership – OCT and P&L x 5 (2%)• PM x 1 (40%)• OCT Ops Lead x 1 (20%)• EA x 1 (20%)• Security Lead x 1 (5%)• Security Analyst x 1 (5%) External <ul style="list-style-type: none">• Leadership x 2 (10%)• Project Manager x 1 (100%)									
Initiative Timeline		2020				2021				2022			
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (30 weeks)													

POSSE Modernization Wave 3 – Workflow & Service Management


Initiative Description					Dependency on other Initiatives								
<p>POSSE Modernization Wave 3 – Workflow & Service Management will be required to implement the selected future state solution (e.g. ServiceNow, BMC Remedy, Salesforce) and related process standardization for Disputes, Exemptions and Claims functions. Activities include:</p> <ul style="list-style-type: none">•Configuration, testing and deployment of technology solution.•Process standardization and workflows migration sprints will occur in parallel to the implementation for Disputes, Exemptions and Claims functions.•Future state operating model design, including for the governance model, to feed into the overall operating model for the branch(es) that manage Disputes, Exemptions and Claims workflows					<ul style="list-style-type: none">•ERP Selection•ERP Solution Architecture•EIM Roadmap and Plan								
Technology Implementation		Process Standardization			Costing Requirements								
<ul style="list-style-type: none">•OOTB implementation of the WMS solution•Related data conversion, cleanup and migration, and go live of the selection solution		<ul style="list-style-type: none">•Implement vendor provided standard processes for the Disputes, Exemptions & Claims functionsStandardize processes till the L5 level•Future operating and governance model design			<ul style="list-style-type: none">•Internal: \$110-170K•External: \$1200-1800K								
Resource Requirements													
Process Resources		Technology Resources			Program Resources								
Internal <ul style="list-style-type: none">• Process Owner x 1 (20%)• Business Representative x 2 (25%)		External <ul style="list-style-type: none">• Functional Business Analyst x 2 (50%)		Internal <ul style="list-style-type: none">• Solution Designer x 1 (120%)• Solution Architect x 1 (20%)• Change/Release Lead x 1 (5%)• Environment Mngr x 1 (5%)	External <ul style="list-style-type: none">• Technical Lead x 1 (50%)• Tech Analyst x3 (50%)• Data Analyst x1 (50%)• QA Lead x 1 (33%)• QA Analyst x 1 (66%)	Internal <ul style="list-style-type: none">• Leadership – OCT and P&L x 5 (2%)• PM x 1 (20%)• OCT Ops Lead x 1 (10%)• EA x 1 (10%)• Security Lead x1 (5%)• Security Analyst x1 (5%)				External <ul style="list-style-type: none">• Leadership x 2 (5%)• Project Manager x 1 (50%)			
Initiative Timeline		2020				2021				2022			
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (30 weeks)													


SIL Wave 4a – Permits & Licensing Integrations

Initiative Description					Dependency on other Initiatives									
<p>SIL Wave 4a – Permits & Licensing Integrations will be required to integrate newly implemented Permits & Licensing system with the new ERP and other applications such as GIS. Activities include:</p> <ul style="list-style-type: none">●Defining the scope integrations required between Permits & Licensing system with the new ERP and other applications●Designing integration details such as (e.g. API architecture, detailed API design) to enable the integrations between systems●Development, testing, and deployment of the integrations					<ul style="list-style-type: none">●ERP Selection●ERP Data Clean-up●ERP Solution Architecture●SIL Evaluation and Procurement●POSSE Modernization Wave 1 – Permits & Licensing									
Technology Implementation		Process Standardization			Costing Requirements									
<ul style="list-style-type: none">●Permits & Licensing system, new ERP and other applications APIs architecture●Detailed API design for data exchange●Development, testing and deployment integrations to feeder applications using the SIL platform		<ul style="list-style-type: none">●NA			<ul style="list-style-type: none">●Internal: \$55-80K●External: \$320-480K									
Resource Requirements														
Process Resources		Technology Resources				Program Resources								
<div>● NA</div> <div>Internal</div>		<div>● NA</div> <div>External</div>		<div>● Solution Designer x 1 (20%)</div> <div>● Solution Architect x 1 (20%)</div> <div>● Change/Release Lead x 1 (5%)</div> <div>● Environment Mngr x 1 (5%)</div> <div>Internal</div>		<div>● Technical Lead x 1 (20%)</div> <div>● Tech Analyst x 2 (50%)</div> <div>● QA Lead x 1 (33%)</div> <div>● QA Analyst x 1 (33%)</div> <div>External</div>		<div>● PM x 1 (20%)</div> <div>● OCT Ops Lead x 1 (10%)</div> <div>● EA x 1 (10%)</div> <div>● Security Lead x 1 (5%)</div> <div>● Security Analyst x 1 (5%)</div> <div>Internal</div>				<div>● Leadership x 2 (5%)</div> <div>● Project Manager x 1 (20%)</div> <div>External</div>		
Initiative Timeline		2020				2021				2022				
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
Proposed Duration (24 weeks)														

SIL Wave 4b – WMS Integrations														
Initiative Description						Dependency on other Initiatives								
<p>SIL Wave 4b – WMS Integrations will be required to integrate integrating newly implemented Workflow and Service Management system with the new ERP and other applications such as GIS. Activities include:</p> <ul style="list-style-type: none">Defining the scope integrations required between Workflow and Service Management Tool with the new ERP and other applicationsDesigning integration details such as (e.g. API architecture, detailed API design) to enable the integrations between systemsDevelopment, testing, and deployment of the integrations						<ul style="list-style-type: none">ERP SelectionERP Data Clean-upERP Solution ArchitectureSIL Evaluation and ProcurementPOSSE Modernization Wave 2 – Workflow & Service ManagementPOSSE Modernization Wave 3 – Workflow & Service Management								
Technology Implementation			Process Standardization			Costing Requirements								
<ul style="list-style-type: none">Workflow and Service Management system, new ERP and other applications APIs architectureDetailed API design for data exchangeDevelopment, testing and deployment integrations to feeder applications using the SIL platform			<ul style="list-style-type: none">NA			<ul style="list-style-type: none">Internal: \$55-80KExternal: \$320-480K								
Resource Requirements														
Process Resources			Technology Resources				Program Resources							
Internal		External	Internal		External		Internal			External				
<ul style="list-style-type: none">NA		<ul style="list-style-type: none">NA	<ul style="list-style-type: none">Solution Designer x 1 (20%)Solution Architect x 1 (20%)Change/Release Lead x 1 (5%)Environment Mngr x 1 (5%)		<ul style="list-style-type: none">Technical Lead x 1 (20%)Tech Analyst x 2 (50%)QA Lead x 1 (33%)QA Analyst x 1 (33%)		<ul style="list-style-type: none">PM x 1 (20%)OCT Ops Lead x 1 (10%)EA x 1 (10%)Security Lead x 1 (5%)Security Analyst x 1 (5%)			<ul style="list-style-type: none">Leadership x 2 (5%)Project Manager x 1 (20%)				
Initiative Timeline			2020				2021				2022			
			Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (24 weeks)														

18.4 Organizational Change Management Initiatives

Organizational Change Management - Preparation															
Initiative Description							Dependency on other Initiatives								
The Organizational Change Management Preparation phase will form the change management team with external and internal City of Edmonton resources. The preparation phase will include: <ul style="list-style-type: none">•Performing current state and cultural assessments•Developing a stakeholder engagement and overall communications plan•Creating an organizational change readiness strategy•Engaging and building readiness within the City of Edmonton•Developing a People Risk Register to identify any people related issues							•ERP Evaluation								
Technology Implementation				Process Standardization			Costing Requirements								
• N/A				• N/A			Internal: \$40-60K External: \$400-500K								
Resource Requirements															
Process Resources				Technology Resources				Program Resources							
Internal		External		Internal		External		Internal			External				
• Finance x 1 (5%) • HR x 1 (5%) • EAM x 1 (5%) • SCM x 1 (5%)		• N/A		• N/A		• N/A		• City Leadership x 1 (5%) • OCT Ops Lead x 1 (5%) • Change Management PM x 1 (20%) • Change Management Analyst x 2 (50%)			• OCM Director x 1 (50%) • OCM Manager x 1 (50%) • OCM Senior Analyst x 2 (100%)				
Initiative Timeline				2020				2021				2022			
				Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (12 weeks)															

Organizational Change Management - Rollout														
Initiative Description							Dependency on other Initiatives							
<p>The Organizational Change Management Rollout phase will engage stakeholders from across the organization to identify factors needed in order to implement change management, communications and training. This will be done through four main activities:</p> <ul style="list-style-type: none">●Assess training needs●Current Competency Assessment●Identification of competencies/ capabilities required●Capabilities Gap Analysis							<ul style="list-style-type: none">●Change Management Preparation●ERP Evaluation							
Technology Implementation			Process Standardization				Costing Requirements							
• N/A			• N/A				Internal: \$60-70K External: \$660-780K							
Resource Requirements														
Process Resources			Technology Resources				Program Resources							
Internal		External	Internal		External		Internal		External					
●Finance x 1 (5%) ●HR x 1 (5%) ●EAM x 1 (5%) ●SCM x 1 (5%)		• N/A	• N/A		• N/A		●City Leadership x 1 (5%) ●OCT Ops Lead x 1 (5%) ●Change Management PM x 1 (20%) ●Change Management Analyst x 2 (50%)		●OCM Director x 1 (50%) ●OCM Manager x 1 (50%) ●OCM Senior Analyst x 2 (100%)					
Initiative Timeline			2020				2021				2022			
			Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (24 weeks)														

Organizational Change Management - Strategy Implementation

Initiative Description					Dependency on other Initiatives												
<p>The Organizational Change Management Rollout will take a “people centric” approach to change management this will include three main phases:</p> <ul style="list-style-type: none">●Creating a tailored communications strategy for all ERP Initiatives including development of key messages●Managing change management activities and creating engagement opportunities●Governance of change management initiatives through monitoring communications and stakeholder engagement metrics					<ul style="list-style-type: none">●Change Management Preparation●Change Management Rollout●ERP Selection												
Technology Implementation		Process Standardization			Costing Requirements												
• N/A		• N/A			Internal: \$60-70K External: \$800-950K												
Resource Requirements																	
Process Resources		Technology Resources			Program Resources												
Internal <ul style="list-style-type: none">●Finance x1 (5%)●HR x1 (5%)●EAM x1 (5%)●SCM x1 (5%)		External <ul style="list-style-type: none">• N/A			Internal <ul style="list-style-type: none">•N/A		External <ul style="list-style-type: none">• N/A			Internal <ul style="list-style-type: none">●City Leadership x1 (5%)●OCT Ops Lead x1 (5%)●Change Management PM x1 (25%)●Change Management Analyst x2 (50%)				External <ul style="list-style-type: none">●OCM Director x1 (25%)●OCM Manager x1 (25%)●OCM Senior Analyst x2 (50%)			
Initiative Timeline					2020				2021				2022				
					Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
Proposed Duration (96 weeks)																	

Organizational Change Management - Creation and Administration of Training

Initiative Description					Dependency on other Initiatives											
Training will be a key component of a successful ERP Implementation. A training plan will be developed through the information gathered from the training needs and competency assessments. Throughout this phase training modules will be developed for each phase of the ERP implementation. Training will be designed based on stakeholder needs and will incorporate several different training methods.					<ul style="list-style-type: none">•Change Management Preparation•Change Management Rollout•ERP Selection											
Technology Implementation		Process Standardization			Costing Requirements											
• N/A		• N/A			Internal: \$180-230K External: \$2700-3200K											
Resource Requirements																
Process Resources		Technology Resources			Program Resources											
Internal		Internal			External											
• N/A		• N/A			<ul style="list-style-type: none">•Learning and Development Lead x 1 (25%)•Learning Analyst x 1 (25%)•Graphic Designer x 1 (25%)											
					<ul style="list-style-type: none">•OCM Director x 1 (25%)•OCM Manager x1 (50%)•Instructional Designer x 4 (50%)•Learning Analyst x 2 (25%)											
Initiative Timeline					2020				2021				2022			
					Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (96 weeks)																

Stakeholder Engagement: POSSE Modernization															
Initiative Description								Dependency on other Initiatives							
POSSE impacts both internal and external stakeholders therefore it is crucial to develop a strategy to address the citizens of Edmonton. This will include four main phases as outlined on the initiatives roadmap: <ul style="list-style-type: none">•Identify external stakeholders•Assess communications and change management needs•Develop External Stakeholder Engagement Plan•Implement and deliver external stakeholder strategy•Evaluate and report back on stakeholder engagement								<ul style="list-style-type: none">•ERP Selection•Implementation of Organizational Change Management Strategy							
Technology Implementation				Process Standardization				Costing Requirements							
N/A				N/A				Internal: \$35-50K External: \$370-470K							
Resource Requirements															
Process Resources				Technology Resources				Program Resources							
Internal		External		Internal		External		Internal			External				
• N/A		• N/A		• N/A		• N/A		• City Leadership x 1 (10%) • Change Management PM x 1 (25%) • Change Management Analyst x 1 (25%)			• OCM Dir. x 1 (25%) • OCM Mgr x 1 (50%) • OCM Sr. Associate x 2 (50%)				
Initiative Timeline				2020				2021				2022			
				Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Proposed Duration (72 weeks)															

19 Appendix F – Risks and Mitigation Plans

The following table details the identified risks related to the ESTP program, their classification by category and risk severity levels, along with the mitigation strategies for each risk.

#	Risk	Category	Level	Mitigation Strategy
1	Inability to make critical decisions and provide approval from the City Leadership.	Governance	Impact: <i>Severe</i> Likelihood: <i>Unlikely</i> Severity: <i>Medium</i>	<ul style="list-style-type: none"> Establish robust governance structure as part of ESTP preparation phase
2	Insufficient leadership support for the solution, policies and processes after implementation.	Governance	Impact: <i>Severe</i> Likelihood: <i>Unlikely</i> Severity: <i>Medium</i>	<ul style="list-style-type: none"> Develop clear communications strategy to allow for top-down support to encourage policy compliance through education and resource support
3	Low alignment with the other transformation initiatives with overlapping scope to the ESTP initiatives.	Governance	Impact: <i>Severe</i> Likelihood: <i>Moderately Likely</i> Severity: <i>High</i>	<ul style="list-style-type: none"> Develop stakeholder engagement strategy to ensure alignment across the organization Develop key messages to support scope of ESTP initiatives
4	Unique departmental processes not being standardized due to legal regulations or legislation requirements (e.g., collective bargaining agreement processes).	Standardization	Impact: <i>Moderate</i> Likelihood: <i>Likely</i> Severity: <i>High</i>	<ul style="list-style-type: none"> Develop and implement leadership vision and direction for this standardization
5	Slow adoption or rejection of new solution and processes related to the ESTP.	Change Adoption	Impact: <i>Severe</i> Likelihood: <i>Likely</i> Severity: <i>Very High</i>	<ul style="list-style-type: none"> Clearly define key performance indicators to measure the rate of adoption Develop comprehensive change management plan, including key messages and training to ensure organizational buy-in for ESTP
6	Non-implementation of integrated change management strategy to guide business readiness.	Change Adoption	Impact: <i>Severe</i> Likelihood: <i>Unlikely</i> Severity: <i>Medium</i>	<ul style="list-style-type: none"> Develop clearly defined change management and stakeholder engagement strategy
7	Inadequate communication and engagement with key stakeholders and employees impacted by change.	Change Adoption	Impact: <i>Severe</i> Likelihood: <i>Unlikely</i> Severity: <i>Medium</i>	<ul style="list-style-type: none"> Develop communications strategy and progress reporting Early engagement of key stakeholders
8	Inadequate team resourcing for preparation, implementation and sustainment of the Program - PMO, Core Team and SMEs.	Resourcing	Impact: <i>Severe</i> Likelihood: <i>Moderately Likely</i> Severity: <i>High</i>	<ul style="list-style-type: none"> Identify key resources as prior to the ESTP start Work closely with the HR team to ensure appropriate resources are available

#	Risk	Category	Level	Mitigation Strategy
9	Leadership changes resulting in decreased support for the ESTP Transformation.	Resourcing	Impact: <i>Severe</i> Likelihood: <i>Moderately Likely</i> Severity: <i>High</i>	<ul style="list-style-type: none"> Identify alternative executive program sponsor / champion before the leadership changes
10	Cloud-based ERP not adequately meeting all functional needs at the City, including Benefits and Pensions administration.	Technology	Impact: <i>Moderate</i> Likelihood: <i>Moderately Likely</i> Severity: <i>Medium</i>	<ul style="list-style-type: none"> Explore possibilities of integrating either best-of-breed systems or existing systems that meet the functional needs to the ERP solution through a systems integration layer
11	Cloud integration challenges with other systems.	Technology	Impact: <i>Severe</i> Likelihood: <i>Moderately Likely</i> Severity: <i>High</i>	<ul style="list-style-type: none"> Gather integration requirements ahead of procurement for the system and understand technical capabilities of selected tool Build in required stage gating into the procurement process for piloting and testing of integration
12	A risk related to data security, data retention, residency and recovery due to the implementation of a Cloud ERP.	Technology	Impact: <i>Severe</i> Likelihood: <i>Unlikely</i> Severity: <i>Medium</i>	<ul style="list-style-type: none"> Ensure compliance with legislative and other legal requirements related to moving ERP to cloud
13	Inconsistent data quality between in-scope systems could impact functionality.	Data	Impact: <i>Severe</i> Likelihood: <i>Moderately Likely</i> Severity: <i>High</i>	<ul style="list-style-type: none"> Prepare, cleanup and align master data before implementation
14	Extraction and consolidation of data from Cloud ERP to provide complete business analytics may be incomplete.	Data	Impact: <i>Moderate</i> Likelihood: <i>Moderately Likely</i> Severity: <i>Medium</i>	<ul style="list-style-type: none"> Finalize/leverage Enterprise Analytics strategy and form a business analytics action plan prior to implementation Establish agreement with the ERP solution provider on data ownership and usage needs. Implement the business analytics action plan along with the ERP implementation
15	Lack of ability to execute procurement program in the expected timeline.	Procurement	Impact: <i>Severe</i> Likelihood: <i>Unlikely</i> Severity: <i>Medium</i>	<ul style="list-style-type: none"> Explore leveraging the City's existing contracts to save time for procurement of the solution
16	A risk of scope creep could increase costs and cause delays in implementation timeline.	Delivery	Impact: <i>Moderate</i> Likelihood: <i>Moderately Likely</i> Severity: <i>Medium</i>	<ul style="list-style-type: none"> Perform due diligence in requirements gathering and preparation phases Properly assess the need for more additional features than required and limit approval to only critical additions Limit the number of customizations and align processes to the technology solution

20 Appendix G – Financial Analysis Assumptions

S No	Category	Sub-Category	Assumptions
1	Time Period	General Assumptions	The study period for each of the options has been harmonized to ten years from the start of implementation; for SAP Cloud First option this period is from 2019 - 2028 and for Core Homogeneous and Best of Breed options it is 2019 - 2029 due to longer procurement.
2	Cost Estimation	General Assumptions	Cost estimates are provided based on the scope of work but do not constitute a guarantee, and costs may change based on the implementation timeline selected by the City.
3	Cost Estimation	General Assumptions	Rates used for external support are based on competitive Edmonton and Calgary market rates for consulting services.
4	Cost Estimation	General Assumptions	Rates used for internal resources are based on the following - Internal Branch resource rate tables (OCT), Collective Bargaining Agreement (CSU 52) 2018 resource rates (with addition of benefits), 2019-22 proposed City operating budget (blended branch rates), and blended resource rates provided by the City (CPSS).
5	Cost Estimation	General Assumptions	Yearly factors are used to account for average year-over-year cost increase. Two such factors are based on the Municipal Price Index (MPI) of the City of Edmonton - Wages (Internal and External) increase factor is 1.0288 (2.88 percent), and Other Costs (such as travel, training, membership dues, etc.) increase factor is 1.0208 (2.08 percent). (Source: City of Edmonton MPI)
6	Cost Estimation	General Assumptions	Projects costs increase factor is dependent on Wages increase and therefore assumed to be 1.0288 (or 2.88 percent yearly increase).
7	Cost Estimation	General Assumptions	A cost-increase factor of 2.5 percent per year is used to account for year-over-year cost increases changes in software costs (licensing and maintenance) based on the Commercial Software Price Index (CSPI) published by Statistics Canada. (Source: Statistics Canada CSPI).
8	Cost Estimation	General Assumptions	Infrastructure costs are assumed to increase by the same factor as the Software cost increase factor, i.e., 1.025 (or 2.5 percent yearly increase).
9	Cost Estimation	General Assumptions	Internal FTE support numbers are assumed to increase by 2percent year-over-year for SAP, PeopleSoft and External IT Groups to account for increase in internal support needed for the on premise systems in the future.
10	Cost Estimation	General Assumptions	Personnel costs increase factor is defined as the multiplication of Wages increase factor and FTE increase factor, and equals approximately 1.0494 (or 4.94 percent yearly increase).
11	Cost Estimation	General Assumptions	For internal resources, 48 working weeks are assumed in a year, and 35 average working hours in a week. As a result, 1680 average working hours are assumed in a year.
12	Cost Estimation	General Assumptions	For external resources, 48 working weeks are assumed in a year, and 40 average working hours in a week. As a result, 1920 average working hours are assumed in a year.
13	Cost Estimation	General Assumptions	A discount rate of 3 percent percent is used for Net Present Value (NPV) calculations. The City's 10-year debt financing rate is between 2 to 2.67 percent (Source: City of Edmonton 2017 Annual Report)

14	Cost Estimation	General Assumptions	Sensitivity analysis is performed using a benefit and cost variability of +-20 percent than the expected value.
S No	Category	Sub-Category	Assumptions
15	Cost Estimation	General Assumptions	In the worst case sensitivity scenario, it is assumed that the future state costs for SAP on premise, PeopleSoft and POSSE would stay at 100 percent of predicted Status Quo costs.
16	Cost Estimation	General Assumptions	All benefits related to cost reductions in capital projects, software licensing, software maintenance, infrastructure, and other costs (such as travel, training, membership dues, etc.) are categorized as harvestable benefits.
17	Cost Estimation	General Assumptions	All benefits related to reduction in personnel costs and increase in process efficiencies are categorized as non-harvestable benefits.
18	Cost Estimation	Status Quo - POSSE	The past POSSE CapEx costs provided by the City are explained with a reasonable degree of confidence using a 5-year moving average prediction model. Hence this model is used to predict the future CapEx costs from 2019 to 2029. This CapEx cost model should be validated after the completion of POSSE Deep Dive initiative planned by the City.
19	Cost Estimation	Status Quo - POSSE	The future state POSSE CapEx Costs show a large ramp up and a slight ramp down effect (e.g. CapEx costs go up for the years 2020 to 2024 and go down for 2025 and 2026) due to nature of capital investment in POSSE projects where the investment go up for 5 years and then go down for 1-2 following years. This trend is also observed in past POSSE capital investments at the City investments.
20	Cost Estimation	Status Quo - POSSE	City's past POSSE OpEx costs did not show any consistent trend with a reasonable degree of confidence. Hence, these OpEx costs for the year 2018 are predicted by using the average operating costs of the previous six years (2012-2017) for which the data collected by the City by using a consistent method. This OpEx cost model should be validated after the completion of POSSE Deep Dive initiative planned by the City.
21	Cost Estimation	Status Quo - POSSE	The POSSE OpEx costs for the years 2019-2023 are predicted using the costs of 2018 and a yearly cost increase of 5 percent to take into account the complexity associated with POSSE as compared to other systems. Further, to incorporate the increase in complexity for POSSE in the future, the costs factor is increased to 7 percent from 2024 to 2026 and to 9 percent for 2027 and 2029. This OpEx cost model should be validated after the completion of POSSE Deep Dive initiative planned by the City.
22	Cost Estimation	Status Quo - SAP	All CapEx and OpEx costs for the year 2018 are linearly extrapolated for the entire year using the costs provided for 8 months.
23	Cost Estimation	Status Quo - SAP	The CapEx and OpEx costs for the year 2019 are predicted by using the average costs of the previous four years (2015-2018) and yearly cost-factors already defined (e.g. Capital Projects yearly cost increase - 2.88percent, Personnel yearly cost increase - 4.94 percent, Software and Infrastructure yearly cost increase - 2.5 percent , and so on)
24	Cost Estimation	Status Quo - SAP	To account for the need for future upgrades for SAP on premise systems, for the years 2024 to 2028, a \$2 million cost per year is added to SAP Status Quo CapEx costs.
25	Cost Estimation	Status Quo - ARIBA	The CapEx and OpEx costs provided in the SAP Ariba Business Case are incorporated into the predictions for SAP Status Quo Costs in addition to the costs mentioned above by adding those costs to the existing costs.
26	Cost Estimation	Status Quo - PeopleSoft	The CapEx and OpEx cost for the year 2018 are linearly extrapolated for the entire year using the costs provided for 8 months.

S No	Category	Sub-Category	Assumptions
27	Cost Estimation	Status Quo - PeopleSoft	The CapEx and OpEx costs for the year 2019 are predicted by using the average costs of the previous four years (2015-2018) and yearly cost-factors already defined (e.g. Capital Projects yearly cost increase - 2.88 percent, Personnel yearly cost increase - 4.94 percent, Infrastructure yearly cost increase - 2.5 percent, and so on). An exception is the Software Support Costs for 2019 and 2020 where actual contract values are used.
28	Cost Estimation	Status Quo - PeopleSoft	An additional cost of \$147,500 is added to PeopleSoft licensing costs for 2019 based on additional user count projections provided by the City.
29	Cost Estimation	Status Quo - PeopleSoft	For Status Quo, it is assumed that the City will upgrade the PeopleSoft system by renewing the contract with Oracle starting 2022.
30	Cost Estimation	Status Quo - PeopleSoft	To account for the need for future upgrades for on premise PeopleSoft system, for the years 2022 to 2026, a \$1.5 million cost per year is added to PeopleSoft Status Quo CapEx costs.
31	Cost Estimation	Status Quo - PeopleSoft	The City will be out-of-support for the years 2018 to 2021, for which the City will have to compensate Oracle. Therefore, an additional cost for \$680,000 (plus the annual software cost increase factor) is added to PeopleSoft licensing and maintenance costs for the years 2022 to 2025 as compensation to Oracle for the out-of-support period.
32	Cost Estimation	Status Quo - External IT Support Groups	For 2018, it is assumed that there are 1.3 technical external IT support resources in Human Resources branch (actual number provided by the City) and 2 external IT support resources in Finance branch at the City for the year 2018.
33	Cost Estimation	Status Quo - External IT Support Groups	The External IT Support Group costs for the year 2019 to 2029 are predicted using the 2018 FTE numbers, working hours by branch, blended hourly rates by branch, yearly FTE increase factor (2 percent), and yearly wages increase (2.88 percent) factor.
34	Cost Estimation	Status Quo - Other HR and EH&S Apps	The cost for the following HR and EH&S applications were included in the Status Quo costs with a yearly increase factor of 1.025 (2.5 percent) - Oracle Taleo, Visier, OpenText LearnFlex, Saba Human Concepts (Org Charts), PhenomPeople, Intelex and Cority.
35	Cost Estimation	Future State Option - SAP Cloud First	Cost estimates for SAP Cloud First Option are based on a best estimate of the supply market and must be validated through the City's procurement process during the process of business case approval.
36	Cost Estimation	Future State Option - SAP Cloud First	Costs for external resources are assumed wherever external specialist skills will be required during various program phases.
37	Cost Estimation	Future State Option - SAP Cloud First	Program costs are calculated as a summation of costs of initiatives (including process standardization, technology implementation, and change management) on the implementation roadmap and takes business and technical resourcing requirements into consideration.
38	Cost Estimation	Future State Option - SAP Cloud First	Integration platform and the associated costs are assumed to be for an Industry leading product.
39	Cost Estimation	Future State Option - SAP Cloud First	To provision for major future system upgrades, \$3 Million per year have been budgeted from 2024 to 2028.

S No	Category	Sub-Category	Assumptions
40	Cost Estimation	Future State Option - SAP Cloud First	Contingency costs were assumed to be \$0.5 Million per year from 2022 to 2028. Contingencies may be needed in any component of future state capital and operating costs.
41	Cost Estimation	Future State Option - Core Homogenous ERP	The cost estimation for the Core Homogenous ERP option is derived from the SAP Cloud First option with an additional procurement window of one year.
42	Cost Estimation	Future State Option - Core Homogenous ERP	The 2019 costs for the Core Homogenous option are mainly preparation and procurement costs, and others costs start from the year 2020.
43	Cost Estimation	Future State Option - Core Homogenous ERP	To provision for major future system upgrades, \$3 Million per year have been budgeted from 2025 to 2029.
44	Cost Estimation	Future State Option - Core Homogenous ERP	Contingency costs were assumed to be \$0.5 Million per year from 2023 to 2029. Contingencies may be needed in any component of future state capital and operating costs.
45	Cost Estimation	Future State Option - Best of Breed	The best-of-breed ERP options were assumed to be Workday for HR, SAP for Supply Chain and Procurement, Oracle for Finance, and IBM Maximo for EAM based SME inputs and market research.
46	Cost Estimation	Future State Option - Best of Breed	Cost estimates for Best of Breed Option are based on a best estimate of the supply market and must be validated through the City's procurement process during the process of business case approval.
47	Cost Estimation	Future State Option - Best of Breed	An additional procurement window of one year was assumed for the Best-of-Breed Option versus the SAP Cloud First Option due to additional time needed to procure different solutions from different vendors.
48	Cost Estimation	Future State Option - Best of Breed	The 2019 costs for the Best-of-Breed option are mainly preparation and procurement costs, and others costs start from the year 2020.
49	Cost Estimation	Future State Option - Best of Breed	10 percent additional integration costs were assumed for this option than the SAP Cloud First option because of the higher number of integrations required among four different ERPs systems and other feeder applications.
50	Cost Estimation	Future State Option - Best of Breed	To provision for major future system upgrades, \$3 Million per year have been budgeted from 2025 to 2029.
51	Cost Estimation	Future State Option - Best of Breed	Contingency costs were assumed to be \$0.5 Million per year from 2023 to 2029. Contingencies may be needed in any component of future state capital and operating costs.

S No	Category	Sub-Category	Assumptions
52	Benefits Realization	Future State - POSSE	Cost ramp down factors are used to calculate Future State POSSE costs. These ramp down factors are assumed as a percentage of Status Quo Costs. The difference between the Status Quo costs and Future State costs is calculated as the benefit value. The benefit realization from POSSE should be validated after the completion of POSSE Deep Dive initiative planned by the City.
53	Benefits Realization	Future State - POSSE	Future State POSSE CapEx costs for the years 2019 to 2023 are assumed to be 100 percent, 90 percent, 80 percent, 80 percent, and 70 percent of Status Quo POSSE CapEx Costs for the same years, and stable 70 percent from 2024 to 2029.
54	Benefits Realization	Future State - POSSE	Future State POSSE OpEx costs for the years 2019 to 2023 are assumed to be 100 percent, 100 percent, 80 percent, 80 percent, and 80 percent of the Status Quo POSSE OpEx Costs for the same years, and stable at 80 percent from 2024 to 2029.
55	Benefits Realization	Future State - POSSE	The POSSE costs ramp down gradually by 20-30 percent from 2020 to 2023 because of benefits accrual from application rationalization and process standardization, and from using Out-of-the-box technology with minimal customizations.
56	Benefits Realization	Future State - POSSE	The CapEx benefit realization for POSSE is earlier than OpEx benefit realization as the City can put a moratorium on CapEx projects/costs more easily than OpEx costs.
57	Benefits Realization	Future State - POSSE	The remaining portion of the POSSE costs (70-80 percent) that continue into the Future State are assumed to be invested in upgrade projects and operations of new (or existing) Permits and Licensing and Workflow Management Systems after POSSE rationalization initiatives are complete.
58	Benefits Realization	Future State - POSSE	The benefits for Best-of-Breed and Core Homogenous ERP options are realized one year later than the SAP Cloud First Option due to additional time needed to procure different solutions from different vendors.
59	Benefits Realization	Future State - SAP	Cost ramp down factors are used to calculate Future State SAP On-Premise (plus Ariba Cloud) costs. These ramp down factors are assumed as a percentage of Status Quo Costs. The difference between the Status Quo costs and Future State costs is calculated as the benefit value.
60	Benefits Realization	Future State - SAP	Future State SAP CapEx costs for the years 2019 to 2023 are assumed to be 100 percent, 90 percent, 70 percent, 30 percent and 10 percent of the Status Quo SAP CapEx Costs for the same years, and stable at 10 percent from 2024 to 2029. A small decrease happens in 2019 and 2020, costs ramp down to 70 percent in 2021 when portions of the new system would go live, and to 30 percent in 2022 after the implementation of new SAP Cloud ERP is complete. All of existing CapEx costs related SAP On-Premise systems (except SAP Ariba Capital costs of around 10 percent of total) are assumed to be eliminated in 2023, one year after implementation. This sequence of ramp down percentages is based on the implementation roadmap of Future State SAP Cloud implementation.
61	Benefits Realization	Future State - SAP	For the years 2019 to 2023, Future State SAP Personnel and Services Costs (within OpEx) are assumed to be 100 percent, 100 percent, 100 percent, 70 percent, and 30 percent of the Status Quo equivalents costs for the same years, and stable at 0 percent from 2024 to 2028/2029. No cost ramp down is assumed from 2019 to 2021 as the existing systems would still need the personnel support. Costs ramp down to 70 percent in 2022 and 30 percent in 2023 after the implementation of the new SAP Cloud ERP is complete in 2021. All these costs are available for elimination or reallocation from the year 2024. Internal support for the future state ERP cloud system (and SAP Ariba) can be provided through the new Internal Services Support Centre.

S No	Category	Sub-Category	Assumptions
62	Benefits Realization	Future State - SAP	For the years 2019 to 2023, SAP on premise (plus SAP Ariba) licensing, maintenance and vendor support costs are assumed to be 100 percent, 100 percent, 100 percent, 50 percent of the Status Quo costs for the same years, and stable at 25 percent from 2024 to 2029. No decrease happens from 2019 to 2021 because the old system would still be running before the new implementation is complete. These costs decrease to 50 percent in 2022 after the implementation of new SAP Cloud ERP is complete. All licensing, maintenance and support costs related to the current SAP system (except the SAP Ariba costs of ~25 percent of total) are assumed to be eliminated from 2023.
63	Benefits Realization	Future State - SAP	A conservative assumption is made where the infrastructure costs attributed to SAP on premise system are not ramped down at all (or kept at 100 percent of Status Quo Costs). This is because infrastructure costs are difficult to ramp down as the corporate applications share common infrastructure with numerous other applications.
64	Benefits Realization	Future State - SAP	Other costs include training, travel for training/conferences, recognition, membership & professional dues. These are expected to continue into the future state and hence not ramped down at all.
65	Benefits Realization	Future State - SAP	The CapEx benefit realization for SAP is earlier than OpEx benefit realization as the City can put a moratorium on CapEx projects/costs more easily than OpEx costs.
66	Benefits Realization	Future State - SAP	SAP OpEx cost are assumed to stay at 30 percent from 2023 to 2029 to account for the SAP Ariba operational costs.
67	Benefits Realization	Future State - SAP	The benefits for Best-of-Breed and Core Homogenous ERP options are realized one year later than the SAP Cloud First Option due to additional time needed to procure different solutions from different vendors.
68	Benefits Realization	Future State - PeopleSoft	Cost ramp down factors are used to calculate Future PeopleSoft costs. These ramp down factors are assumed as a percentage of Status Quo Costs. The difference between the Status Quo costs and Future State costs is calculated as the benefit value.
69	Benefits Realization	Future State - PeopleSoft	Future State PeopleSoft CapEx costs for the years 2019 to 2023 are assumed to be 100 percent, 90 percent, 70 percent, 30 percent and 0 percent of the Status Quo PeopleSoft CapEx costs for the same years, and stable at 0 percent from 2024 to 2029. A small costs decrease happens in 2019 and 2020 as the implementation of the new system would have only started in those years and the existing system would still have to be maintained. Costs ramp down to 70 percent in 2021 when portions of the new system would go live, and to 30 percent in 2022 after the implementation is complete in December 2021. All existing CapEx costs related PeopleSoft system can be eliminated in 2023. This sequence of ramp down percentages is based on the implementation roadmap of Future State SAP Cloud implementation that will replace PeopleSoft.
70	Benefits Realization	Future State - PeopleSoft	For the years 2019 to 2023, PeopleSoft Personnel and Services Costs (within OpEx) are assumed to be 100 percent, 100 percent, 100 percent, 70 percent, and 30 percent of the Status Quo equivalents costs for the same years, and stable at 0 percent from 2024 to 2028/2029. No cost decreases are assumed from 2019 to 2021 because the existing systems would still need the personnel and services support. Costs slowly ramp down to 70 percent in 2022 and 30 percent in 2023 after the implementation of the new SAP Cloud ERP is complete in December 2021. All these costs are available for reallocation to other places from 2024. Internal support for the future state ERP cloud system, which will replace PeopleSoft, can be provided through the new Internal Services Support Centre.

S No	Category	Sub-Category	Assumptions
71	Benefits Realization	Future State - PeopleSoft	For the years 2019 to 2023, PeopleSoft on premise licensing, maintenance and vendor support costs are assumed to be 100 percent, 100 percent, 100 percent and 30 percent of the Status Quo costs for the same years, and stable at 0 percent from 2024 to 2029. No decrease happens from 2019 to 2023 as the current system will keep running until the end of 2021. A small portion of these costs could carry over to 2022 (assumed to be 30 percent). All licensing, maintenance and support costs related to the current PeopleSoft system are assumed to be eliminated from 2023.
72	Benefits Realization	Future State - PeopleSoft	A conservative assumption is made where the infrastructure costs attributed to PeopleSoft on premise system are not ramped down at all (or kept at 100 percent of Status Quo Costs). This is because infrastructure costs are difficult to ramp down as the corporate applications share common infrastructure with numerous other applications.
73	Benefits Realization	Future State - PeopleSoft	Others costs include training, travel for training/conferences, recognition, membership and professional dues. These are expected to continue into the future state and hence not ramped down at all.
74	Benefits Realization	Future State - PeopleSoft	The CapEx benefit realization for PeopleSoft is earlier than OpEx benefit realization as the City can put a moratorium on CapEx projects/costs more easily than OpEx costs.
75	Benefits Realization	Future State - PeopleSoft	The benefits for Best-of-Breed and Core Homogenous ERP options are realized one year later than the SAP Cloud First Option due to additional time needed to procure different solutions from different vendors.
76	Benefits Realization	Future State - External IT Support Groups	Cost ramp down factors are used to calculate Future State External IT Support Group costs. These ramp down factors are assumed as a percentage of Status Quo Costs. The difference between the Status Quo costs and Future State costs is calculated as the benefit value.
77	Benefits Realization	Future State - External IT Support Groups	Future State costs for the years 2019 to 2024 are assumed to be 100 percent, 100 percent, 100 percent, 70 percent, 30 percent, 0 percent of the Status Quo External IT Support Group costs for the same years, and stable at 0 percent from 2025 to 2029. There is no External IT Support Group cost reduction expected for 2019-2022 with the program in the implementation phase. The resources would be needed to maintain and support the existing systems. Cost reductions are assumed to gradually ramp down to 70 percent in 2022, to 30 percent in 2023 and 0 percent in 2024 and onwards. This gradual ramp down is assumed to give the City two years (2022-23) to reallocate these costs.
78	Benefits Realization	Future State - External IT Support Groups	The benefits for Best-of-Breed and Core Homogenous ERP options are realized one year later than the SAP Cloud First Option due to additional time needed to procure different solutions from different vendors.
79	Benefits Realization	Future State - Other HR and EH&S Apps	The costs for these applications (except Visier) were ramped down at the same rate as PeopleSoft licensing, maintenance and vendor support costs ramp downs. As such, the ramp down percentages used are 100 percent, 100 percent, 100 percent, 30 percent and 0 percent from 2019 to 2023 and stable at 0 percent from 2024. Visier costs were not ramped down at all.
80	Benefit Realization	Process Benefits	Current state process KPI metrics are calculated based on data provided by City stakeholders and subsequently validated with City and vendor SMEs.
81	Benefit Realization	Process Benefits	APQC City Government Process classification source Framework was used as baseline for process definitions.

S No	Category	Sub-Category	Assumptions
82	Benefit Realization	Process Benefits	APQC Government Industry specific process benchmarks have been used for analysis and scaled based on City of Edmonton's revenue.
83	Benefit Realization	Process Benefits	Where appropriate, FTE headcounts for process groups were approximated based on FTE headcounts for the branches provided in the 2018 City Budget.
84	Benefit Realization	Process Benefits	FTE counts for the City's Finance branches are based on 2018 budget numbers, split into the process elements based on the APQC Process classification source Framework.
85	Benefit Realization	Process Benefits	FTE counts for the City's HR branch are based on 2018 budget numbers, split into the process elements based on the APQC Process Classification Framework.
86	Benefit Realization	Process Benefits	FTE Counts for the City's CPSS branch are based on baseline numbers from 2016 CPSS Operating Model engagement.
87	Benefit Realization	Process Benefits	Cycle time benefits tied back to effort (with an estimate of current state FTE effort x cycle time, and a future state FTE effort x cycle time, with the difference being the benefit realized for cycle time. Note that the frequency a specific activity is processed at a given cycle time is assumed and provided in the comments section.
88	Benefit Realization	Process Benefits	Based on the 2017 Annual Report published by the City, the annual operating revenue is assumed to be approximately \$3 billion. This revenue is assumed to remain constant for the financial analysis.
89	Benefit Realization	Process Benefits	The operating revenue being used is that of the City of Edmonton entity, excluding Boards and Commissions, and EPCOR revenues. The Boards, Commissions and EPCOR have separate operating structures (with their own FTEs supporting their functions such as HR) and this headcount will not be impacted by the business case.
90	Benefit Realization	Process Benefits	Comparison based on the annual revenue (FTE per \$1 billion revenue from benchmark, so FTE at \$3 billion for the City).
91	Benefit Realization	Process Benefits	In quantifying dollar values for increased process FTE capacity, blended rates were used (as the position of the resources is unknown).
92	Benefit Realization	Process Benefits	The process element benefits from FTE effort reduction are adjusted so that the same FTE effort reduction is not captured in more than one place.
93	Benefit Realization	Process Benefits	For metrics with improvement in process efficiency percent, the net increase is multiplied by the corresponding the FTE based process benefit for a representative benefit.
94	Benefit Realization	Process Benefits	A sensitivity of 50 percent (low) 70 percent (med) and 90 percent (high) was conducted, with medium case being the "expected".
95	Benefit Realization	Process Benefits	All Process Benefits are assumed to be non-harvestable and will be considered harvestable on a case-by-case basis as verified by City leadership.
S No	Category	Sub-Category	Assumptions
96	Benefit Realization	Process Benefits	The ramp up of process benefit realization is assumed to start in the first year after the completion of the corresponding roadmap initiative (i.e., Finance ERP waves for Finance process benefits). For SAP Cloud First and Core Homogenous ERP options, the benefits will be nil until the year following the completion of the corresponding initiative and then ramp up to

			15 percent, 45 percent, 75 percent, 90 percent, and 100 percent. For Best-of-Breed option, the benefits will be nil until the year following the completion of the corresponding initiative and then ramp up to 20 percent, 50 percent, 75 percent, 90 percent and 100 percent.
97	Benefit Realization	Process Benefits	Note that the "Best of Breed" scenarios benefits are assumed to vary from the "SAP Cloud First" scenario in how quickly they ramp up; this is based on the assumption that best of breed applications for each function would most likely see earlier adoption by the users in each function, and thus increase the rate of process efficiency improvement.
98	Benefit Realization	Process Benefits	Finance - A comparison was done of the total FTEs in Financial Services and Financial Strategies and Budget from the 2018 Budget (230.8) representing all Finance related processes at the City of Edmonton, and the APQC Government Sector median benchmark headcount for all Finance related processes (185.7), with the City being approximately 24.3 percent greater FTEs.
99	Benefit Realization	Process Benefits	Finance - In estimating the current state FTE count split for all of Finance process components, the current total Finance FTE count (230.8) was done by scaling the APQC Government Sector median benchmark FTE KPI for each component (FTE/\$1B revenue) by 24.3 percent to the current state benchmark FTE KPI
100	Benefit Realization	Process Benefits	Finance - Each process component was then multiplied by the \$3 billion revenue that this business case uses for the annual revenue at the City.
101	Benefit Realization	Process Benefits	Finance - The process benefits are captured as the gap between the future state KPI and the current state KPI (on the FTE/\$1 billion revenue basis) and the gap is then turned into annual benefits by multiplying by \$3 billion revenue that this business case uses for the annual revenue at the City.
102	Benefit Realization	Process Benefits	Finance - In cases where a process component (and the headcount for that component) is incorporated in more than one benefit, the annual benefit estimation is subtracted to ensure the benefits are not double counted.
103	Benefit Realization	Process Benefits	Finance - The benefits that are not FTE related are based on KPIs that are not per \$1 billion so they do not get multiplied by a factor of 3.

21 Appendix H – Detailed Breakdown of Program Implementation and Sustainment Costs

Cost Categories	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	Total
One-Time Costs	\$2.6M	\$6.5M	\$24.0M	\$20.9M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$53.9M
Ongoing Costs	\$0.0M	\$0.6M	\$3.8M	\$4.3M	\$5.4M	\$5.5M	\$8.7M	\$8.9M	\$9.3M	\$9.5M	\$9.7M	\$65.9M
Total Implementation and Sustainment Costs	\$2.6M	\$7.1M	\$27.8M	\$25.2M	\$5.4M	\$5.5M	\$8.7M	\$8.9M	\$9.3M	\$9.5M	\$9.7M	\$119.8M

22 Appendix I – Financial Analysis Breakdown by Function

Business Function	Category	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	Total
Finance	Costs	\$0.0M	\$0.0M	\$7.2M	\$2.4M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$9.7M
	Benefits	\$0.0M	\$0.0M	\$0.0M	\$1.0M	\$2.9M	\$5.1M	\$6.2M	\$7.1M	\$7.3M	\$7.5M	\$7.8M	\$45.0M
	Net value	\$0.0M	\$0.0M	-\$7.2M	-\$1.5M	\$2.9M	\$5.1M	\$6.2M	\$7.1M	\$7.3M	\$7.5M	\$7.8M	\$35.3M
HR	Costs	\$0.0M	\$2.2M	\$6.7M	\$8.3M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$17.2M
	Benefits	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.6M	\$1.9M	\$3.2M	\$3.9M	\$4.5M	\$4.6M	\$4.8M	\$23.5M
	Net value	\$0.0M	-\$2.2M	-\$6.7M	-\$8.3M	\$0.6M	\$1.9M	\$3.2M	\$3.9M	\$4.5M	\$4.6M	\$4.8M	\$6.2M
CPSS	Costs	\$0.0M	\$0.0M	\$1.1M	\$0.7M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$1.8M
	Benefits	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.1M	\$0.3M	\$0.5M	\$0.6M	\$0.6M	\$0.6M	\$0.7M	\$3.3M
	Net value	\$0.0M	\$0.0M	-\$1.1M	-\$0.7M	\$0.1M	\$0.3M	\$0.5M	\$0.6M	\$0.6M	\$0.6M	\$0.7M	\$1.5M
Other Program	Costs	\$2.6M	\$4.9M	\$12.8M	\$13.8M	\$5.4M	\$5.5M	\$8.7M	\$8.9M	\$9.3M	\$9.5M	\$9.7M	\$91.1M
	Benefits	\$0.0M	\$0.0M	\$0.6M	\$2.7M	\$10.5M	\$18.7M	\$20.3M	\$21.4M	\$20.6M	\$21.8M	\$20.8M	\$137.3M
	Net value	-\$2.6M	-\$4.9M	-\$12.2M	-\$11.1M	\$5.1M	\$13.1M	\$11.6M	\$12.5M	\$11.3M	\$12.3M	\$11.1M	\$46.2M

23 Appendix J – Financial Analysis for All Options

Option Name	Category	Segment	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	Total
1. Status Quo	Costs	TCO	\$24.2M	\$22.5M	\$22.3M	\$25.8M	\$28.0M	\$31.6M	\$30.5M	\$31.2M	\$31.0M	\$33.9M	\$33.1M	\$314.1M
		Program Costs	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M
	Benefits	TCO Reduction	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M
		Process Efficiencies	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M
	Net value		\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M	\$0.0M
2. Core Homogeneous ERP	Costs	TCO	\$26.7M	\$29.6M	\$49.5M	\$48.4M	\$22.9M	\$18.5M	\$18.9M	\$18.8M	\$19.7M	\$21.6M	\$22.1M	\$296.6M
		Program Costs	\$2.6M	\$7.1M	\$27.8M	\$25.2M	\$5.4M	\$5.5M	\$8.7M	\$8.9M	\$9.3M	\$9.5M	\$9.7M	\$119.8M
	Benefits	TCO Reduction	\$0.0M	\$0.0M	\$0.6M	\$2.7M	\$10.5M	\$18.7M	\$20.3M	\$21.4M	\$20.6M	\$21.8M	\$20.8M	\$137.3M
		Process Efficiencies	\$0.0M	\$0.0M	\$0.0M	\$1.0M	\$3.6M	\$7.2M	\$9.9M	\$11.6M	\$12.5M	\$12.8M	\$13.2M	\$71.7M
	Net value		-\$2.6M	-\$7.1M	-\$27.2M	-\$21.6M	\$8.7M	\$20.3M	\$21.4M	\$24.1M	\$23.8M	\$25.1M	\$24.2M	\$89.2M
3. SAP Cloud First	Costs	TCO	\$32.9M	\$49.8M	\$45.4M	\$21.2M	\$17.3M	\$20.0M	\$18.0M	\$19.0M	\$19.7M	\$21.6M	-	\$264.9M
		Program Costs	\$8.7M	\$27.9M	\$25.2M	\$5.4M	\$5.5M	\$8.7M	\$8.9M	\$9.1M	\$9.3M	\$9.5M	-	\$118.4M
	Benefits	TCO Reduction	\$0.0M	\$0.7M	\$2.2M	\$9.9M	\$16.2M	\$20.3M	\$21.4M	\$21.4M	\$20.6M	\$21.8M	-	\$134.5M
		Process Efficiencies	\$0.0M	\$0.0M	\$0.9M	\$3.5M	\$7.0M	\$9.6M	\$11.3M	\$12.1M	\$12.5M	\$12.8M	-	\$69.7M
	Net value		-\$8.7M	-\$27.2M	-\$22.2M	\$8.1M	\$17.6M	\$21.2M	\$23.8M	\$24.4M	\$23.8M	\$25.1M	-	\$85.8M
4. Best of Breed	Costs	TCO	\$24.7M	\$31.3M	\$52.3M	\$46.9M	\$24.6M	\$20.3M	\$20.8M	\$20.7M	\$21.5M	\$23.4M	\$24.0M	\$310.6M
		Program Costs	\$0.5M	\$8.8M	\$30.7M	\$23.8M	\$7.1M	\$7.4M	\$10.6M	\$10.8M	\$11.1M	\$11.4M	\$11.7M	\$133.8M
	Benefits	TCO Reduction	\$0.0M	\$0.0M	\$0.6M	\$2.7M	\$10.5M	\$18.7M	\$20.3M	\$21.4M	\$20.6M	\$21.8M	\$20.8M	\$137.3M
		Process Efficiencies	\$0.0M	\$0.0M	\$0.0M	\$1.9M	\$6.0M	\$10.0M	\$11.8M	\$12.1M	\$12.5M	\$12.8M	\$13.2M	\$80.3M
	Net value		-\$0.5M	-\$8.8M	-\$30.1M	-\$19.2M	\$9.3M	\$21.3M	\$21.5M	\$22.7M	\$22.0M	\$23.3M	\$22.3M	\$83.8M

Enterprise Commons Updates

City Council

February 22, 2022

Chris Hodgson, Branch Manager

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Enterprise
Commons

Edmonton

Roadmap

Enterprise
Commons

Edmonton



Current Status



SIMPLIFY
PROCESSES



We have taken measures to simplify processes, yet the City still has unique requirements



COMPLEX
REQUIREMENTS

COVID-19 IMPACTS



Pandemic impacts resource availability throughout the project



VIRTUAL
ENVIRONMENT

ADDITIONAL
TESTING



Further system integration testing and payroll comparisons to mitigate risk of failure(s) and higher project quality

Options, Risks and Outcomes

- Administration recommends an increase to the program budget to facilitate an extension of the project schedule and a revised “go-live” date in Q4 2022
- An increase in funding allows for the continued work with our system integration partner, Deloitte, to complete additional systems integration testing cycles and carry out other risk mitigation activities for payroll components.
- Recommend that discussion related to ongoing negotiations or detailed implications of not funding this initiative also remain in camera



Questions?

COLLABORATIVE ECONOMIC DEVELOPMENT

Initiative Orientation

RECOMMENDATION

That the February 22, 2022, Urban Planning and Economy report UPE01044, be received for information.

Report Purpose

Information Only.

Council is being informed of the current work the City of Edmonton is conducting with our regional municipal partners. This collaborative initiative will help generate Regional Prosperity in alignment with ConnectEdmonton.

Executive Summary

- This report provides Council with an overview of the Collaborative Economic Development initiative, the ongoing activities and planned future phases.
- The Edmonton Metropolitan Region's 13 municipalities have agreed to work together through the Collaborative Economic Development initiative to attract business investment, as well as create jobs and work toward a sustainable future.
- Together, the municipalities will develop a model of economic development that will achieve shared success by providing the municipalities opportunities to invest in projects outside their municipal boundaries and receive direct returns on their investments.
- Municipalities participating in Collaborative Economic Development will pool their resources to help better align investment opportunities and development sites with local investment needs.

REPORT

The City of Edmonton is committed to the success of the Edmonton Metropolitan Region by working together with its neighbours to attract investment, build communities and drive innovation.

COLLABORATIVE ECONOMIC DEVELOPMENT

The 13 members of the Edmonton Metropolitan Region, who are working together with the shared goal to facilitate business investment and support COVID-19 recovery by creating jobs and building for the future, are:

City of Beaumont	City of Leduc	City of St. Albert
Town of Devon	Leduc County	City of Spruce Grove
City of Edmonton	Town of Morinville	Town of Stony Plain
City of Fort Saskatchewan	Parkland County	Strathcona County
		Sturgeon County

The Collaborative Economic Development (CED) initiative is an innovative scalable model to advance borderless economic growth across the entire region. It provides a framework for municipalities to invest in projects outside of their municipal boundaries and share the direct financial benefits (e.g. tax revenue) of jointly developed 'shovel ready' land that is tailored to, and successfully attracts, non-residential investment opportunities.

The overarching goals of the CED initiative are:

- Attract new non-residential investment to the region.
- Improve coordination between the municipalities in the region so that investors view them as cohesive.
- Enable businesses to make investment decisions that align with their business needs without making trade-offs (e.g. location, taxes, service levels, etc).

Strategic Alignment

The CED initiative supports The City Plan by working in partnership with the municipal, industry, and business community to strengthen and diversify Edmonton's economy through:

- promoting and developing regional opportunities for growth and investment,
- improving multi-modal connectivity with neighbours, and
- advancing Edmonton's role as a major transportation, logistics, and employment hub within the national and international economies.

This work also directly contributes to the City's Economic Action Plan, and in particular action 23 (advance collaborative Shared Investment for Shared Benefit initiatives with regional partners). A key outcome of the CED initiative is to help area residents to thrive where they live - which directly supports the City's guiding values.

Collaborative Economic Development in practice

The following six guiding principles in the MOU, which was signed by the region's municipalities in April 2021, are fundamental to the project. By joining the initiative, the partners agree:

1. To share revenue proportionate to level-of-investment.

COLLABORATIVE ECONOMIC DEVELOPMENT

2. To be prepared to invest in property outside of municipal boundaries.
3. To focus on attraction and expansion of net new non-residential growth.
4. To build upon regional agreements surrounding economic development.
5. That all policies and processes in the focus areas (potential locations based on demand) will be analyzed and optimized whenever possible.
6. That participation is voluntary.

There is an existing need to reduce red tape at the regional level and support provincial economic development activities. The CED initiative will strengthen existing collaboration efforts and complement the work already being done by various orders of government, economic development organizations and industry to attract and support investment.

This initiative is not creating another economic development organization; it has been designed to supplement and coordinate existing economic activities and to bridge any gaps. The work of the CED initiative complements the work done by Edmonton Global through reducing intermunicipal competition (race-to-the-bottom competition) between regional municipalities. The region's combined resources can now be directed towards meeting the needs of each investor and increasing jobs. In turn, this will reduce the regulatory burden on businesses and developers by eliminating duplication of services.

COMMUNITY INSIGHT

Informing the CED initiative to this point and in future work is what we have heard from the community as represented by the member municipalities. Members have emphasized that partnership and collaboration are necessary to realize each municipality's individual economic goals. The parties concur that the Edmonton Metropolitan Region's municipalities have a better chance of success if they take a shared approach that builds on individual strengths.

A public announcement and dedicated website are part of the ongoing public communications regarding the Collaborative Economic Development initiative. Major announcements and website updates are planned for future project milestones. These will primarily be facilitated by the project team, with specialized support as needed from individual partners. To implement the Collaborative Economic Development Framework, various public engagement activities - including targeted stakeholder engagement with financial experts, economic development groups and the business community - will be conducted in Q3 and Q4 2022.

GBA+

The team will apply a GBA+ lens throughout the development of the CED framework. This GBA+ analysis will be reflected in the project plan and ultimately integrated into the project deliverables. Although the framework is still being developed, the most likely use of GBA+ principles will be in the application of financial and non-financial incentives.

Prior to receiving any incentive through CED, potential investors will need to demonstrate that they will meet specific criteria to benefit both the regional economy and contribute to the regional community. GBA+ principles will be incorporated into this criteria.

COLLABORATIVE ECONOMIC DEVELOPMENT

Some examples of the incentive criteria may include:

- Number of jobs and expected salary/wage,
- Meeting supply chain needs and sector alignment,
- GBA+ focused items such as:
 - [GBA+] Employment of target cohorts (e.g. First Nations, recent immigrants)
 - [GBA+] Significant level of ownership from these same groups

Finally, the CED model is inclusive and can thrive with the participation from non-municipal organizations such as First Nations and religious communities.



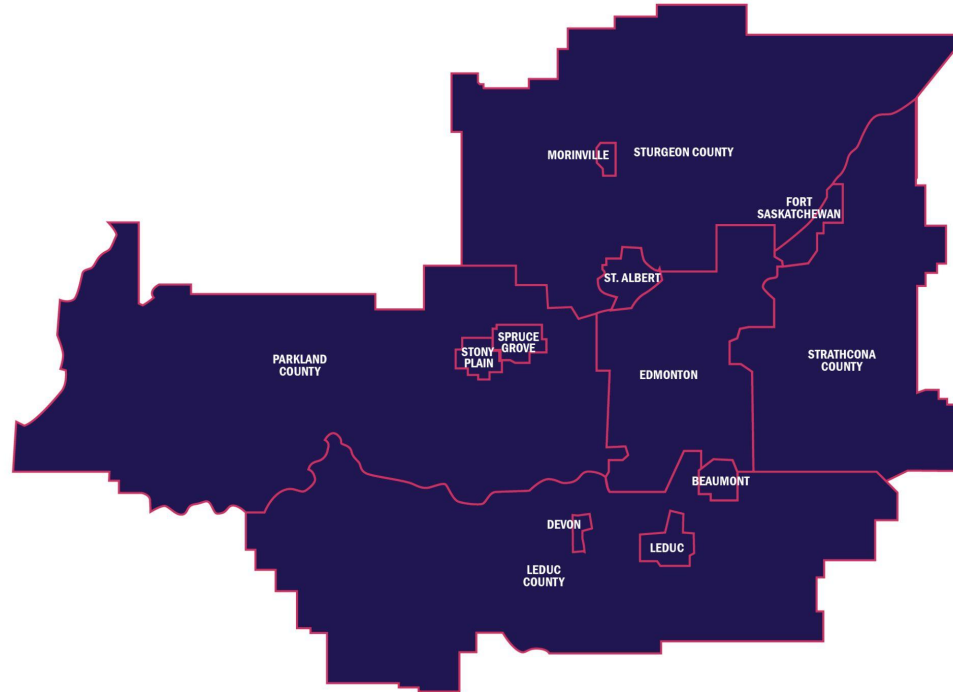
Initiative Orientation

UPE1044

Urban Planning & Economy

February 22, 2022

Edmonton Metropolitan Region



CED Overview

Highlights of the CED Initiative

CED Overview

- Economic development contributes to a **region's economic diversity** and resilience by **attracting new businesses** and **jobs**
- Regional economic development **can reduce** intermunicipal competition, boost competitiveness, attract investment and generate more direct revenue for local governments
- CED is a **positive opportunity** for the region to work together to drive our economy forward, create jobs, support economic recovery and future growth by making the region more attractive for business investment

CED Overview

- **Competitive offering** tailored to meet business investment needs and attract non-residential growth and investment opportunities
- Produce an approach to **jointly develop** shovel ready land and incentivize businesses to locate there
 - Establish business appropriate infrastructure, utilities and service levels
 - Reduce red tape and costs to business by streamlining service delivery and leveraging municipal strengths
- Develop **a net new revenue sharing mechanism** proportional to level of investment

Value Proposition

- Opportunity to **generate revenue** from non-residential growth outside our individual municipal boundaries
- **Attract** large impact investments at lower individual costs
- **Create** more competitive offerings across the region
- **Encourage** responsible growth (EMRB Growth Plan)
- **Reduce** intermunicipal competition

EDMONTON GLOBAL

SUPPORTS *in investment attraction*

MUNICIPAL & SUBREGIONAL EDO & ENTITIES

COORDINATES & STREAMLINES
to enhance investment readiness

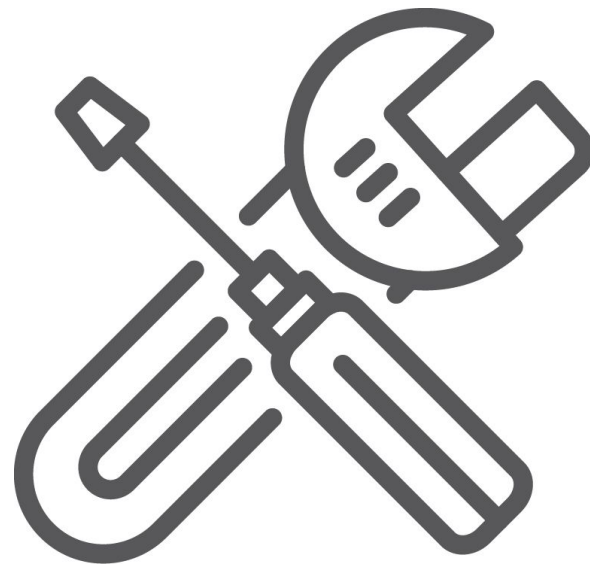
EDMONTON METROPOLITAN REGIONAL BOARD

ALIGNS *with the Growth Plan and Land Use*

Conceptual Framework

Together, the partners will:

1. Develop a series of tools and policies to attract additional non-residential business investment. This could include incentives, process improvements, infrastructure investment etc.
2. Identify investment locations throughout the region aligned with key sector opportunities
3. Work with partners to attract businesses to these locations
4. Share the costs associated with getting identified land ready for the business investment
5. Share in the direct benefits from the new business investment, such as property tax revenues



Memorandum Of Understanding

Commitment to Develop a CED Framework

Memorandum Of Understanding

- Signed April 12, 2021
- Non-binding
- Agreed upon scope is for the development of the framework
- Land development and incentive costs are outside the scope of the MOU and would be a future Council decision
- The framework is being developed so that other partners can participate. Their input will be essential.



Six Guiding Principles

By joining this initiative, the partners agree:

1. To share revenue proportionate to level-of-investment
2. To be prepared to invest in property outside of municipal boundaries
3. To focus on attraction and expansion of net new non-residential growth
4. To build upon regional agreements surrounding economic development (e.g. Edmonton Global's key sectors)
5. That all policies and processes in the Focus Areas will be analyzed and optimized whenever possible
6. That participation is voluntary



CED Project Update

Project Overview

- **Working Group** - includes staff from 6 partner municipalities
 - Responsible for the development of project deliverables
- **Liaison Committee** - includes members from all 13 partner municipalities
 - Provides strategic and quality guidance
- **Steering Committee** - is comprised of 13 partner CAOs
 - Provides strategic advice and approves project deliverables
- **Oversight Committee** - is comprised of 13 partner Mayors
 - Provides strategic direction and political guidance

Project Overview

Completed

Phase 1 and Phase 2:

- Memorandum of Understanding
- Communications Plan
- Investment Attraction Best Practices Review and Summary
- Cost and Revenue Sharing Model Review and Recommendations
- Investment Attraction / Incentive Feasibility Analysis and Recommendations



Project Overview

Current Activities

Phase 3:

- Detailed Site Analysis and Selection
- Process Improvement Analysis
- Incentive Framework Development
- Validation of Key Model Assumptions

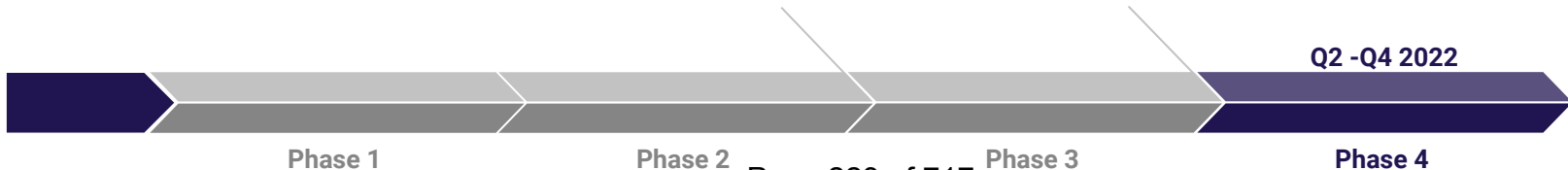


Project Overview

Future Activities

Phase 4:

- Municipal Process Improvement Recommendations
- Financial Modeling
- Implementation Plan
- Project Closure



Thank You

Ian Gallagher, Regional Program Manager
Urban Planning & Economy

CED Project Approach

Straw Dog of the initiative.

Location Identification and Selection

1. Identify potential focus areas based on market demand
 - Determined through validated leads
 - Aligned with Edmonton Global
 - Locations provided by partners
 - Scale of Focus Areas: Quarter Section
 - Location Type: Greenfield / Brownfield
 - Owner: Private / Developer / Municipal

Partners may participate in any investment opportunity regardless of its location



Location Identification and Selection

2. Score and rank Focus Areas using an objective and repeatable criteria

Examples:

- Locational advantages
- Site readiness / existing infrastructure
- Aligned with existing plans

SCORE						

Location Identification and Selection

3. Develop a Focus Area Plan to make select locations business ready
 - Identifies infrastructure and servicing needs
 - Identifies possible incentives
 - Number of plans to be determined



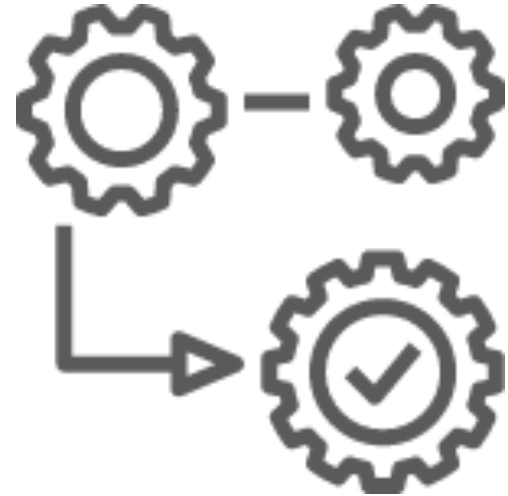
Development and Operation

4. Plan and determine partners contributions
 - Determine detailed costs
 - Identify contributing partners, based on desire to participate
 - Determine contribution amounts for each participating partner
 - Enter into a legally binding partnership agreement



Development and Operation

5. Implement plan and provide continuous optimization/evaluation
 - Collaborate with economic development stakeholders on ways to market focus areas (e.g. Edmonton Global)
 - Implement the Focus Area Plan
 - Operate for the duration of the investment horizon
 - Monitor, evaluate, and report





CITY COUNCIL REPORT

Office of the Integrity Commissioner Annual Report (September 2020 - December 2021)

Administration Recommendation

That the February 7, 2022, Office of the City Clerk report OCC0988, be received for information.

History

At the February 7, 2022, City Council meeting, the February 7, 2022, Office of the City Clerk report OCC0988, was postponed to the February 22/24, 2022, City Council meeting.

Attachment

February 7, 2022, Office of the City Clerk report OCC0988.



Office of the Integrity Commissioner Annual Report (September 2020 - December 2021)

RECOMMENDATION

That the February 7, 2022, Office of the City Clerk report OCC0988, be received for information.

Report Purpose

Information only.

REPORT

The Office of the Integrity Commissioner provides an annual report to City Council. This reporting cycle has been adjusted to align with the calendar year moving forward.

ATTACHMENT

1. Annual Report - Office of the Integrity Commissioner September 3, 2020 - December 31, 2021

Office of the Integrity Commissioner

integrity.commissioner@edmonton.ca

ANNUAL REPORT

OFFICE of the INTEGRITY COMMISSIONER

The City of Edmonton

Council Code of Conduct Bylaw 18483

(“Code of Conduct” or “Code”)

For the period September 3, 2020 to
December 31, 2021 (“Reporting Period”)

INTEGRITY OFFICE

On September 5, 2018, Edmonton City Council appointed Jamie Pytel as the City's Integrity Commissioner and Brent Rathgeber as the Ethics Advisor. These positions form an independent Integrity Office which supports City of Edmonton Council Members with maintaining the high level of integrity that they and the public have come to expect. Together, Jamie and Brent administer the *Council Code of Conduct* (the "Code").

The Integrity Commissioner and the Ethics Advisor are not City employees. The Integrity Commissioner was appointed by Council under Bylaw 18567 *Integrity Commissioner Bylaw*, which delegates the duty of receiving Code complaints and carrying out investigations to the Integrity Commissioner. The Integrity Commissioner reports directly to Council and, in addition to investigations, provides proactive advice with respect to the Code and related procedures, including best practices relative to codes of conduct and elected officials.

The Ethics Advisor provides legal advice to Councillors regarding the Code and individual ethics. The Ethics Advisor also provides educational programs and materials to Council Members and their staff upon request.

Prior reporting periods for this report ran from September to September. The current reporting period was extended to bring the annual report in line with the calendar year and annual budget. This report covers the period from September 2020 to December 2021.

The budget for the Integrity Office for the Reporting *Period* was \$200,000.00. The total expenditures for the Integrity Office for this 15-month Reporting Period was \$167,534.10. The total expenditures for the previous 12-month Reporting Periods were \$132,473.57 and \$132,164.01.

INTEGRITY COMMISSIONER ACTIVITIES

Complaints and Enquiries

In the Reporting Period, the Integrity Commissioner received 38 complaints, six of which were investigated. Below is a summary of the investigation activity for this and prior periods:

REPORTING PERIOD	COMPLAINTS RECEIVED	COMPLAINTS INVESTIGATED	FINDINGS	SANCTIONS IMPOSED
Sept 2018 to Sept 2019	16	6	None	None
Sept 2019 to Sept 2020	20	12	9 investigations resulted in findings of multiple Code breaches, including conduct that was disrespectful, lacking in decorum and for posting misleading information about Council decisions on social media.	None
Sept 2020 to December 2021	38	6	<p>6 investigations resulting in findings of violations, including:</p> <p>Council Member violated the Code when he used electronic mail addresses used for his official Councillor duties for his personal election campaign activities and communications (4 complaints).</p> <p>Council Member deliberately retaliated against Code complainants; publicly ridiculed and tried to intimidate Code complainants and published on social media information that was false and misleading about prior Code complaints; his social media posts lacked decorum, were disrespectful and misleading (2 complaints).</p>	None

The balance of the complaints received in the current Reporting Period that were not investigated, included:

- Complaints outside the Integrity Commissioner’s jurisdiction or did not allege facts that, if proven true, would be a violation of the Code, such as:
 - complaints about individuals who were not current Council Members;
 - complaints about a Council Member’s staff member;
 - concerns about social media activity not covered by the Code;
 - a complaint governed by the *Procedures Bylaw*, not the Code;
 - conduct purely in the realm of campaigning / political commentary and not about official duties, City business or the Code;
- Complaints with deficient or incomplete information, such as not providing identifying information and contact information of the Complainant, and therefore could not be investigated;
- Complaints that were resolved informally, including the Integrity Commissioner suggesting a path forward short of an investigation, a Council Member providing information to Complainants about their complaints and Complainants choosing not to proceed;
- Eleven complaints were received and suspended during the 90-day period leading up to the municipal election. All 11 complaints were dismissed post-election as 10 related to Council Members no longer on Council and 1 did not warrant investigation.

Code Amendments

Each year, the Integrity Commissioner considers whether any amendments to the Code or related procedures are advisable. This year, possible amendments either to the Code or related procedures will be presented for discussion at upcoming City Council meetings in consultation with the City Solicitor’s Office and the City Clerk’s Office.

Based on complaints made during the campaign period last year, the Integrity Commissioner undertook to apprise Council of concerns by some members of the public that the Code permits suspension of Code investigations in the 90 days leading up to the municipal election. Concerns were also raised around endorsement of candidates. These will be topics for discussion at an upcoming presentation to Council, along with other topics of interest.

Integrity Commissioner Activity

In response to a Council action item, in January 2021 the Integrity Commissioner presented to Council on the advisability of having a social media policy for Council. Council decided to not pursue such a policy.

In February 2021, the Integrity Commissioner participated in a Council information session with the Ethics Advisor regarding Code requirements and the municipal election, following which the Integrity Commissioner provided Council with written guidance on how to navigate campaign activity, particularly social media activity, as it relates to Code requirements.

In September 2021, the Integrity Commissioner invited Council Members to provide feedback directly to her on the Code and the processes related to the Code. **The Integrity Commissioner wishes to extend this invitation and invite current Council Members to contact her directly if they wish to meet individually with feedback about the Code or this office.**

In November 2021, the Integrity Commissioner along with the Ethics Advisor presented at Council Orientation with respect to the Code. This was an introductory session. We look forward to continuing to provide information to Council and having conversations with Council about the Code.

ETHICS ADVISOR'S ACTIVITIES

The Ethics Advisor continues to meet with Councillors at their request and at their convenience. The Ethics Advisor provided advice to Members of Council, always on a confidential basis. He met with Council Staffers, as a group, to explain in detail the Code of Conduct and interpretation of various sections. During the Reporting Period, the Ethics Advisor provided confidential advice to Councillors or their designated representative on approximately 65 separate occasions (including supplemental advice). The advice was provided primarily orally (by telephone) or on in writing (by e-mail) depending on the Councillor's preference and timelines. On rare occasions, the advice was given during a face-to-face meeting with the Councillor and at the Councillor's request.

The Ethics Advisor assisted Councillors, who were the subject of a Complaint Investigation. This assistance might include Complaint Review, statement preparation and/or attendance with the Councillor when being interviewed by the Integrity Commissioner.

Interactions with Councillors or their designated representatives were down slightly during the current reporting period as compared to the last, notwithstanding that the Reporting Period

extended beyond a calendar year. This is counted for almost exclusively by COVID-19 and the resulting decline in invitations to Councillors to attend events and attractions (and the questions surrounding the suitability of accepting those gifts).

Regardless, Part L of *the Code of Conduct* dealing with “Gifts and Benefits” was still the section of the Code generating the most inquiries. However, respectful communications and social media posts are accounting for an increasing number of inquiries to the Ethics Advisor.

Predictably, event attendance continued to generate the most inquiries and the most confusion. The purpose of 1 (g) of Part L of the Code, required a gift of admission to, or food and beverages, at an event to be “offered by the entity or a representative or member of the entity, responsible for organizing or presenting the event.”

The purpose behind this requirement, ostensibly, was to prevent individuals or organizations from purchasing access to or influence with elected officials. This correlation between event attendance and influence purchasing is debatable and perhaps even counterintuitive and seems unintentionally inequitable when applied to the arts community and other non-profit organizations, who may lack the resources to offer complimentary tickets to the events they sponsor and promote.

Accordingly, it was recommended to Council and accepted that the giftor be the sponsor of the event be deleted from the Code.

As 2021 was an election year, the Ethics Advisor and the Integrity Commissioner provided an extensive pre-election briefing to Councillors and their staffs. Topics involved the interaction between the Code of Conduct and the various Election bylaws and statutes.

Once the new Council was sworn in, the Ethics Advisor and the Integrity Commissioner participated in Council orientation and walked the new Councillors through the Code requirements. The Ethics Advisor will be setting up a number of one-on-one meetings with Councillors and their staff. These sessions will be directed primarily, but not exclusively, to the new Councillors, who will be less familiar with the Code of Conduct and the investigative process.

Finally, the Ethics Advisor met with the Council on several occasions but generally virtually and on fewer occasions due to COVID-19. The Ethics Advisor will continue to provide input and advice and discuss such unresolved issues as the future establishment of a Lobbyist Registry for Edmonton City Council and further amendments to *the Code of Conduct*, (including gift and event acceptability).

In summary, the Integrity Office is now over three years old; and most, but not all, of the bugs have been worked out. The Ethics Advisor believes that the Office and the *Code of Conduct* are generally working as intended and may have even exceeded expectations. This is evidenced by the very few substantiated breaches of the *Code of Conduct* since the inception of the Integrity Office. However, some fine tuning may still be required and even a well-functioning program can always be improved.

As always, the Ethics Advisor finds his role challenging and rewarding. It is an honour to contribute to democracy by promoting ethical conduct by elected officials.

CLOSING COMMENTS

The number of complaints received are within the normal level of activity of Canadian cities of similar population and size of this Council. However, this is a proactive office in which we strive to provide advice and information to avoid any potential Code complaints and violations. We continue to invite feedback from and dialogue with Council about topics related to the *Council Code of Conduct*.

We would like to acknowledge with gratitude the Office of the City Clerk for providing exceptional support and assistance over these past three years.

Respectfully Submitted

Jamie Pytel
Integrity Commissioner

Brent Rathgeber
Ethics Advisor



CITY COUNCIL REPORT

Direct Control (DC1) Zoning - Glenora Heritage Character Area

Motion on the Floor

Moved A. Knack - S. Hamilton (Made at the January 24/26, 2022, City Council meeting):

That Administration resume work to prepare Direct Control (DC1) Zoning for the Glenora Heritage Character Area, in alignment with The City Plan goals of increased density while encouraging the retention of heritage resources and ensuring new development respects the form and massing of the Garden City Suburb and that this work be funded up to \$100,000 by the 2021 Council Contingency.

History

- At the February 7/9, 2022, City Council meeting, the above-noted Motion on the Floor was postponed to the February 22/24, 2022, City Council meeting.
- At the January 24/26, 2022, City Council meeting, the above-noted Motion on the Floor was postponed to the February 7/9, 2022, City Council meeting.
- At the January 24/26, 2022, City Council meeting, the January 18, 2022, Urban Planning and Economy UPE00724 was considered.

Related motion passed at the January 22/24, 2022, City Council meeting

That Administration prepare an unfunded service package for consideration as part of the 2023-2026 budget process to fund preparation of a new Historic Resource Management Plan as outlined in Attachment 2 of the January 18, 2022, Urban Planning and Economy report UPE00724.

Attachment

January 18, 2022, Urban Planning and Economy UPE00724

HERITAGE RESOURCE MANAGEMENT STRATEGY

RECOMMENDATION

That Administration prepare an unfunded service package for consideration as part of the 2023-2026 budget process to fund preparation of a new Historic Resource Management Plan as outlined in Attachment 2 of the January 18, 2022, Urban Planning and Economy report UPE00724.

Report Purpose

Council decision required.

Urban Planning Committee is being informed about plans for a new heritage management strategy. A new heritage management strategy will improve the delivery of a service to Edmontonians and address operational effectiveness to ensure alignment with the corporate goals. Additionally, Urban Planning Committee is being informed about the status of the Glenora Heritage Character Rezoning Project.

Previous Council/Committee Action

At the June 29, 2021, Urban Planning Committee meeting, the following motion was passed:

That Administration pause work on the Glenora Heritage Area DC1 and bring a report to Committee that identifies resources necessary to complete a new strategic and targeted approach to a Heritage Resource Management Strategy that outlines options and tools to address the conservation of heritage resources citywide.

Executive Summary

- To implement direction in The City Plan about “preserving and enhancing heritage,” Administration will prepare an unfunded service package to prepare a new Historic Resource Management Plan.
- Administration will continue to pause work on the Glenora Heritage Area Rezoning project while preparing the Historic Resource Management Plan.

Heritage Resource Management Strategy

REPORT

Heritage planning enhances a community's identity and attractiveness. Heritage planning also preserves the resources and energy expended by prior generations and remembers the stories of those generations. "Heritage" refers to what a community has inherited from the past. By identifying, protecting and celebrating diverse aspects of our cultural inheritance, heritage planning helps turn a city into a place of meaning and belonging.

Background

The Inventory and Register of Historic Resources in Edmonton is a list of significant heritage buildings and other historical resources (e.g. bridges). The Inventory is a list of heritage resources that merit conservation, but are not legally protected from being altered or demolished. If the resource is placed on the Register by receiving designation as a Municipal Historic Resource by way of a City Council-approved bylaw, legal protection is granted in accordance with City Policy C450B - Policy to Encourage the Designation and Rehabilitation of Municipal Historic Resources in Edmonton. Under the *Historical Resources Act*, the City must provide financial compensation to a property owner if it designates a property. As a result of this compensation requirement, the City's heritage program focuses on giving financial incentives to encourage owners to voluntarily designate their properties.

The Inventory and Register contains approximately 1,100 properties, 168 of which are legally protected as designated Municipal Historic Resources. Examples of buildings preserved by the program include: the Hotel Macdonald, McLeod Building, Garneau Theatre, Queen Elizabeth II Planetarium and Oliver Exchange. The program receives \$2.35 million annually through the capital/operating budget for rehabilitation and maintenance grants and has disbursed over \$18 million during the life of the program. Attachment 1 summarizes heritage planning milestones in Edmonton.

Since the inception of the heritage planning program, interest has successfully grown. Some developers now build heritage designation (and the associated grant incentives) into their business model. While the heritage grant budget has been increased over the years, greater demand and increased construction costs have put more strain on funding available for grants to property owners. The number of heritage planners (two) is the same as it was 20 years ago despite significant growth in the program.

Policy Direction

"Preserve" is one of the six guiding values of The City Plan. The associated city-building outcome is that "Edmonton protects and enhances its image and identity through heritage" and the intention statement that flows from this intention is to "Promote Edmonton's history and encourage a sense of local identity by preserving and enhancing heritage."

This direction must exist in balance with an ambitious redevelopment agenda for Edmonton's existing neighbourhoods. Construction of new, denser development is sometimes done through the demolition of historic resources. The City Plan makes clear, however, that redevelopment needs to be thoughtfully balanced with heritage considerations. The City Plan states: "Not

Heritage Resource Management Strategy

everything in The City Plan is about making something new. Much of our work is about keeping things the same. A critical part of The City Plan is rooted in stewardship and preserving the attributes most valued by Edmontonians today that were handed down to us from previous generations.”

New Historic Resource Management Plan

A recommendation of the December 2021 audit of the heritage planning program is to update the heritage program’s guiding documents.

The Historic Resource Management Plan was prepared in 2009 and is the primary guiding document to manage historic resources citywide. Since that time, significant events have altered how we look at historic buildings and commemorate the past.

- Edmonton has declared a climate emergency, which places new urgency on preserving the embodied energy (total energy required to produce, deliver and assemble building materials) of existing buildings, since energy consumption produces CO2 and greenhouse gas emissions.
- The Truth and Reconciliation Commission has called for Indigenous history, values and memory practices to be incorporated into government heritage frameworks.
- Social change movements have led to reinforced commitments to equity, diversity and inclusion.

Edmonton’s heritage program should reflect a wider lens of Edmonton’s history and recognize the contributions of currently underrepresented and marginalized people, places and cultures.

Administration accordingly plans to prepare a new Historic Resource Management Plan to:

- Determine priorities for managing heritage resources across the city in light of constrained resources.
- Better commemorate Edmonton’s diverse history.
- Identify trade-offs and potential mitigations to achieve the delicate balance of heritage preservation and redevelopment as outlined in The City Plan.

The new Historic Resource Management Plan will involve analysis, stakeholder involvement and citywide engagement. The process is expected to take 18 months and would run from First Quarter 2023 to Second Quarter 2024 if funded to commence in 2023. Attachment 2 provides more information about the proposed content of the resulting strategy document and the process that will be used for its preparation.

Glenora Heritage Character Area Rezoning

On June 29, 2021, in response to Administration's report UPE00583 Glenora Heritage Character Area Rezoning, Urban Planning Committee directed Administration to pause work on the Glenora Heritage Character Area rezoning project. At that time, Administration had prepared a draft Direct Development Control (DC1) Provision through consultation with Glenora residents and the Old Glenora Conservation Association.

As currently drafted, the DC1 provision would preserve aspects of the Garden Suburb character of Glenora, especially related to lot widths, building size, front setbacks, roof styles, entrance and

Heritage Resource Management Strategy

window orientation. It would restrict semi-detached housing in most of the area but allow increased building height and a limited number of new commercial uses in homes listed on the City's heritage inventory to encourage their retention. To provide more opportunity for redevelopment, the DC1 provision would not apply near the future 142 Street LRT stop or along the western portion of 102 Avenue. The DC1 provision was drafted with a recognition of the Carruthers caveat, a legal instrument that applies to portions of the Glenora neighbourhood, is more restrictive than the current zoning, and that some property owners have enforced through civil litigation.

Proceeding with the Glenora DC1 Heritage Character Area rezoning as currently drafted would limit development potential in Glenora in the aforementioned ways, but it could help maintain the area's distinctive historic development pattern. Alternatively, not proceeding with the DC1 rezoning would give time for the Historic Resource Management Plan to be prepared and for the Zoning Bylaw Renewal project to be completed before revisiting the matter of Glenora neighbourhood character. Not proceeding may also lead to ongoing community tension as individual rezoning applications go to City Council for decision without a unifying and coordinated approach.

Although the proposed Historic Resource Management Plan may not identify new tools to address character issues in Glenora, Administration will continue to pause work on the Glenora project while focussing on the Historic Resource Management Plan.

The most effective tool for preserving heritage buildings in Glenora (and citywide) is by designating properties as Municipal Historic Resources. In the area of the draft Glenora DC1 provision, only three of the 104 qualifying properties (2.9 per cent) have been designated as Municipal Historic Resources. The new Historic Resource Management Plan will comprehensively establish heritage preservation as a citywide priority.

Budget/Financial Implications

The preparation of a new Historic Resource Management Plan is expected to cost \$420,000 (\$200,000 for strategic planning and heritage consultants, \$170,000 for temporary staff for the duration of the project, and \$50,000 for communications and engagement, including Indigenous engagement). The heritage program also requires one additional permanent Full Time Equivalent employee (an estimated annual cost of \$108,000) to successfully manage the increase in program workload. Upon Council's direction, Administration will bring forward an unfunded service package for consideration as part of the 2023 to 2026 Budget process.

COMMUNITY INSIGHT

This report was informed by Edmonton-area dialogue about how history is commemorated, conversations with stakeholders in Edmonton's heritage ecosystem (especially the Edmonton Historical Board and the Edmonton Heritage Council), and social media listening about the Glenora DC1 Heritage Character Area Rezoning since the project was paused in June 2021. Heritage stakeholders have been consistent in calling for more resources for heritage planning in Edmonton and an update to the Historic Resource Management Plan.

Heritage Resource Management Strategy

GBA+

Historical resources have the potential to help communicate the story of Edmonton's diverse history, and thus add to the meaning of our urban places and quality of life of Edmontonians now and in the future. Currently, however, the City's Inventory and Register of Historic Resources does not reflect a broad spectrum of Edmonton's diversity. Women and other marginalized groups, including gender minorities and intersectional identities whose heritage is more intangible, are underrepresented in the Inventory and Register and current activities to commemorate history through heritage preservation.

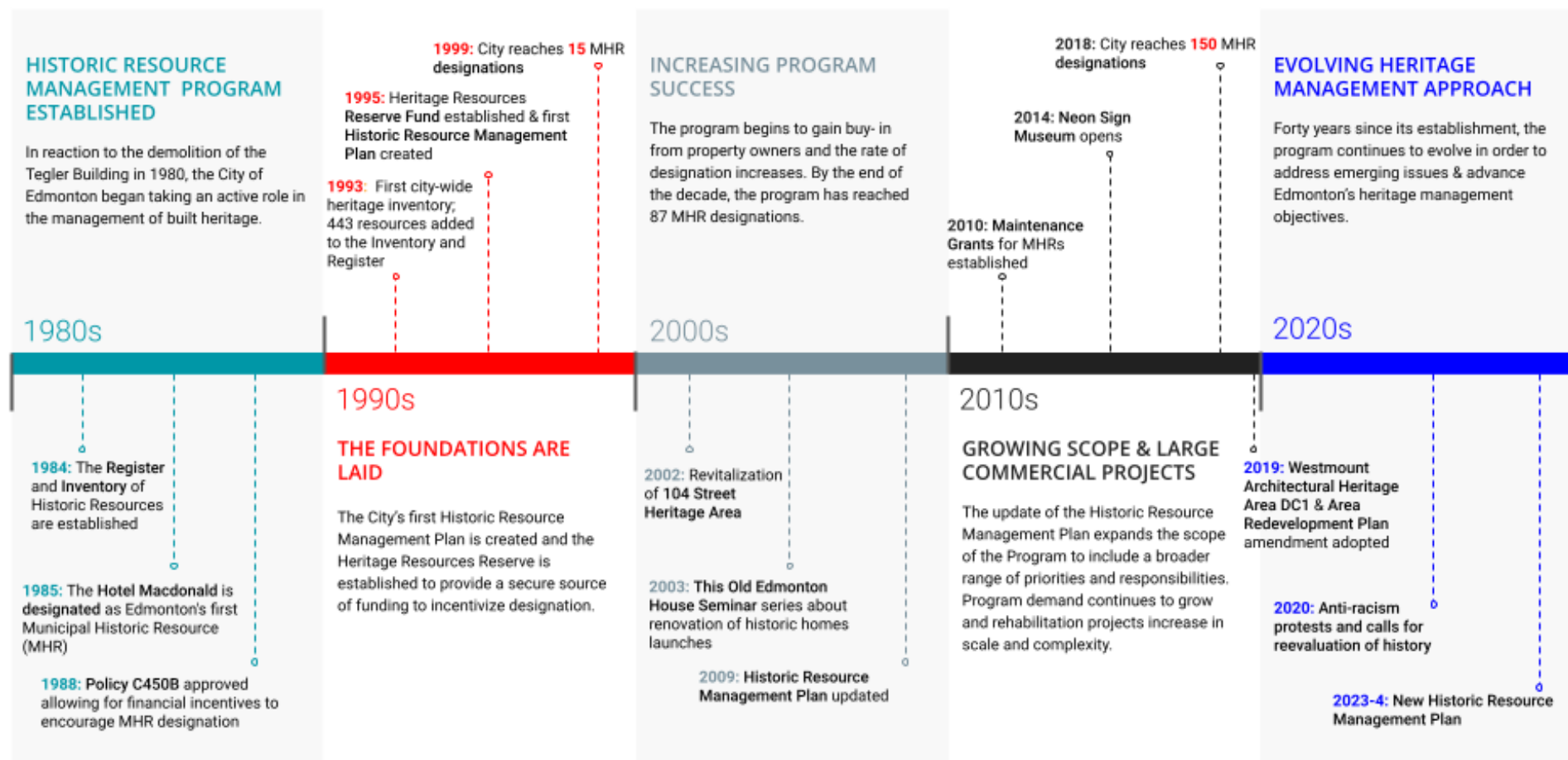
A GBA+ process applied to the creation of a new Historic Resource Management Plan will help to understand the inequalities and create opportunities for marginalized groups. Administration will include a robust GBA+ process in the planning, engagement, creation and delivery of the proposed new Historic Resource Management plan.

Regulatory tools designed to preserve important heritage elements must be sensitively employed so that neighbourhoods are inclusive and welcoming for all. Thus, the selection of heritage preservation tools must consider how they support and encourage inclusive neighbourhoods. Administration conducted a preliminary GBA+ analysis as part of the preparation of the Glenora DC1 zoning. The analysis focused on historic inequities connected to the neighbourhood's development resulting potentially in part from the Carruthers caveat.

ATTACHMENTS

1. Edmonton Heritage Planning Milestones
2. Potential Historic Resource Management Plan Content and Process

Edmonton Heritage Planning Milestones



Potential Historic Resource Management Plan Content and Process

The content of the Historic Resource Management Strategy will be informed by heritage management best practice, program need, and stakeholder and public engagement. The strategy is expected to contain content such as the following:

- Definition of “heritage” in Edmonton
- Statement of the goals and priorities of preservation in Edmonton
- Summary of past and present heritage work
- Discussion of tangible vs. intangible heritage
- Prioritization of heritage inventory work (e.g. Indigenous and other cultural historic resources, new area / neighbourhood inventories)
- Summary of legal and policy basis for heritage preservation
- Relationship between heritage preservation and The City Plan, Zoning Bylaw and other relevant policies and regulations
- Commitment regarding City-owned historic resources
- Discussion of tools to preserve historic resources (for more information, see the January 18, 2022, Urban Planning Committee report CR_7701):
 - Grants (primary existing tool)
 - Tax incentives (bylaw now under preparation)
 - Heritage trust / revolving fund
 - District plans
 - Incentive zoning / amenity bonusing for heritage preservation
 - Heritage area zoning

The process of preparing the Historic Resource Management Plan will consider the following:

- Heritage management best practices
- The City Plan direction to protect heritage while accommodating new development
- Community values regarding heritage (what is important to Edmontonians), as determined through city-wide engagement
- Edmonton’s heritage ecosystem (e.g. Edmonton Heritage Council, Edmonton Historical Board, Heritage Forward)
- How social justice / anti-discrimination movements including Indigenous reconciliation, Black Lives Matter, 2SLGBTQIA+, and the Me Too movement have changed the lens through which we view our past
- Role of heritage in meeting climate change / carbon reduction targets



CITY COUNCIL/COMMUNITY AND PUBLIC SERVICES COMMITTEE REPORT

Alcohol Consumption in River Valley Parks - Pilot Project Results

Recommendation of the Committee

That Administration provide a report outlining the implications, including best practices, of an expanded and/or permanent Alcohol at designated sites in Parks program, including fulsome engagement with public health experts, key stakeholders, and further GBA+ analysis.

History

- At the February 7/9, 2022, City council meeting, the January 31, 2022, Community Services report CS00633 was postponed to the February 22/24, 2022, City Council meeting.
- At the January 31, 2022, Community and Public Services Committee meeting, the January 31, 2022, Community Services report CS00633 was considered.
- The Committee heard from Z. Harvey-Jansen, M. Zakhary and B. Friesen, Alberta Health Services; A. Sood and J. Murji, Community Services Advisory Board; and J. Gonzalez-Abraldes, University of Alberta.

Attachment

January 31, 2022, Community Services report CS00633

Related motion made at the January 31, 2022, Community and Public Services Committee meeting

That Administration implement a permanent and expanded program beyond the pilot project, including opportunities outside River Valley, to allow alcohol consumption in parks at select designated picnic sites as permitted by the *Gaming, Liquor and Cannabis Act*. The expanded program is to be done within existing budgets.

Defeated (1-4-0)

Alcohol Consumption in River Valley Parks

Pilot Project Results

RECOMMENDATION

That the January 31, 2022, Community Services report CS00633, be received for information.

Report Purpose

Information only

Community and Public Services Committee is being provided the results of the pilot project that permitted consumption of alcohol at designated picnic sites in the river valley.

Previous Council/Committee Action

At the May 3, 2021, City Council meeting, the following motion was passed:

That Administration conduct a pilot project to allow public alcohol consumption in select river valley parks from May 28, 2021 to October 11, 2021, as outlined in the April 28, 2021, Citizen Services report CS00350, and provide a report back on the results by the end of 2021.

Executive Summary

- Administration conducted a pilot project permitting the consumption of alcohol at designated picnic sites within seven river valley parks.
- Data was collected during the pilot through an online feedback form, enforcement reports and on-site observations from park staff. In addition, following the pilot's completion, an online survey was made available for Edmontonians to provide feedback on the pilot.
- The data shows that the majority of individuals using the designated sites were compliant with the rules and regulations. The majority of violations, most often resulting in a warning, were related to consuming alcohol outside designated areas. There were minimal operational issues identified in the designated sites.

Alcohol Consumption in River Valley Parks - Pilot Project Results

- As the pilot project has concluded, alcohol consumption is no longer permitted in any City parks.

REPORT

The Alberta *Gaming, Liquor and Cannabis Act* permits the owner of a public park to designate picnic areas to allow alcohol consumption during the hours determined by the owner with appropriate signage that:

- states that a person may consume liquor in the designated picnic area
- sets out the boundaries of the designated picnic area
- sets out the hours when liquor may be consumed

In May 2021, City Council directed Administration to conduct a pilot project to allow public alcohol consumption in seven river valley parks from May 28 to October 11, 2021, between 11 a.m. and 9 p.m. Forty seven of the City's 193 picnic sites were selected for the pilot project (Attachment 1). These picnic sites included bookable and non-bookable sites. The sites were selected in alignment with five guiding principles established before the pilot began: safety, accessibility, visitor experience, honouring existing park uses and inclusivity.

Compliance

Between May 31, 2021, and August 31, 2021, peace officers conducted 396 proactive site inspections of designated and non-designated picnic sites specific to the pilot program. The approach for these proactive inspections focused on education and awareness of approved site locations, unless there were any serious or egregious infractions observed.

Within the parks selected for this pilot, officers reported 2,450 total violations.

- 245 warnings and zero tickets were issued in designated sites. The majority of the infractions were attributed to alcohol use outside the designated picnic site area or use after 9 p.m.
- 1,664 warnings and two tickets were issued in non-designated sites. All infractions were related to unlawful consumption or possession of open liquor.
- 541 non-liquor-related violations were also recorded in both designated and non-designated sites. These included public littering, off-leash pets, cannabis use and groups exceeding the gathering limits set under the *Public Health Act* for COVID-19.

Twenty-two per cent of park users who received a warning provided feedback about the lack of clarity on approved locations and believed that liquor was allowed either throughout the park or in all parks.

Education and Awareness

Education and awareness focused on communicating the rules, regulations, and expectations of alcohol consumption at designated picnic sites to park users through a variety of channels including public services announcements, news releases and interviews, social media, edmonton.ca and signage in the designated parks. The information provided reinforced the pilot

Alcohol Consumption in River Valley Parks - Pilot Project Results

timeframe and where and when alcohol consumption was permitted. Administration heard from some park users that the restrictions and regulations were unclear.

Usage and Site Impacts

River valley parks operational staff tracked usage and impacts at designated picnic sites during their daily servicing duties. Between May 28, 2021, and October 11, 2021, staff logged approximately 2,100 observations relating to occupancy, consumption, litter, noise, capacity, damage, hazards and user behaviour from the seven river valley parks that were part of the pilot.

Overall, staff noted there was high usage of the designated picnic sites and minimal negative impacts. During the first month of the pilot, most issues were related to users' misunderstanding of where consumption was allowed (e.g. not allowed throughout the entire park) or the sites exceeded COVID-19 outdoor gathering restrictions that were in effect at that time. These gathering restrictions were removed on July 1, 2021. For the remainder of the pilot, staff indicated impacts/issues were negligible with just a few reports of excessive litter.

Pilot Project Costs

The costs for the pilot project were absorbed within existing operating budgets in order to assess the resource impacts and financial implications of the pilot.

Production and installation of required signage and posts totalled \$4,000. Additional temporary mobile signage was added at park entrances totalling \$10,000.

Peace officers provided proactive patrols and user engagement by reassigning general duty shifts from other areas or occasionally through overtime coverage. Approximately 100 service hours were covered through overtime, resulting in an additional expenditure of approximately \$8,266. The remaining costs were absorbed by existing budgets.

Next Steps/Considerations

As the pilot project has concluded, alcohol consumption is no longer permitted in any City parks. Park users have opportunities to consume alcohol in parks at licensed restaurants or festivals only. Tobacco and cannabis smoking is only permitted at select sites in parks, while edible cannabis is allowed in all public spaces.

A permanent program to allow alcohol consumption in parks could be established if directed by City Council. A permanent program could consider the number of areas where alcohol consumption would be allowed.

The level of patrols and monitoring provided by the peace officers during the pilot project is not sustainable in the long term without significant impacts to other services. Ongoing proactive patrols and monitoring services at a similar level and number of geographic locations as provided in the pilot program would require an additional two full-time peace officer positions and equipment at a cost of approximately \$350,000 annually. These peace officers would be able to deliver additional services and, during winter months, could supplement existing personnel in the delivery of traditionally under-resourced services. If

Alcohol Consumption in River Valley Parks - Pilot Project Results

opportunities were to expand to include additional geographic locations then costs for a similar level of enforcement service would increase proportionally.

Additional funding for on site signage installation and maintenance and communications materials would be required and would be similar to costs incurred during the pilot, up to approximately \$20,000 annually.

COMMUNITY INSIGHT

During the pilot program, an online form was available to capture feedback about the pilot program (Attachment 2). The feedback form was made available through a QR code posted on the signage at designated parks and on edmonton.ca between May 28, 2021, and October 11, 2021. In total, 310 responses were received and indicated that:

- Among those who used a designated site, the overall experience was largely positive. Those who had a negative experience with the picnic site shared concerns of not being able to find a spot, concerns about disorderly behaviour, damage to the park, and safety. Overall, they suggested that alcohol should be allowed in the whole park.
- Among those who did not use a designated picnic site, many indicated the program negatively impacted the use of the park including concerns for the safety of families and an insufficient number of designated sites.

311 received 73 calls about the pilot project. The majority of calls (65) were for general information and the remainder (8) were with feedback, either positive or negative.

Upon completion of the pilot project, Administration conducted a survey to capture Edmontonians' feedback about the pilot program (Attachment 3). Administration conducted a survey, available on edmonton.ca and to the Edmonton Insight Community, from November 1 to 14, 2021. In total, 3,868 responses were received. The results indicate:

- 53 per cent of respondents who experienced the pilot rated their experience as very or somewhat positive, 22 per cent rated their experience as neutral, 12 per cent provided a negative rating and 12 per cent did not provide an opinion on their experience.
- 54 per cent of respondents indicated the pilot did not impact their park visitation and 30 per cent indicated it made them more likely to visit.
- Among respondents who were aware of the pilot, 50 per cent would like to see the program expanded while 19 per cent would like to see alcohol consumption banned at all parks.

Administration shared the high level results of the pilot project with the Community Services Advisory Board and has had a follow up conversation with Alberta Health Services. Both groups have identified concerns related to the trends/data and potential impacts of alcohol consumption on the community. Some of the key concerns include:

- Problematic use of all substances has increased throughout the COVID-19 pandemic, including alcohol.
- Visible use of alcohol in public reduces stigma and increases normalization of use through

Alcohol Consumption in River Valley Parks - Pilot Project Results

increased exposure.

- Increased exposure to children, youth, marginalized groups, and people who are dealing with addictions and recovery.
- There are safety considerations with intoxication in a park, including isolated spaces, high and low use trails, proximity to the river, and steep embankments.
- There is a lack of data related to individuals using the parks.

GBA+

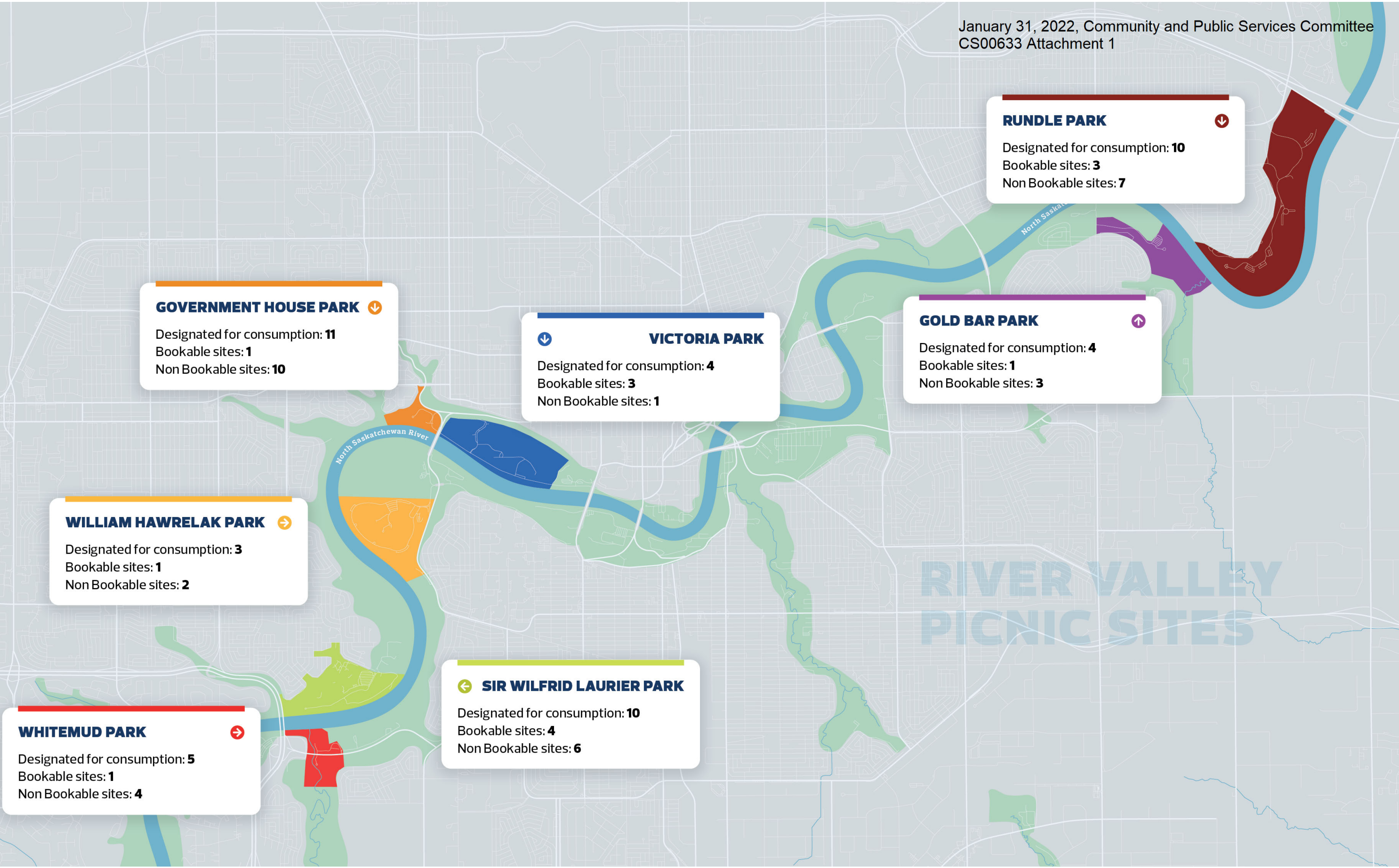
Five guiding principles were established to support park and picnic site selection for the pilot project. One of these principles was inclusivity, which was defined as spaces enabling all users to participate equally, confidently and independently. Considerations arising from this guiding principle included geographical distribution of selected sites, impacts to vulnerable populations, respecting those who do and do not consume alcohol, costs associated with accessing the opportunity, and maintaining a range of activities and spaces for a variety of park users.

While this guiding principle assisted in the pilot design, a full GBA+ analysis was not completed at the outset due to the timelines given to begin the pilot project. If the program is to become permanent, the project team has identified the following themes that could be explored in greater depth to help assist with setting direction for the permanent program:

- develop a deeper understanding of the perceptions and impacts by various cultural, ethnic and religious groups
- understand how the program could impact individuals who are experiencing substance abuse disorders
- understand how safety can be further addressed by those community members who feel their safety may be compromised
- develop further understanding to include various community groups who recognize the program as a benefit to the parks

ATTACHMENTS

1. Pilot Project Locations
2. Summer Pilot Feedback Results
3. Public Consumption Post-Pilot Research Survey Report





Public Consumption Monitoring

Summary Report

Prepared by Corporate Research Unit
research@edmonton.ca

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Background & Methodology

The City of Edmonton ran a pilot to allow alcohol consumption at designated picnic sites. The pilot ran from May 28 to October 11, 2021. City conducted a survey to capture Edmontonians' feedback about the pilot program. The results of this survey along with the enforcement, financial and operational data will be used to evaluate the pilot program.

The survey was made available through a QR code posted on the signage at designated parks. It was also available on edmonton.ca/surveys between May 28, 2021 and October 11, 2021.

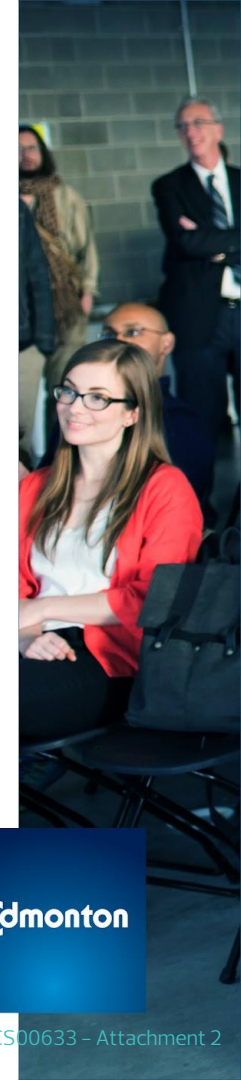
In total, **310** responses were received. Respondents provided feedback on the following parks:

1. Gold Bar Park (31 respondents)
2. Government House Park (44 respondents)
3. Rundle Park (40 respondents)
4. Sir Wilfrid Laurier Park (33 respondents)
5. Victoria Park (38 respondents)
6. Whitemud Park (26 respondents)
7. William Hawrelak Park (76 respondents)
8. General feedback about the program (195 respondents)

Find out more by going to: edmonton.ca/engagement

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Executive Summary

Overall Experience

- Among those who utilized a designated picnic site,
 - The overall experience was largely positive
 - The positive experience was dedicated to a variety of reasons including completion of an enjoyable food experience, increased enjoyment of picnic spaces, increased opportunities for social interactions and support of a healthier drinking culture
 - Those who had a negative experience with the picnic site shared concerns of not being able to find a spot, concerns about disorderly behaviour, damage to the park and safety and suggested that alcohol should be allowed in the whole park
- Among those who did not utilize a designated picnic site,
 - Many indicate the program had a negative impact in using the park
 - The reasons for negative impact include concerns for safety of family and not enough designated sites.

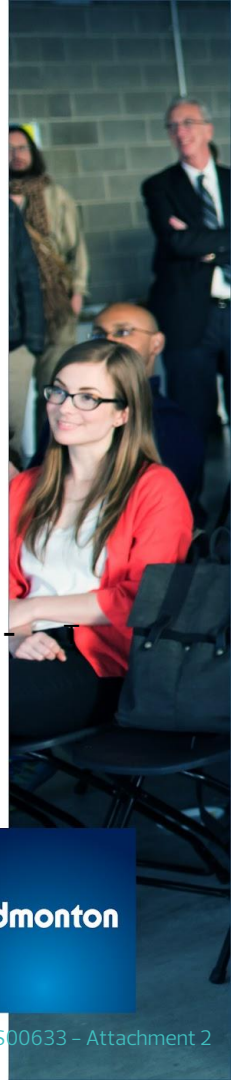
Signage

- When asked if the sites were easier or difficult to locate, the opinion is divided.
- Those who indicated difficulty in located the designated site mentioned the following changes: more signage, clearer instructions and allowing consumption in the whole park to avoid confusion.

Find out more by going to: edmonton.ca/engagement

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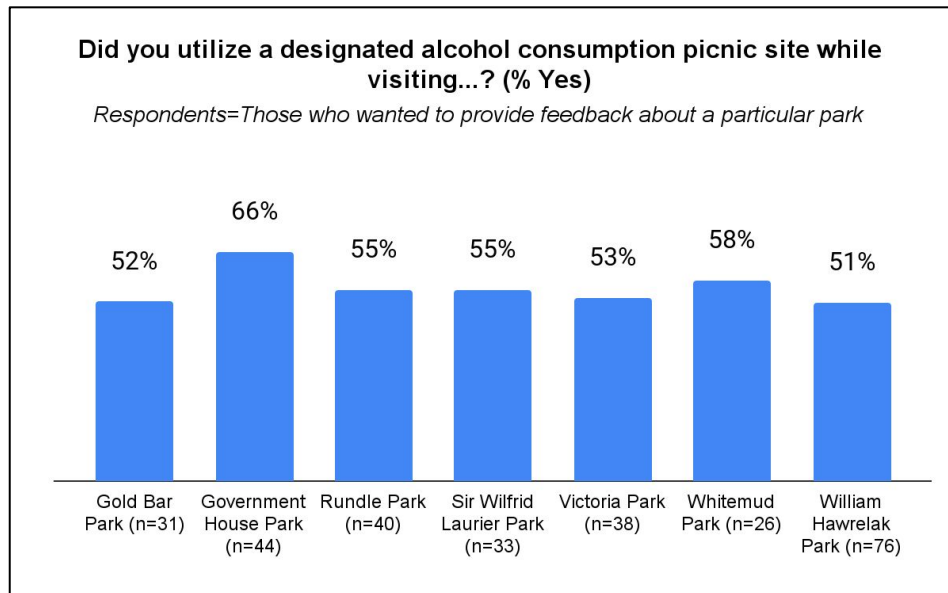


Detailed Results

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More than half of the respondents utilized a designated site



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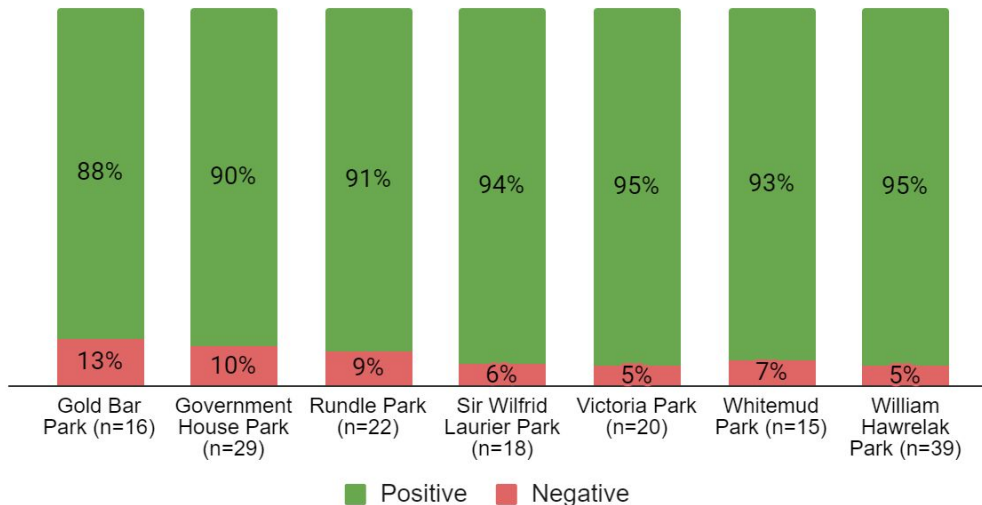
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Overall experience of the designated was largely positive

Overall, did you have a positive or negative experience?

Respondents=Those who utilized alcohol consumption picnic site



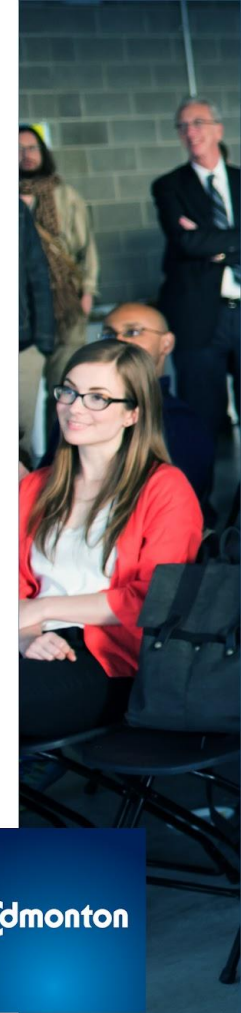
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Q3. We would like to know about your visit to the designated alcohol consumption picnic site. Overall, did you have a positive or negative experience?

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The positive experience was dedicated to a variety of reasons

<i>Among those who had a positive experience while utilizing the designated site</i>	Gold Bar Park (n=14)	Government House Park (n=26)	Rundle Park (n=20)	Sir Wilfrid Laurier Park (n=17)	Victoria Park (n=19)	Whitemud Park (n=14)	William Hawrelak Park (n=37)
Completed an enjoyable food experience (food and drink)	86%	88%	85%	82%	89%	79%	78%
Regulated an activity that was already happening	36%	50%	40%	71%	68%	50%	49%
Increased opportunities for social interaction with friends and family	71%	81%	80%	76%	68%	86%	81%
Increased enjoyment of picnic spaces	86%	88%	95%	94%	89%	86%	95%
Supported a healthier, more moderate drinking culture	79%	69%	85%	82%	79%	79%	65%
Increased use of picnic spaces	64%	62%	65%	65%	63%	64%	73%
Increased inclusivity	50%	54%	60%	59%	32%	50%	46%
Other	0%	0%	5%	0%	0%	14%	5%

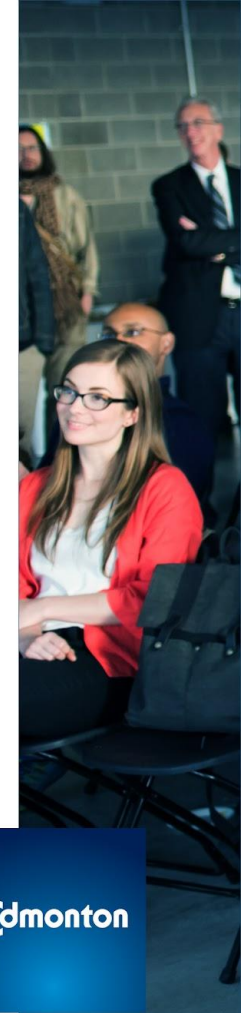
Find out more by going to: edmonton.ca/engagement

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Q4. Tell us what made your experience positive.

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Respondents had concerns about finding a spot

Negative comments include:

1. Difficulty finding a spot
2. Should be allowed to drink in the whole park
3. Concerns about increase in disorderly behaviour, damage to the park and safety in general

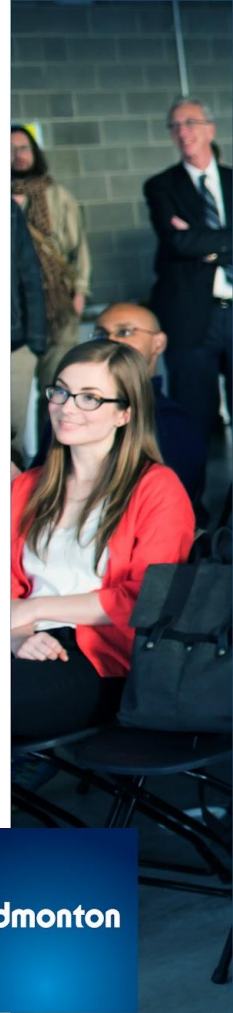
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Note: Due to low sample sizes (less than 5 respondents per park), percentages are not shown.
Q5. Tell us what made your experience negative.

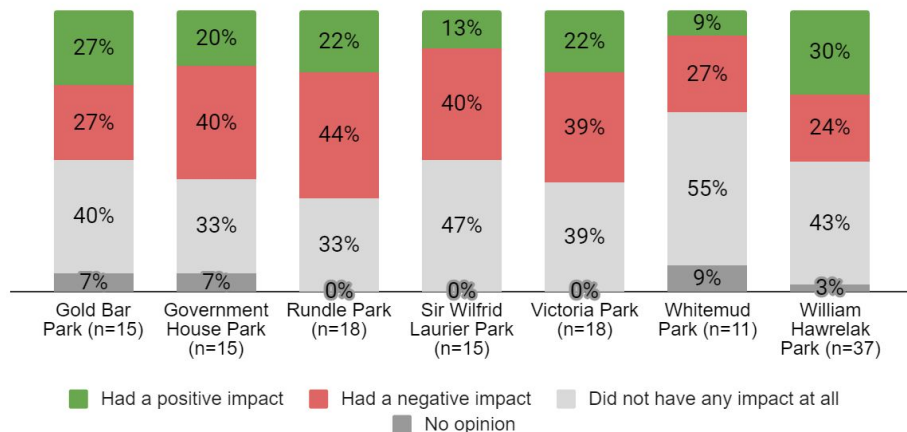
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Among those who did not utilize a designated site, many indicate the program had a negative impact in using the park

Did the introduction of designated alcohol consumption picnic sites impact your experience in ... Park in any way?

Respondents=Those who did not utilize alcohol consumption picnic site



The reasons for negative impact include

- Concerns for safety of family
- Not enough designated sites.

Find out more by going to: edmonton.ca/engagement

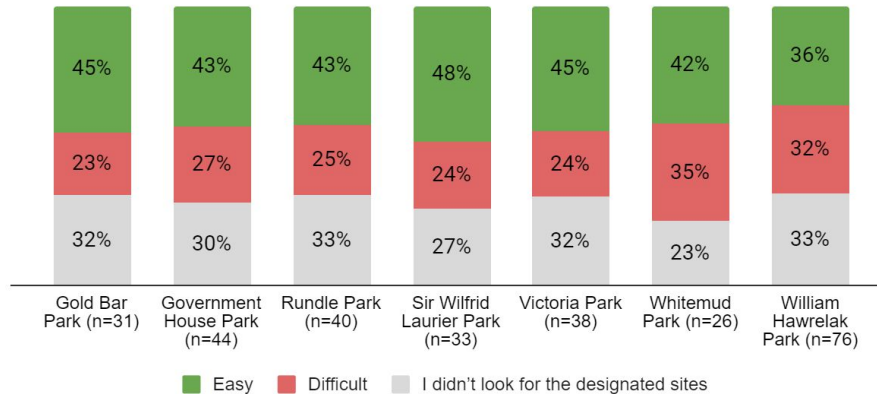
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The opinion is divided on whether the sites were easy or difficult to locate

Was it easy or difficult to locate the designated picnic sites when you were in...?

Respondents=Those who wanted to provide feedback about a particular park



Those who found it difficult to locate the site were asked what would make it easier to locate the sites. Their comments include:

- Better/clearer signage
- Include site numbers on the online map
- Allow consumption in the whole park

Find out more by going to: edmonton.ca/engagement

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Comments about the program in general

Not in favour of the program

- Makes park unsafe for family and children
- Possibility of crime, impaired driving
- Increase in litter; not enough trash cans
- People not following rules

"Parks are supposed to be geared to families and children - and be a nice, quiet place to for anyone to spend some time. This gives permission for it to be more of an adult place with a higher possibility of crime and violence. In other words, a place to be avoided. I don't think this was a good direction to go."

In favour of the program

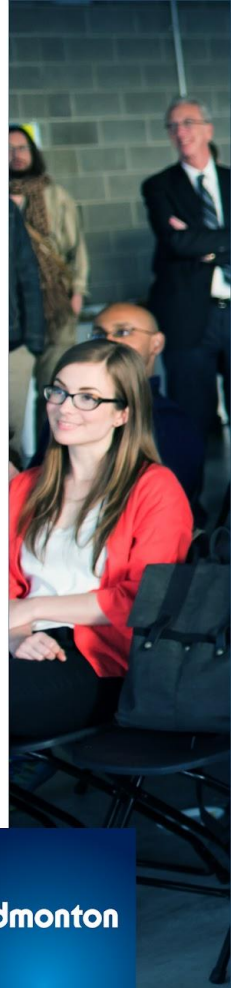
- Allow alcohol in the whole park
- Increase number of designated sites
- Had a nice experience during pilot
- Need more education/signage of rules

"It could be expanded so that people could lay down a blanket and have a drink in that kind of picnic setting as well. The park environment was very pleasant. There were lots of families and some people other than us who were drinking, but no one was rowdy or making a scene. It made for a lovely summer evening activity."

Find out more by going to: edmonton.ca/engagement

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Questions?

E-mail research@edmonton.ca for more information, or visit www.edmonton.ca/surveys

Interested in the Edmonton Insight Community?

Go to www.edmontoninsightcommunity.ca to join or learn more.

Looking for Data?

Visit data.edmonton.ca to find this and other City of Edmonton data on the Open Data Portal.

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Public Consumption Post Pilot Research

Survey Report

November 2021

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Background & Methodology

The City of Edmonton conducted a pilot to allow alcohol consumption in designated picnic sites in seven River Valley Parks. A total of 47 picnic sites, including both bookable and non-bookable options were selected for the pilot that ran from May 28 to October 11, 2021. An online post-pilot survey was conducted to capture Edmontonians' feedback about the pilot program. The results of this survey along with the enforcement, financial and operational data will be used to evaluate the pilot program.

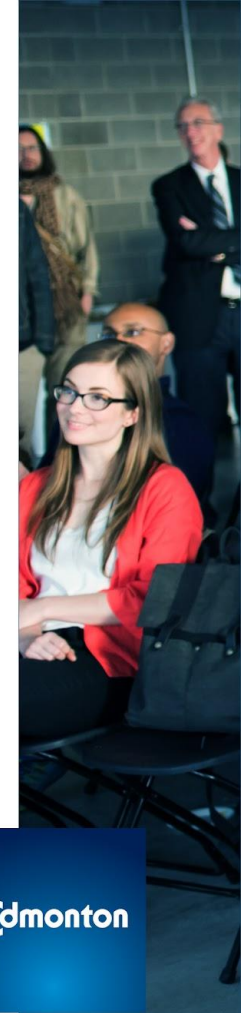
The survey was made available on edmonton.ca/surveys and an invite was sent to Edmonton Insight Community members between November 1, 2021 and November 14, 2021.

In total, **3,868** responses were received to the study.

Find out more by going to: edmonton.ca/engagement

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Executive Summary

Pilot Evaluation:

Overall

- Majority (53%) of respondents who have experienced the pilot rate their experience very or somewhat positive, 22% rate their experience as neutral, 12% provide a negative rating and 12% did not provide an opinion on their experience.
- Among respondents who are aware of the pilot, 50% would like to see the program expanded, followed by 19% who would like to see all alcohol consumption banned at parks.
- Majority (54%) of respondents indicate the pilot did not impact their park visitation, followed by 30% who indicate it made them more likely to visit.

Disorderly behaviour

Majority of respondents who have experienced the pilot agree that they did not encounter disorderly behaviour (79%), noise (76%) or litter issues (70%).

Enforcement

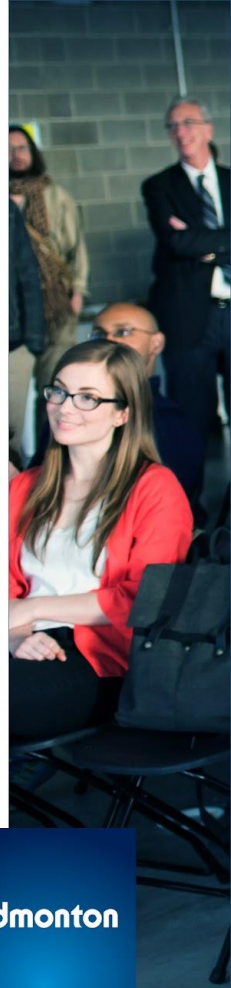
When asked about sufficient enforcement present, 35% of respondents had a neutral opinion and 27% indicated it did not apply. 23% of respondents agreed that there was sufficient enforcement present to avoid disorderly behaviour.

Locations and Hours

53% of respondents agree that the hours worked for them. Though 46% agree that the sites were conveniently located, opinion is divided on whether there were enough sites (29% agree, 29% disagree).

Signage

Agreement is also high that the signage clearly listed the rules (60%) and sites (59%), and made it easy to find the sites (51%).



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Detailed Results

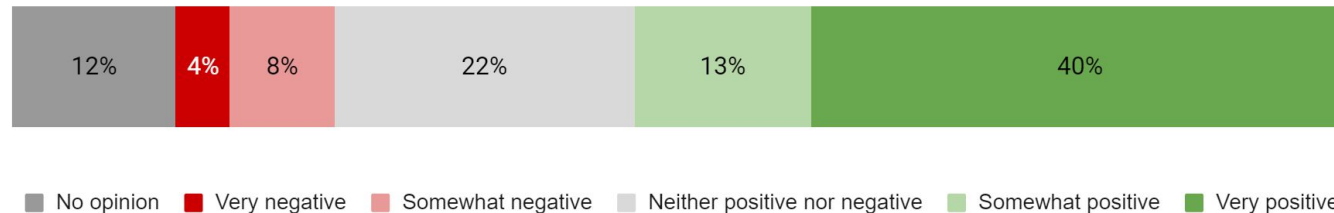
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Overall Experience with the Pilot

How would you rate your experience with the pilot program that allowed alcohol consumption at designated picnic sites in Edmonton?

Respondents who are aware of the pilot and have experienced it by utilizing a site or visiting a designated park=2,526



Majority (53%) of respondents who have experienced the pilot rate their experience very or somewhat positive. Respondents who identify as 18-34 years of age or LGBTQ2S+ are more likely to rate their experience as positive.

Find out more by going to: edmonton.ca/engagement

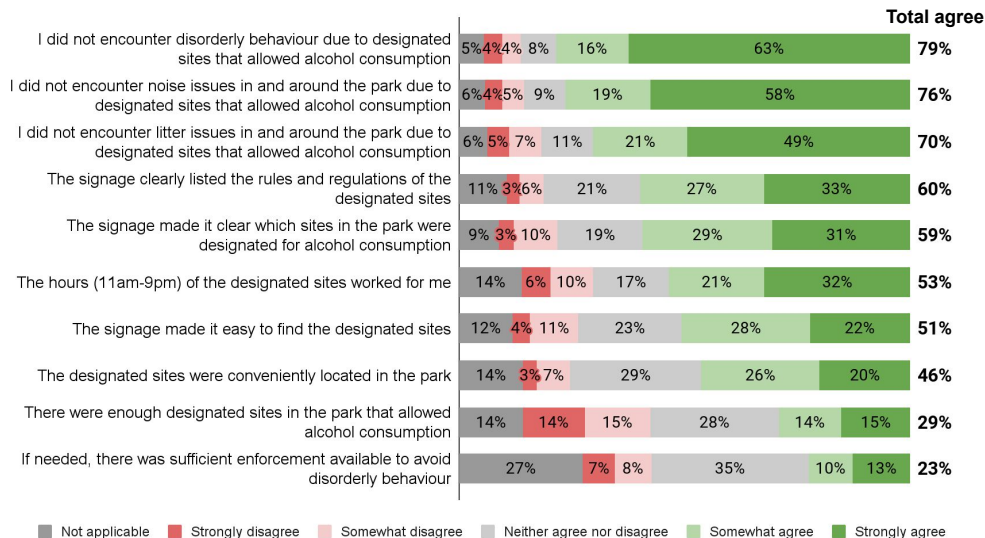
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Experience with Pilot Features

Please rate your experience with the following features of the pilot program that allowed alcohol consumption at designated picnic sites in Edmonton.

Respondents who are aware of the pilot and have experienced it by utilizing a site or visiting a designated park=2,526



Find out more by going to: edmonton.ca/engagement

Majority of respondents who have experienced the pilot agree that they did not encounter disorderly behaviour (79%), noise (76%) or litter issues (70%).

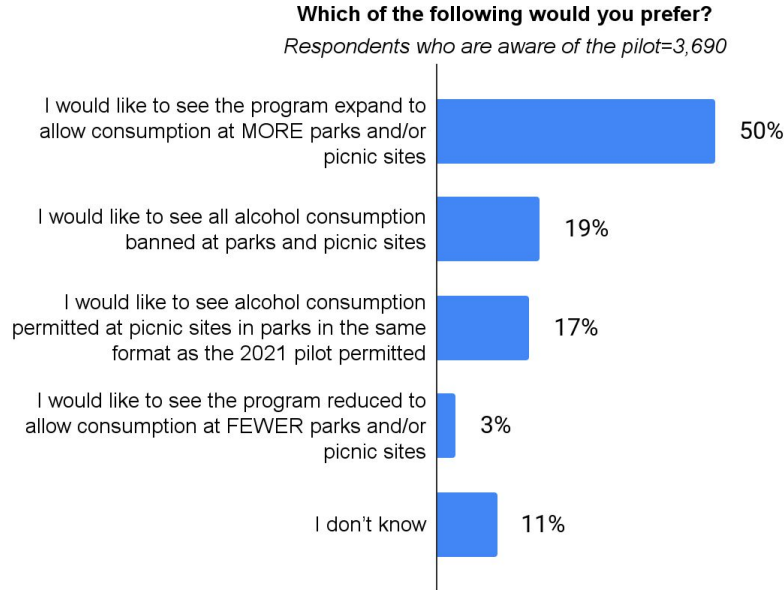
Agreement is also high that the signage clearly listed the rules (60%) and sites (59%), and made it easy to find the sites (51%).

53% of respondents agree that the hours worked for them. Though 46% agree that the sites were conveniently located, opinion is divided on whether there were enough sites (29% agree, 29% disagree).

When asked about sufficient enforcement present, 35% of respondents had a neutral opinion and 27% indicate it did not apply.

Edmonton

Preference for the Program



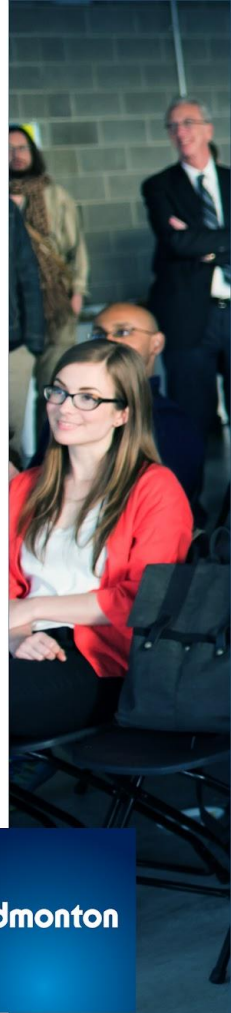
50% of the respondents who are aware of the program would like to see the program expand to more park/sites, followed by 19% who would like all alcohol consumption banned at parks.

Expansion of the program is more likely to be supported by respondents who self-report to identify as 18-34 years of age, male, transgender, non-binary, two-spirit, LGBTQ2S+.

Find out more by going to: edmonton.ca/engagement

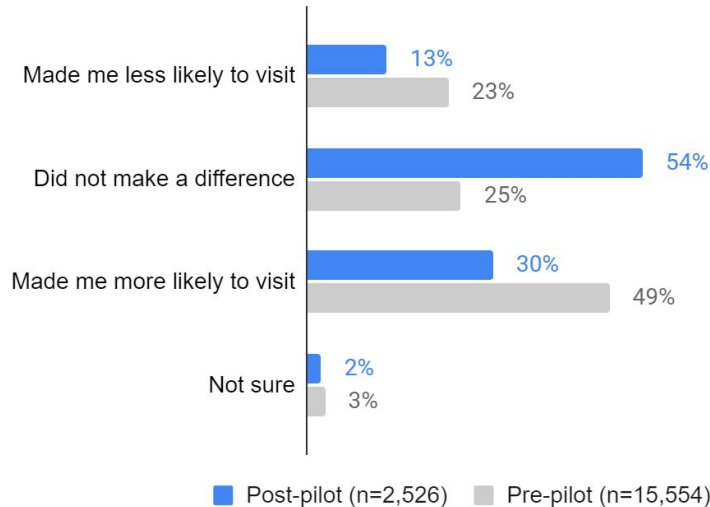
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Impact of Pilot on Park Visitation

Did the pilot program impact your likelihood of visiting a park in Edmonton?



Compared to the pre-pilot, respondents are more likely to indicate that the pilot program did not impact their likelihood to visit a park in Edmonton.

Find out more by going to: edmonton.ca/engagement

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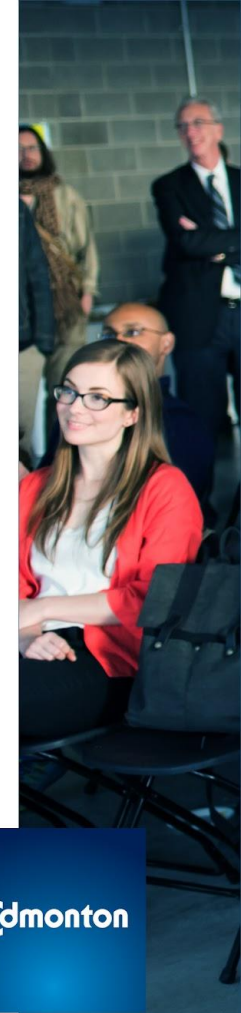
Demographics

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Gender	n=3,868
Female	50%
Male	43%
Non-binary	1%
Transgender	0%
Two-Spirit	0%
Another gender not listed above	0%
I prefer not to answer	5%
Identify as...	n=3,868
Visible minority	7%
Persons with disabilities	6%
Indigenous	2%
New to Canada (less than 5 years)	1%
LGBTQ2S+	7%
Other	5%
I prefer not to answer	8%
None of the above	68%

Age	n=3,868
18-24 years old	1%
25-34 years old	14%
35-44 years old	20%
45-54 years old	16%
55-64 years old	22%
65 to 74 years old	18%
75+ years old	6%
I prefer not to answer	2%
Children in household	n=3,868
Yes	22%
No	75%
I prefer not to answer	3%
Residence	n=3,868
Live in Edmonton	99%
Live in surrounding areas	1%
Prefer not to answer	0%



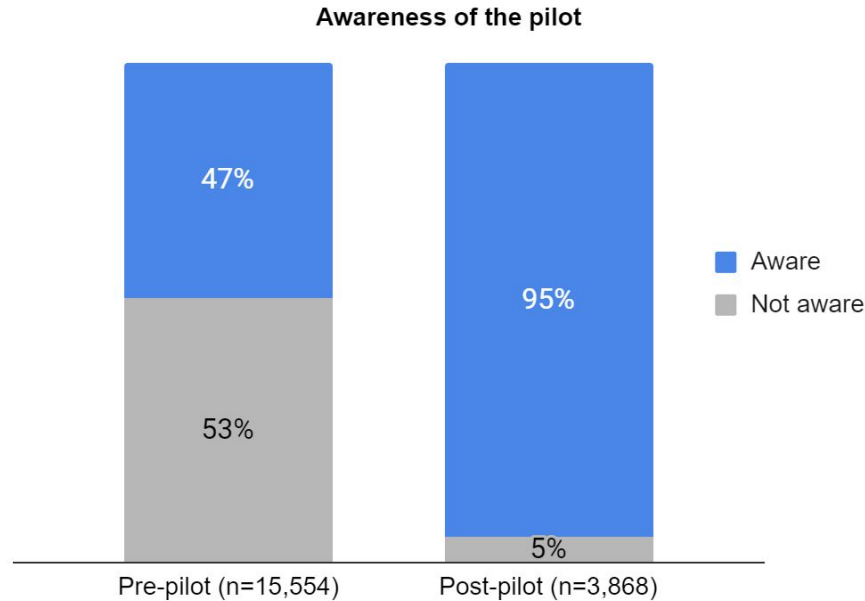


Appendix

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Awareness of the Pilot



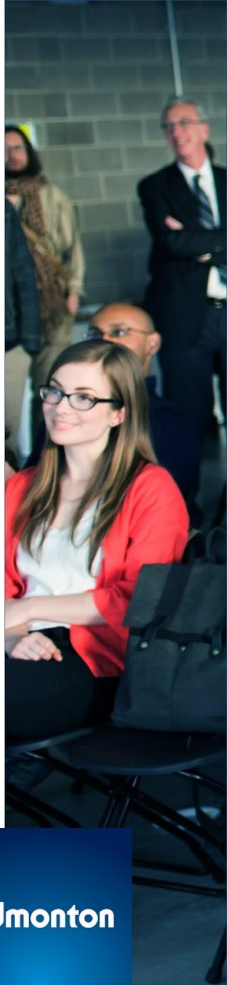
Find out more by going to: edmonton.ca/engagement

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Q1. Before today, were you aware of the pilot program to allow alcohol consumption at designated picnic sites that ran from May 28 to October 11, 2021?

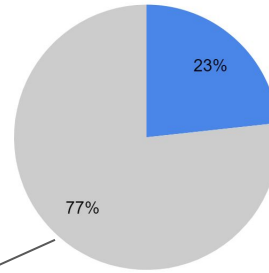
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Utilization of Designated Parks and Sites

Did you utilize a designated picnic site allowing consumption during the pilot period?

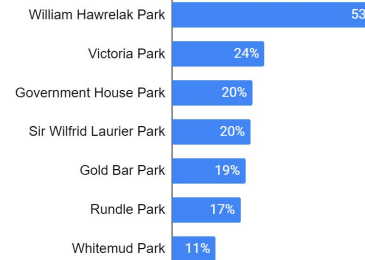
Respondents who are aware of the pilot=3,690



● Yes ● No

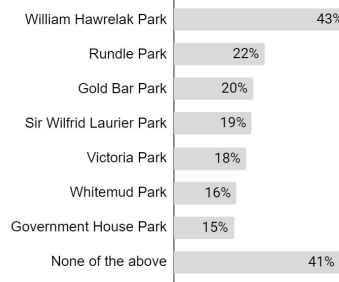
Where did you utilize the designated picnic site?

Respondents who utilized a designated site=859



Did you visit any of the following parks during the pilot period from May 28 to October 11, 2021?

Respondents who did not utilize a designated site=2,831



Find out more by going to: edmonton.ca/engagement

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Q2. Did you utilize a designated picnic site allowing consumption during the pilot period? Q3a. Did you visit any of the following parks during the pilot period from May 28 to October 11, 2021?

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Questions?

E-mail research@edmonton.ca for more information, or visit www.edmonton.ca/surveys

Interested in the Edmonton Insight Community?

Go to www.edmontoninsightcommunity.ca to join or learn more.

Looking for Data?

Visit data.edmonton.ca to find this and other City of Edmonton data on the Open Data Portal.

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Transit Safety and Security

RECOMMENDATION

1. That the Transit Safety Plan, as outlined in the February 22/24, 2022, Office of the City Manager report OCM01037, be approved.
2. That the Community Standards and Neighbourhoods Branch 2022 operating expenditure budget be increased by \$3.9 million, on a one-time basis, to fund the Transit Safety Plan, with funding as follows:
 - \$1.1 million - from COVID-19 funds with the appropriated Financial Stabilization Reserve;
 - \$1.7 million - from Edmonton Police Services funds held corporately within Financial Strategies and;
 - \$1.1 million - from the Financial Stabilization Reserve.

Report Purpose

Council decision required

Council is being asked to approve the Transit Safety and Security Plan, enhanced safety measures and protocols, as outlined in this report and corresponding budget.

Executive Summary

- Transit systems are intended to be busy and vibrant, transporting large volumes of riders between their homes, work, schools, events and other activities.
- With a decrease in ridership due to COVID-19, the sense of safety and community in the transit system has temporarily changed.
- With an increase in mental health challenges, the drug poisoning epidemic and displacement from other spaces, the transit system is perceived by marginalized Edmontonians as a safe place to congregate and shelter. However, when social disorder arises from congregating and sheltering in LRT facilities, transit riders and others using the downtown pedway system may experience feelings of unease.

Transit Safety and Security

- As the City of Edmonton continues to welcome back riders to the transit system, Edmonton's marginalized population must be provided with consistent, coordinated and culturally-appropriate social and safety supports as part of the transition.
- The City of Edmonton, the Edmonton Police Service and Bent Arrow Traditional Healing Society will establish a tripartite leadership committee. The tripartite leadership committee will focus on coordinated strategies and responses as well as immediate support for Edmontonians using the transit system for shelter. As these strategies, responses and support mechanisms are operationalized, enforcement may occur when social disorder, problematic and illegal behaviour arises from congregating and sheltering in Edmonton Transit Service (ETS) facilities.
- Administration, the Edmonton Police Service and Bent Arrow Traditional Healing Society will implement a joint safety operations team under a unified (shared) command system that includes Transit Peace Officers, Police Officers, Community Standards Peace Officers, outreach workers and Fire Rescue Services.
- To enable the joint safety operations team, protocols related to governance, deployment, standard operating procedures and facilities will be initiated. As the work proceeds, ongoing assessments of additional safety enhancements will be evaluated for implementation.
- If Council approves the Transit Safety Plan outlined in the body of the report, the City of Edmonton will enter into a three year Memorandum of Understanding with the Edmonton Police Service, Bent Arrow Traditional Healing Society and other stakeholders as needed.

REPORT

The effects of the ongoing global COVID-19 pandemic are far reaching and are felt in many major municipalities. Public spaces, in particular in downtown areas, have seen shifts in their use - both in volume and activity. COVID-19 and related public health orders, including stay at home measures, have led to a decline in public transit demand for transit agencies across North America. With the significant decrease in ridership resulting in a decline in typical daily activity that allows for inherent natural surveillance, transit centres have transformed into impromptu gathering spaces for those experiencing multiple challenges. Increases in homelessness and drug use, complicated by mental health challenges have created conditions that sometimes see social disorder and crime playing out in these locations. As a result, transit riders and those using the LRT system may feel uneasy and, at times unsafe, in taking public transit.

Administration is committed to ensuring that the transit system is a safe, reliable and convenient mode of transportation, supporting equity, economic, health, social and climate-related outcomes. As public health orders are lifted, Administration and the Edmonton Police Service are recommending an approach that considers the needs of increased ridership and provides care to individuals who are currently using transit and transit facilities for unintended purposes.

The Transit Safety Plan outlined within this report will build upon the previous work laid out in City Operations report CO00526 -Transit Centre Security Measures presented to the Urban Planning Committee on May 11, 2021, and foundational investments made in 2018. These investments included:

Transit Safety and Security

- \$12.8 million to install bus shields on the conventional bus fleet for Operator safety;
- \$10.2 million to increase the number of Transit Peace Officers and ETS Control Centre staff to align with growth in the transit system and provide 24/7 coverage, as well as add Security Guards at 21 of the 43 transit facilities and LRT stations; and,
- \$877,000 invested in building a continuous training program for Transit Operators.

Attachment 1 provides additional information on the Transit Safety and Security Model and the inputs, outputs, key measures and outcomes to achieve the City's goal of providing riders with a safe public transit experience.

Background

Since 2016, the City of Edmonton has been a member city of the United Nations Women's Safe Cities and Safe Public Spaces Global Initiative and in February 2020, the local Community Collaboration Committee released a report with recommended prevention and intervention strategies (Attachment 2) focused on:

- Inclusion of Indigenous Perspectives in Developing Interventions
- Policy Amendment
- Education and Awareness
- Ensure Safety of Public Infrastructure
- Training for First Responder/Justice Roles
- Reporting Sexual Violence
- Relationship Building

City Policy C620, approved by Council in 2019, Supporting Vulnerable People During Extreme Weather Conditions, formalized the City of Edmonton's role in leading a systematic response to extreme weather conditions to safeguard the health and lives of Edmontonians who are marginalized.

LRT stations were acknowledged to not be a suitable shelter space as they lacked basic amenities such as washrooms, were often inadequately heated to alleviate extreme cold, and did not allow those using the space to safely connect with important social supports. With dedicated extreme weather protocols, the City collaborates with Homeward Trust and more than 25 partner agencies to keep marginalized Edmontonians safe and warm; this includes transportation support (including a 2022 pilot of an ETS "warming bus") throughout the winter months to connect marginalized Edmontonians to shelter services.

To identify further next steps focused specifically on the issue of safety in the transit system, Administration will reconvene the Community Collaboration Committee and engage with key stakeholders and City advisory boards. Administration is also in the final stages of completing a Gender Based Analysis (GBA+) review of transit safety and security. The analysis, with input from diverse community stakeholders, will be presented to Council in Q3 2022.

Social Supports

In October 2021, the City, in partnership with Bent Arrow Traditional Healing Society, began piloting the Community Outreach Transit Team (COTT). COTT helps Edmontonians who require

Transit Safety and Security

specialized support on transit and is based on a similar program used in the City of Calgary. Guided by the values of dignity and respect, COTT assists individuals and helps them access support and services, such as housing, mental health care, substance use resources, and financial assistance. The team is currently made up of two Transit Peace Officers and two Bent Arrow Traditional Healing Society outreach workers, who work in partnership to provide support from 8:00 a.m to 10:00 p.m.

If the Transit Safety Plan is approved by Council, Administration would provide additional resources such as an outreach coordinator and to increase COTT to a total of three peace officers and three outreach workers. Administration will continue to review the COTT implementation to assess opportunities for further evolution. Based on the needs identified in the first four months of COTT operations, scaling up the model to fully address coordinated interventions will be explored for sustainability and impact.

COTT team training will include education on systemic issues through a trauma-informed, intersectional and anti-racist approach. For individuals requiring services beyond the scope of the COTT support such as health care, addictions treatment, psychiatric services and other specialized care, Administration will work with Alberta Health Services to explore how these services can be accessed.

To maximize the potential of transit facilities and create a sense of community and vibrancy, Administration will also continue work on developing plans for space activation in transit centres and LRT stations.

Transit Safety Plan - Enhanced Safety Measures and Protocols

To coordinate and deliver safety and social support for those who are experiencing homelessness, a tripartite leadership committee composed of City Administration, Edmonton Police Service and the Bent Arrow Traditional Healing Society will be initiated. Together, the tripartite leadership committee will develop and implement immediate additional enhancements to safety for all Edmontonians in the transit system.

The tripartite leadership committee will focus on:

1. Coordinating crime prevention strategies and targeted responses to criminal activity; and
2. Ensuring that people experiencing homelessness who use the LRT system for shelter are provided with the supports they need now, as the City and its partners work towards addiction, intervention and housing solutions.
3. The approach for transit safety and security includes Police officer, Transit Peace Officer and Security Guard roles.

As the Transit Safety Plan is operationalized, the foot patrol teams of Transit Peace Officers will have assignments to specific transit centres and LRT stations. Police Officer and Transit Peace Officer resources, working in collaboration with Bent Arrow Traditional Healing Society, will be deployed in a unified and consistent manner based on collective data analysis with both the City of Edmonton and the Edmonton Police Service as contributors. Building on past short-term shared deployments, joint planning will be used to ensure effective and efficient crime prevention and crime responses are aligned between the teams. The planning will consider the use of joint

Transit Safety and Security

deployment, a continuum of enforcement resources and evolving public safety techniques. The joint deployment planning will also account for the historical context of enforcement of marginalized populations and the need to build trustful relationships.

To enable joint safety operations, the following protocols will be initiated:

Protocol	Details
Governance	<ul style="list-style-type: none"> A tripartite leadership committee will be initiated, composed of the Edmonton Police Service, the City of Edmonton and the Bent Arrow Traditional Healing Society. A new unified command team will report directly to the tripartite leadership committee to ensure enforcement and social support are properly integrated. A joint analytics and evaluation working group will be created to develop collective outcomes, goals and evaluation measures.
Joint deployment	<ul style="list-style-type: none"> Organized under a unified command structure, teams will be comprised of Bent Arrow Traditional Healing Society outreach workers, Police Officers, Transit Peace Officers, Community Standards Peace Officers and Fire Rescue Services. Consideration will also be given to Security Guards who are stationed in LRT stations. Teams will share communications channels (providing enhanced awareness), critical incident debriefs and additional tools to assist with opioid overdoses. To ensure consistent data use for decision making and deployment processes, the City of Edmonton and the Edmonton Police Service will share data, including calls for service, crime and disorder incidents, and other relevant information, including access to ETS CCTV systems. Further to the June 30, 2021 Community and Public Services Committee report CS00477, a joint dispatch model will be explored to support this model.
Standard Operating Procedures	<ul style="list-style-type: none"> Standard Operating Procedures will be developed with a focus on deployment in light of public awareness expectations and relevant legislation for the lawful placement of the combined enforcement officers. Current policies, procedures, standards, guidelines, training requirements and records will be inventoried and reviewed, with an intent to standardize system documents, identify gaps and address informal practices.
Facilities	<ul style="list-style-type: none"> To focus security oversight, and reduce drug poisoning risks, select washrooms within the LRT system will be temporarily closed. In order to provide access to washrooms, COTT will redirect people to nearby facilities.

If Council approves the Transit Safety Plan, Administration will enter into a Memorandum of Understanding with Edmonton Police Service, Bent Arrow Traditional Healing Society and other

Transit Safety and Security

stakeholders as needed (e.g. Alberta Health Services) to pilot the Transit Safety Plan for up to three years.

The following questions will be explored as this work proceeds:

1. *How can security guards most effectively support the LRT system?* Currently, security guards are deployed using analytics and are often the first line of response for medical and safety issues.
2. *What does Transit Peace Officer support look like as the LRT network is expanded?* Administration will need to determine an ideal resource complement to provide service and supports to transit patrons and vulnerable Edmontonians.
3. *In what circumstances should the City consider reduced access to transit facilities?* Administration is evaluating operational policies and best practices to understand if/when facility bans would be fair and appropriate. Administration is also considering if some areas of LRT facilities should be access restricted through physical means (ie. using a barrier system to restrict access to “paid” areas).
4. *Are there additional options to enhance safety for the public, transit employees, support providers and enforcement teams?* A strong collaborative relationship between enforcement officers and outreach workers is necessary to build trust with the marginalized populations.

Budget/Financial Implications

The three year pilot program (2023-2025) requires \$3.9 million in funding from 2022 to 2025 (annual costs of \$1.27 million, for 3 years, with a one time \$60,000 vehicle purchase) as outlined below:

Item	Cost	Funding Source
Allocate a project director to oversee the operations	\$185,000/year for 3 years = \$555K	Edmonton Police Services funds held corporately within Financial Strategies
Additional resources for COTT: <ul style="list-style-type: none">• three peace officers• three outreach workers One outreach coordinator	\$830,000/year for 3 years = \$2.49M	Funded equally from: <ul style="list-style-type: none">• Edmonton Police Services funds held corporately within Financial Strategies• COVID-19 funds with the appropriated Financial Stabilization Reserve• Financial Stabilization Reserve
Additional vehicle for the COTT team	\$60,000 (One time)	
Two Transit Peace Officer foot patrol sergeant positions	\$250,000/year for 3 years = \$750K	

In summary, the proposed funding for the entire plan would come from the following sources:

- \$1.1 million - COVID-19 funds with the appropriated Financial Stabilization Reserve.
- \$1.7 million - Edmonton Police Services funds held corporately within Financial Strategies.
- \$1.1 million - Financial Stabilization Reserve.

Transit Safety and Security

Legal Implications

Administration has the ability to direct Peace Officers through policies, procedures, standards and guidelines following Council's governance direction. The documents related to Peace Officer operational expectations could be made public for the benefit of transparency. Additionally, Council could direct Administration to consider amendments to the Conduct of Transit Passengers Bylaw. With direction from City Council, an amended Bylaw could be brought forward which could address potential issues with respect to direction and responsibilities of Peace Officers and how to address concerns involving marginalized populations.

COMMUNITY INSIGHT

Transit Riders

Transit riders have shared their feedback through many channels including formal research, input to 311, social media and correspondence to their Councillors. Many patrons have expressed concerns about an increase in drug use and social disorder in public spaces. Some transit riders feel uneasy, and at times, unsafe, in this environment but also demonstrate concern for their community members who are impacted by homelessness, mental health challenges and the drug poisoning crisis.

Formal research advises Administration that:

- Since 2015, perceptions of feeling safe overall in public transit have fallen slightly from a high of 83 per cent to 78 per cent in 2021.
- In 2021, perceptions of feeling unsafe at a transit stop or station have varied. In the last three months of the year, perceptions of feeling unsafe improved month-over-month from twelve percent of riders feeling unsafe to five per cent.

Marginalized Edmontonians

Advocates for, and agencies providing services to, marginalized Edmontonians have emphasized the need for systemic solutions that treat all people with respect, compassion and dignity — marginalized Edmontonians access transit facilities due to necessity, not by choice. Administration and the Edmonton Police Service agree that wraparound supports, which include harm reduction services, culturally appropriate shelter services, permanent supportive housing and comprehensive healthcare are all components required for a sustainable solution.

Business Community

The business community has noted that with the lower pedestrian-traffic as a result of the pandemic, downtown residents and businesses have reported an increase in crime and a decrease in perceived safety. The Downtown Recovery Task Force has outlined the need for a coordinated response to enhancing safety and security and has recommended action be prioritized in three areas:

- Develop and action an inter-governmental advocacy strategy to secure resources for marginalized Edmontonians and community safety initiatives.
- Fund additional 24/7 supports and programming for homeless and at-risk people Downtown.

Transit Safety and Security

- Increase the number and frequency of Edmonton Police Service and Peace Officer foot patrols in the Commercial and Cultural Core of Downtown, to address drug-related crime and heighten public perceptions of security.

Considering All Perspectives

Throughout the three year pilot period, Administration will gather feedback from diverse Edmontonians and organizations that may be able to speak to transit safety and security at personal and systems levels. The actions resulting from this listening will include evaluating the role of outreach workers in the social support sector and analyzing the efficacy of the foot patrol model, with respect to crime and violence prevention.

GBA+

Attachment 3 outlines GBA+ findings and recommendations for this report.

ATTACHMENTS

1. Transit Safety & Security Logic Model
2. Edmonton: Safe City- The Community Response to Preventing and Addressing Sexual Violence Against Women and Girls in Public Spaces
3. GBA+ Reporting

Transit Safety & Security Logic Model

Goal - Riders have a safe public transit experience in Edmonton				
Components (Transit Safety & Security framework*)	Inputs	Outputs	Key Measures (non-exhaustive)	Short & Medium-term Outcomes
Environmental design (roads; pathways; transit stops; infrastructure) Mass transit planning and transit network design Policies and procedures Education, social support and outreach Technology and equipment Policing and security	<ul style="list-style-type: none"> • Mass transit plans • Safe mobility strategy • Crime Prevention Through Environmental Design (CPTED) assessments • Infrastructure design guidelines • 24/7 Control Centre • Employees (Transit Peace Officers; Transit Inspectors; Transit Operators; Security Dispatchers, etc) • Contracted Security guards • Deployment data • Community outreach & support • Operating procedures • Escalation protocols & incident notifications • Mental health supports & critical incident protocols • Bylaws • Training programs • Hazard assessments • Marketing campaigns • Bystander awareness program • Proactive patrols • Calls for service (EPS, TPOs, EMS, etc) • Safe Cities and Safe Public Spaces Global Initiative • SafeCityYEG map 	<ul style="list-style-type: none"> • Updated transit network • CPTED recommendations • Infrastructure safety upgrades • Integrated governance model • Occupational Health & Safety recommendations • Community outreach interactions • On-going learning for staff • Critical incident support & escalations • Identification and monitoring of “hot spot” locations • Marketing campaign collateral • Hazard assessment tools 	Security disorder rate per 100,000 boardings Rider satisfaction of safety in transit Number of Operator assaults per year Number of community outreach interactions Number of criminal incidents on transit property Number of calls for service received Number of events dispatched from calls	Improved safety and security for public transit riders Increased collaboration among social agency, EPS and City administration to support public transit user safety Reduced Operator assaults Reduced criminal incidents on transit property Reduced mischief and disorder Services promote mode shift to public transit and active transportation modes
Long-term Outcomes - Edmonton is a safe city, Edmontonians use public transit and active modes of transportation				

Attachment 1

*Framework was developed and approved in 2019, considering best practices and recommendations from the Mineta Transportation Institute (<https://transweb.sjsu.edu/sites/default/files/2611-women-transportation.pdf>)

EDMONTON: SAFE CITY

**The Community Response
to Preventing and Addressing
Sexual Violence Against Women
and Girls in Public Spaces**

**COMMUNITY COLLABORATION
COMMITTEE RECOMMENDATIONS
TO THE CITY OF EDMONTON AND
CULTURE, MULTICULTURALISM
AND STATUS OF WOMEN**

February 20, 2020

Acknowledgements

We acknowledge and are honoured that Edmonton is Treaty 6 traditional territory, a traditional meeting ground, gathering place, and travelling route to the Cree, Saulteaux, Blackfoot, Métis, Dene and Nakota Sioux. We also acknowledge that the Metis also share a deep connection with the land. We acknowledge all the First Nations, Métis, and Inuit whose footsteps have marked these lands for centuries.

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Overview

The Issue

Sexual violence against women and girls is a serious problem in Edmonton and across Canada. In 2017, the Gender-based Violence and Sexual Assault Prevention Initiative sponsored by Councillors Bev Esslinger and Scott McKeen at the City of Edmonton commissioned a research study on sexual and gender-based violence. The study found that there was a need to promote the prevention of gender-based violence, and to make public spaces safer for women and girls.

United Nations (UN) Women Safe Cities and Safe Public Spaces Global Initiative

In 2016 the City of Edmonton, in partnership with Culture, Multiculturalism and Status of Women, joined the United Nations (UN) Women's Safe Cities and Safe Public Spaces Global Initiative to build safe and inclusive public spaces for women and girls in Edmonton. In 2017, a scoping study was conducted which identified three priority areas of focus: responding to and reporting sexual violence; transportation as a site where sexual violence occurs; and Indigenous women and girls as a group who have been made more vulnerable to sexual violence.

Collaborative Response

In 2018, community groups, Indigenous organizations, academia, corporate partners, and government representatives came together as the Edmonton: Safe City Community Collaboration Committee (Collaboration Committee) to recommend strategies that were evidence-based, actionable and sustainable which would make public spaces safer for women and girls.

Gathering International Evidence-Based Solutions

In October 2018, the City and partners, along with UN Women, co-hosted the fourth Safe Cities and Safe Public Spaces Global Leaders' Forum. Delegates shared successful evidence-based solutions which augmented the expertise of the Collaboration Committee when developing local solutions for Edmonton.

Recommendations

This report is a summary of the Collaboration Committee's recommendations to the City of Edmonton and the Ministry of Culture, Multiculturalism and Status of Women to reduce sexual violence and make public spaces safer for women and girls. The actions will be reviewed by partners to determine who is responsible for each action, based on scope, expertise, financial and human resources required.

The Need to Address Sexual Violence in Public Spaces

Gender-based violence, including sexual violence, continues to undermine the health, social and economic well-being of women and girls in Edmonton. Sexual violence in public spaces reduces freedom of movement; hinders the ability to participate in school, work and public life; limits access to essential services; and affects participation in, and enjoyment of, cultural and recreational opportunities.

The disproportionately high rates of sexual violence against Indigenous women and girls further reinforces the urgency of addressing this problem. In 2014, Alberta had the second highest number of missing and murdered Indigenous women and girls in Canada.¹ According to the federal Department of Justice, in 1980 Indigenous women accounted for nine percent of female homicide deaths in Canada, while in 2014, they accounted for 21 percent, despite the fact that Indigenous women represent only four percent of Canadian women. The number of

Indigenous women killed was six times higher than non-Indigenous women.²

Sexual violence remains a highly unreported crime in Canada. It is estimated that 95 percent of sexual assault incidents are not reported to the police.³ Although Edmonton had one of the highest rates of self-reported sexual assaults in the country (74.2 reported assaults for every 100,000 people), survivors need to be encouraged to report so that they can be supported, and perpetrators can be held accountable for their actions.

Vision For Edmonton: Safe City Project

In Edmonton, women and girls in all their diversity, participate freely and fully in public spaces without fear or experience of sexual violence.

¹ Native Women's Association of Canada, *Fact Sheet: Missing and Murdered Aboriginal Women and Girls*. Retrieved from https://www.nwac.ca/wp-content/uploads/2015/05/Fact_Sheet_Missing_and_Murdered_Aboriginal_Women_and_Girls.pdf, 2015.

² Department of Justice. *Missing and Murdered Indigenous Women and Girls*. Retrieved from <https://www.justice.gc.ca/eng/rp-pr/jr/jf-pf/2017/july04.html>, 2017.

³ Rotenberg, C. *From arrest to conviction: Court outcomes of police-reported sexual assaults in Canada, 2009 to 2014*. Retrieved from <https://www150.statcan.gc.ca/n1/pub/85-002-x/2017001/article/54866-eng.htm>, 2017.

Joining a Global Movement

United Nations (UN) Women's Safe Cities and Safe Public Spaces Global Initiative

In July 2016, the City of Edmonton became the 25th member city of the United Nations (UN) Women's Safe Cities and Safe Public Spaces Global Initiative (UN Women Safe Cities Initiative).

The United Nations Women's Safe Cities Initiative supports comprehensive approaches to the prevention of, and response to, sexual violence in cities around the world. The global initiative focuses on the unique role that cities can play in violence prevention and the ways that city programs, services and planning can contribute to the creation of safe public spaces.

Member cities begin their work by conducting a scoping study to develop a clear picture of sexual violence in their city. Working closely with key stakeholders, cities then build strategies to address sexual violence in the priority areas identified in the scoping study. These strategies are based on local contexts and include responses such as strengthening laws and policies, investing in safety of infrastructure, changing social norms, and ensuring evidence-based models are utilized to provide appropriate support to survivors of sexual violence.

UN Women Safe Cities Initiative plays a supporting role, linking cities to information, best leading practices and other resources.

Scoping Study

In Spring 2018, the City of Edmonton and Culture, Multiculturalism and Status of Women released a scoping study to better understand sexual violence in Edmonton's public spaces.

The study was executed in two phases. Phase 1 looked at developing a picture of sexual violence against *women and girls in all of their diversity* in Edmonton. This began with a literature review on sexual violence in Edmonton's public spaces, followed by engagement with organizations and individuals with specific expertise in, and lived experience of, sexual violence. The research consisted of nine focus groups, eight interviews, four meetings with stakeholder organizations and 10 written submissions. In Phase 2, additional research was conducted on the priority areas identified in Phase 1.

What We Found – Literature Review and Stakeholder Data

A qualitative thematic analysis of the findings of the literature review and the stakeholder data collection revealed that:

- The most frequent types of sexual harassment that occurs in public spaces include:
 - verbal harassment
 - unwanted sexual remarks
 - unwanted sexual touching
 - other forms of unwanted touching
 - repeated following and stalking with sexual aggression
- The public places in which women and girls are subjected to sexual violence include:
 - transitional space (to and from school, work and home)
 - public transit
 - taxis
 - ride-sharing services
 - central areas of Edmonton
 - indoor public spaces such as malls and recreation centres
 - bars and restaurants
- Some groups of women and girls have been made more vulnerable than others, including Indigenous women and girls, girls between the ages of 13 and 18 years, young women ages 18 to 25 years, racialized women, and gender minorities.
- The most common reason women do not report incidents of sexual violence is the fear they will not be believed or that they will be blamed.
- Sexual violence is seen as a 'normalized', 'everywhere', 'expected' part of everyday life, and as being endemic in our society. Persistent fear of sexual violence affects the way Edmonton women use or avoid public spaces, as well as their participation in community and civic life.

Areas of Focus

Based on the literature review and stakeholder engagement three priority areas for further research were identified:

- Responding to and reporting sexual violence
- Transportation as sites for sexual violence
- Indigenous women and girls as a group who have been made more vulnerable to sexual violence

Reporting and Responding

Reporting refers to providing a formal account or statement about an incident of sexual violence to an organization or institution that has the authority to take action to address the incident. Responding refers to the various processes of providing support to women who have experienced sexual violence, including investigations that hold perpetrators accountable for their actions. The most common reason for women not reporting incidents of sexual violence is the fear that they will not be believed. Victims of sexual violence who do report often get blamed and their experience is attributed to multiple factors such as where they live, being in the wrong place, and/or what they were wearing. Overall reporting of sexual violence in Canada is low, and survivors need to be encouraged to report incidents. However, the rate of police-reported sexual assaults in Edmonton is higher than the Canadian average. Initiatives to encourage reporting, as well as the impact of the #MeToo movement may have contributed to Edmonton's increase of reported assaults.

Transportation

Transportation includes, but is not limited to public transit, taxis, and ride-sharing services. More broadly, transportation encompasses the movement to and from sites of transportation, along with the various modes people use to get from one place to another. The most frequent types of sexual violence experienced by women and girls on public transportation, in taxis and in ride-sharing services, were verbal abuse, unwanted sexual touching, stalking, followed by sexual aggression (after a woman/girl leaves public transport).

Indigenous (Aboriginal) Women and Girls

Indigenous women experience significantly higher rates of violence than non-Indigenous women. Indigenous women are nearly three times more likely to report being violently victimized and are more likely to experience multiple forms of violence than non-Indigenous women. Additionally, the majority of violent acts towards Indigenous women are often not reported to the police. These challenges are further compounded by a lack of culturally appropriate resources to prevent and address sexual violence. Across Canada there is a heightened awareness of the need to respond to the serious and prevalent issue of violence against Indigenous women and girls. A number of strategies and actions led by orders of governments, municipalities, and non-governmental organizations including community and grassroots organizations are underway, including governments' responses to the National Inquiry on Missing and Murdered Indigenous Women and Girls Final Report.

Recommendations

The Edmonton: Safe City Community Collaboration Committee has recommended prevention and intervention strategies based on the three priority areas identified in the scoping study. The first three themes under the prevention strategies have been identified as priorities.

Guiding Principles for Actions

- Communities need to be safe places for women and girls.
- Survivors should be able to access timely culturally appropriate services and supports.
- All partners must be intentionally engaged and take responsibility to create and implement evidence-based solutions that result in positive change.
- Prevention and intervention strategies to reduce sexual violence must be data informed. Data collection should include intentional consideration of, and engagement with, individuals made more vulnerable to sexual violence.
- Colonization should be recognized as the root cause of sexual violence against Indigenous women. Colonization is perpetuated through historical and contemporary discriminatory policies and practices which result in the marginalization and violence against Indigenous women.

Implementation

Some of the actions can be implemented in the short term, while others address more complex, systemic challenges, and are long term. Recommended actions will require collaboration (between community as well as between orders of government), and the responses need to be innovative and adequately resourced (human and financially). Implementation should be aligned with other relevant reports such as the Final Report of *National Inquiry on Missing and Murdered Indigenous Women and Girls*, as well as City of Edmonton and Culture, Multiculturalism and Status of Women initiatives and commitments, such as the Alberta Commitment to End Sexual Violence.⁴

⁴. Government of Alberta Commitment to End Sexual Violence. Retrieved from <https://www.alberta.ca/commitment-to-end-sexual-violence.aspx>

Prevention of Sexual Violence In Public Spaces

Inclusion of Indigenous Perspectives in Developing Interventions

Indigenous leaders, women and youth need to be included, heard, and their perspectives reflected in government decision-making to ensure supports are available to Indigenous survivors of sexual violence.

Recommendations:

1. When responding to sexual violence against Aboriginal/Indigenous women and girls, implement Indigenous-led justice response models, preferably with Indigenous representation in order to provide culturally appropriate supports.
2. Enhance and support ongoing relationships between sexual assault support organizations, Indigenous organizations and police services to improve service delivery to sexual violence survivors for service delivery to support women and girls.

Policy Amendment

City bylaws and policies may support a reduction of sexual harassment in public spaces.

Recommendation:

1. Amend bylaw 14614 to include prohibiting sexual harassment in public spaces.

Education and Awareness

Raising awareness and public education can shift attitudes and behaviours to prevent sexual violence in public spaces.

Recommendations:

1. Develop a bystander-focused social marketing campaign on sexual violence in public spaces which is prevention-focused, coordinated, evidence-based and adapted for different spaces. Ensure that this campaign embraces an Indigenous lens.
2. Provide support and enhancement of effective, ongoing campaigns such as the I Believe You⁵ and Moose Hide Campaigns⁶.

Ensure Safety of Public Infrastructure

Use a gender-based plus analysis⁷ in the planning and ongoing maintenance of public infrastructure to ensure the safety and well-being of Edmonton women and girls.

Recommendations:

1. Leverage relationships with City of Edmonton departments to ensure that a gender-based plus analysis is used in the planning of new public facilities and infrastructure.
2. Conduct safety audits of existing public infrastructure to identify where improvements can be made.

⁵. #IBelieveYou. Retrieved from <https://www.ibelieveyou.info/>, 2019.

⁶. Moose Hide Campaign – Standing Up Against Violence. Retrieved from <https://moosehidecampaign.ca/>, 2019

⁷. GBA+ is an analytical process used to assess how diverse groups of women, men and non-binary people may experience policies, programs and initiatives. Status of Women Canada, *What is GBA+?*, <http://cfc-swc.gc.ca/gba-acsc/index-en.html>

Intervention in Sexual Violence in Public Spaces

Training for First Responder/Justice Roles

Ensure evidence-based, trauma-aware, ongoing and coordinated training is available for those in key first responder and justice roles.

Recommendations:

1. Identify training programs for first responders that provides skills to support women from culturally diverse backgrounds and to ensure that they are treated with dignity and respect.
2. As a primary response to effectively support survivors of sexual violence, Edmonton Police Service should participate in effective ongoing cultural- sensitivity training to ensure survivors are appropriately supported.
3. Train and provide educational materials to Crown prosecutors on a trauma-informed approach to sexual violence prosecutions.
4. Support, where appropriate, the continuous review and evaluation of training.

Connecting Survivors to Support Services

Ensure survivors are connected to supports which are survivor-focused and led.

Recommendations:

1. Implement the donation of phones with emergency calling capabilities from public and private organizations to individuals who have self-identified, or been identified by agencies to be at a higher risk of experiencing sexual violence.
2. Install new and additional emergency phones or buttons in high-risk areas identified through available data that connect directly to the police or Association of Alberta Sexual Assault Services (AASAS) One Line.

3. Explore alternative reporting options such as online, formalized third party and Edmonton Transit Services specific reporting line.
4. Support the Edmonton Transit Services initiative to have wifi available at all transit locations to ensure users can access support as needed.

Reporting Sexual Violence

Continue to encourage survivors to report sexual violence which can increase accountability of perpetrators and deter them from continuing to offend others.

Recommendations:

1. Promote the use of Edmonton Police Service's new online police reporting tool and encourage survivors to report sexual assault.
2. Support Edmonton Police Service in their ongoing efforts to foster relationships with community-based sexual assault centres.

Safety Protocols on Public Transportation

Implement appropriate safety protocols and standards for various modes of publicly accessible transportation.

Recommendations:

1. Edmonton Transit Service and Community Standards should continue to evaluate security at transit centres and LRT stations to ensure that the security concerns of women and girls are being proactively addressed.
2. Enhance formal protocol and training for Edmonton Transit Service and local Peace Officers' response to sexual violence.
3. Share recommendations on safety features and training incorporated by public transportation service providers with taxi and ride-sharing services.

Relationship Building

Establish or leverage existing Collaboration Committee to advise on implementation of recommendations and share information.

Recommendation:

1. Invite community organizations and academia to be ad-hoc or full members of relevant committees and working groups.

Next Steps

The City of Edmonton, in collaboration with Culture, Multiculturalism and Status of Women, will determine which recommendations can be addressed in the short and long term based on the financial and human resources available. They will then work with community partners to implement the recommendations.

Glossary

First Responder

Professionals in a position of authority who are first approached by, or respond to survivors, to provide safety, support and guidance.

Gender-based Plus (GBA+) Analysis

An analytical process used to assess how diverse groups of women, men, and non-binary people may experience policies, programs and initiatives.

Public Spaces

Public spaces are the focus of the UN Women Safe Cities Initiative. The City of Edmonton and Culture, Multiculturalism and Status of Women recognize that sexual violence can begin in public spaces and move into private spaces, or begin in private spaces and move into public spaces. The initiative will include spaces that are publicly accessible to the majority of people.

Scope

The Edmonton: Safe City Initiative partners will identify the extent of work to be implemented and decide which partner is responsible for the action items.

Sexual Violence

Sexual violence is a broad term that refers to any non-consensual activity of a sexual nature that violates a person's sexual integrity. It is characterized by a continuum of aggression, harassment and violence. Sexual violence includes sexual assault; sexual harassment; sexual intimidation; threats; stalking; indecent exposure; voyeurism; cyberstalking and cyber harassment; non-consensual dissemination of sexual imagery; sexual extortion; online luring; and sexual exploitation.

Sexual Harassment

Sexual harassment includes unwelcome sexual comments, attention, actions or gestures. As is the case for other forms of sexual violence, a key component to sexual harassment is that someone does these actions without consent, permission, or agreement of the person or persons they are targeting. Sexual harassment includes non-contact forms, including sexual comments about a person's body parts or appearance, whistling while a woman or a girl is passing-by, demands for sexual favors, sexually suggestive staring, following, stalking, and exposing one's sexual organs to someone. Sexual harassment also includes physical contact forms, such as purposely brushing up against a person on the street or on public transportation; or grabbing, pinching, slapping, or rubbing against a person in a sexual way.

Survivor

A survivor is a person who has been victimized and copes with the trauma, while working on getting beyond the traumatic event. Survivors of sexual violence often experience short and long term physical and psychological impacts based on their experience of sexual violence.

Women and Girls in All Their Diversity

The UN Women Safe Cities Initiative is focused on women and girls in all their diversity because sexual violence is rooted in discrimination, structural and gender inequality. Particular groups of women and girls, such as Indigenous, newcomers, and LGBT individuals, experience higher levels of sexual violence than the general population. Furthermore, to successfully prevent and address sexual violence, there must be acknowledgement of the power differential that exists between men, women, and people of diverse identities and expressions.

Contributors and Acknowledgement

Edmonton: Safe City Community Collaboration Committee

- Dr. Lise Gotell, University of Alberta
- Glen Dennis, City Operations, City of Edmonton
Kari Thomason, Métis Child and Family Services Society
- Kristina Midbo, Women's Advocacy Voice of Edmonton Committee
- Lindsay Dennison, Justice and Solicitor General
- Mary Jane James, Sexual Assault Centre of Edmonton
- Michael van Hemmen, Uber
- Rachelle Venne, Institute For The Advancement of Aboriginal Women
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Ministry of Culture, Multiculturalism and Status of Women:

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We thank all the research respondents, including all the women and girls who shared their personal stories, experiences, and suggestions through individual interviews, focus groups, and written submissions. Thank you also to Kim Ghostkeeper, Jennifer Beyer and Claire Ashton for their facilitation of the Collaboration Committee meetings.



GBA+ REPORTING

PROJECT/INITIATIVE NAME: Transit Safety and Security

Branch Community Standards and Neighbourhoods
Social Development
Edmonton Transit Service
Office of the Chief of Staff

Department Community Services
City Operations
Office of the City Manager

Date: January 27, 2022

1. DESCRIPTION OF PROJECT OR INITIATIVE

COVID-19 has impacted transit agencies across North America and stay-at-home measures have caused a decline in transit ridership levels. Lower transit ridership has resulted in fewer people in transit areas and therefore less natural surveillance in transit facilities. At the same time, there is an increasing number of homeless people in our city and the drug poisoning epidemic means a number of homeless folks are using drugs in public spaces including streets and transit stations. Those circumstances also make transit centres attractive to criminals who take advantage of vulnerable people. Taken together, these elements have created conditions that lead to transit riders feeling uneasy and, at times, unsafe.

2. OVERVIEW OF GBA+ IMPACT

Administration continues to examine best practices and work with entities that receive funding to pursue innovative solutions that reduce barriers for those who need support,

GBA+ PROCESS

3. REFLECT

Perspectives of the project team:

- Highly educated
- English speaking and reading (First and second languages)
- Mix of Canadian-born and immigrants to Canada
- Majority of the group identifies as female and is cis-gendered
- Have access to stable housing
- Mixture of frequent and occasional transit users
- Lived experience in low income household
- Employment status: All have stable, full-time work, currently many of which are working remotely and

may not be using transit and/or public spaces as frequently

Perspectives missing:

- People currently experiencing homelessness and/or substance use disorders.

4. RESEARCH

Quantitative and qualitative research findings were taken from monthly surveys that ETS undertakes to assess rider satisfaction with a third party research provider. Survey research inherently does not reach all participants (i.e. they need to have access and awareness of the survey, have a means to complete the survey such as a phone, computer and internet access, they have to read and understand the language of the survey, etc.). Thus, despite our best efforts for a representative sample, there can be voices left out of traditional research methods. The City continues to integrate with key community stakeholders and partners to strengthen community engagement and awareness for all users of transit and transit spaces.

Informal research on social media has provided the project team with another perspective into the experience of transit riders.

5. ENGAGE

In 2019, Administration presented CR_6899, Policy for Helping Vulnerable Residents During Extreme Weather Incidents, and shared insights gathered from individuals who accessed Central LRT Station overnight. Three themes emerged:

1. Some individuals thought emergency shelters were full or could not access them due to being banned previously.
2. Some individuals slept in shelters when Central LRT Station was closed/unavailable; however, they left emergency and temporary shelters when the station became an option.
3. Community centres like Boyle Street Community Services were seen as providing adequate shelter during the day.

Multiple, regular surveys are completed throughout the year for ETS ridership.

6. FINDINGS AND RECOMMENDATIONS

6a) Finding statement(s):

1. Compared to bus-only riders, LRT riders tend to have more people in the 25 to 44 years old range and fewer youth (under 24).
2. LRT riders tend to be higher income than bus-only riders.
 - 32 per cent of LRT riders have a household gross annual income of \$100k or more, compared to 18 per cent of bus-only riders.
 - 32 per cent of bus-only riders have a household gross annual income under

6b) Equity Measure Recommendation(s):

1. Individuals who are homeless continue to be assisted to find adequate shelter as LRT stations do not provide adequate sleep conditions and there are concerns around health and safety, cold temperatures, limited amenities including washrooms and the coordination of food and water for those staying overnight.
 - a. Request ongoing funding allocation for the Community Outreach on Transit Team (COTT)
 - b. Continue with building and staffing

<p>\$40k per year, compared to 16 per cent of LRT riders.</p> <ol style="list-style-type: none"> 3. Employment status - more LRT riders tend to be employed full time and part time than bus-only riders, and among bus-only riders there are higher proportions of people who are unemployed or unable to work. 4. More than 2,800 individuals in Edmonton are experiencing homelessness. 5. Nearly 60 per cent of homeless individuals are Indigenous, despite being only 5 per cent of the overall population. 6. Of the more than 2,800 individuals experiencing homelessness. <ul style="list-style-type: none"> o Approximately 690 individuals are children - either dependents or independent youth. o Approximately 42 percent of homeless individuals identify as female. 7. Some homeless individuals have thought emergency shelters were full or could not access them due to being banned previously. 8. Some individuals slept in shelters when Central LRT Station was closed/unavailable; however, they left emergency and temporary shelters when the station became an option. 9. Community centres like Boyle Street Community Services were seen as providing adequate shelter during the day. 10. The drug poisoning crisis has seen significant increases in medical calls on ETS property. <ul style="list-style-type: none"> o Calls for medical aid have increased 819% since 2017 with TPOs attending nearly 1500 calls in 2021. 11. 10% of the calls for TPO service involve check on people's welfare (almost 8000 in 2021) 	<p>public washrooms</p> <ol style="list-style-type: none"> c. Review and enhancement of the Encampment Response in 2022. d. Continue with affordable housing initiatives and advocacy efforts. <ol style="list-style-type: none"> 2. Continuing with the Safe City YEG initiative, as making transit safer for women and girls makes it safer for everyone. Including upcoming work on the following: <ol style="list-style-type: none"> a. Missing and Murdered Indigenous Women & Girls Calls for Justice b. Bystander Awareness Training 3. Evaluate if the temporary shelter bus was successful and resources allocated effectively. 4. Administration to provide Indigenous-led trauma-informed training to employees and leadership. 5. Evaluate the equipment and role of those who respond to medical calls on Transit property.
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7. IMPLEMENTATION

In this section, record:

- *How you will implement/have implemented the equity measures, including timing (e.g. some may be implemented immediately, some noted for the future).*
- *If possible, identify any resources (eg. staffing, materials, etc) that will be allocated to implement equity measures.*

REMOVAL OF BARRIERS FOR THE HOMELESS

As a limited funder of the homeless-service sector, the City endeavours to include contractual provisions in its agreements with agencies to best ensure the removal of barriers to access for vulnerable persons experiencing homelessness, including the development of Council approved shelter standards for the emergency shelters in Edmonton. While we are not the primary funder, all efforts are being made to support the adoption and implementation of the shelter standards to improve equitable access of these spaces to people experiencing homelessness. The City is working with the Alberta Government, Ministry of Community and Social Services to adopt the shelter standards as part of funding agreements.

Since 2019, the City's response to Extreme Weather Response has been guided by the following principles:

- **Safety First:** The health and safety of individuals is of paramount importance.
- **Connected:** All efforts will be made to align the City of Edmonton's response with existing efforts and resources, with a focus on connecting people to the supports that best meet their needs.
- **Respectful:** All individuals are served with dignity and respect.
- **Efficient and Effective:** Responses, community plans, and protocols are robust and time tested, based on proven best practices.
- **Housing First:** All efforts will be made to ensure that those who are experiencing homelessness are connected to supports to find permanent, safe and affordable housing.

TRANSIT

- Ongoing GBA+ analysis of the safety and security system on ETS.
- Equity analysis of the transit network is underway.
- Anti-racism review of low income transit fare programs is underway.

SAFETY AND SECURITY

- Provided trauma-informed training to Community Standards and Neighbourhoods extended leadership team. The course was delivered by Native Counselling Services of Alberta.
 - Planned extension to frontline teams in 2022.
- TPOs have been trained in advanced first aid, AED deployment, and Naloxone administration. TPOs are frequently on scene to medical incidents before responding healthcare professionals and routinely administer Naloxone.
- A tripartite arrangement between Social Development, Community Standards and Neighbourhoods, and ETS supports a shelter shuttle bus between many of the transit centres and LRT stations, and emergency shelter locations. This bus runs between December and April, and provides transport to more appropriate sheltering options for those in need.

SAFECITY - YEG

- Transit Watch implemented
- Bystander project
- Infrastructure projects for ETS will use a GBA+ perspective

8. EVALUATION

In this section, record:

- *Your plans to evaluate the effectiveness of the project/initiative, including the effectiveness of equity measures implemented.*

Measures of success and evaluation will be worked through as an action item at the Tripartite and working group tables.



COUNCIL SERVICES COMMITTEE REPORT

Council Agenda Management

Recommendation of the Committee

1. That Council approve a pilot for all Standing Committees where a Councillor may ask questions or speak multiple times in relation to a single item for a maximum of 5 minutes for the first round and 3 minutes for any subsequent rounds.
2. That Administration prepare the following amendment to Bylaw 18155 - Council Procedures Bylaw:
 - Amend Section 24 (e) by adding the word business 2 business days.

History

At the February 8, 2022, Council Services Committee meeting, the February 8, 2022, Office of the City Clerk report OCC01048 was considered.

Related motion made at the February 8, 2022, Council Services Committee meeting

That Council Services Committee recommend to Council:

That Administration prepare the following amendment to Bylaw 18155 - Council Procedures Bylaw:

- That Section 24 (e) be amended to include provisions to notify the City Manager, Chair and City Clerk in advance as per Section 2.

Defeated: 3-9-1



COMMUNITY AND PUBLIC SERVICES COMMITTEE REPORT

Anti-racism Strategy

Recommendation of the Committee

1. That the Anti-Racism Strategy, as set out in Attachment 5 of the February 14, 2022, Community Services report CS00872, be approved.
2. That the 2022 operating expenditure budget for the Social Development branch be increased by \$2 million on a one-time basis, with funding from the Edmonton Police Services funds held within Financial Strategies.

History

- At the February 14, 2022, Community and Public Services Committee meeting, the February 14, 2022, Community Services report CS00872 was considered.
- The Committee heard from S. Rolingher and M. Hundert, Diversity Centre of Edmonton; B. Brusselers; S. Haji, Africa Centre; O. Yaqub, L. Awwad and T. Mohamed, Islamic Family and Social Services Association; T. Daley; G. Dunn, Edmonton Chamber of Voluntary Organizations; E. Jones; J. Jamerson, Black Women United YEG; R. Forgues-Jenkins; U. Odebala, Reez Community Foundation; E. Dehnavi, Centre for Race and Culture; A. Boychuk; L. Cardinal, EndPovertyEdmonton Indigenous Circle; K. Boucher, EndPovertyEdmonton; and W. Rahmat, Sisters Dialogue.

Attachment

February 14, 2022, Community Services report CS00872

Anti-Racism Strategy

RECOMMENDATION

That Community and Public Services Committee recommend to City Council:

1. That the Anti-Racism Strategy, as set out in Attachment 5 of the February 14, 2022, Community Services report CS00872, be approved.
2. That the 2022 operating expenditure budget for the Social Development branch be increased by \$2 million on a one-time basis, with funding from the Edmonton Police Services funds held within Financial Strategies.

Report Purpose

Council approval required

Council is being asked to approve the Anti-Racism Strategy to support the equity of racialized communities in Edmonton, structural changes within the City of Edmonton Administration, as well as the development of an implementation and financing plan to activate the Strategy. This work will be prioritized in Administration's work for the long-term City Plan alignment.

Previous Council/Committee Action

At the November 1-5, 2021, City Council meeting, the following motion passed:

That Administration work with the Anti-Racism Advisory Committee and the BIPOC community, in a collaborative decision making way, to develop actionable items and a comprehensive strategy on anti-racism that:

1. address hate based violence and supports for communities experiencing hate and violence;
2. champion anti-racist and anti-violence initiatives to the provincial and federal governments to secure resources and support, and advocating for legislative tools; and
3. work with partners to support and amplify anti-racist initiatives and responses.

Executive Summary

- Anti-racism can be defined as the active, ongoing strategy and process that seeks to identify and eliminate racism by changing systems, institutions, policies, and attitudes

Anti-Racism Strategy

that perpetuate racism. For the purposes of this report, 'racialized' will refer to those who experience the impact of systemic racism, and includes Indigenous Peoples, Black and People of Colour.

- The proposed Anti-racism Strategy outlines the three elements to advance the ongoing efforts of anti-racism in Edmonton:
 - **Independent Anti-racism Body:** A community-driven, equitably resourced body that is independent from other city bodies (such as City of Edmonton Administration, Edmonton Police Service, school boards and districts, etc.) will be established to oversee anti-racism in Edmonton and have the ability to stimulate reflection on and challenge systemic racism at all levels in Edmonton.
 - **High Level Anti-racism Organization in City Administration:** A new anti-racism organization within Administration will be created to challenge racism within the City of Edmonton corporation, including challenging systemic racism, developing a culture of anti-racism, embedding anti-racist action into all processes within Administration, and acting as a collaborative partner with the Independent Anti-Racism Body to co-create a long term Anti-Racism Strategy and Plan for Edmonton.
 - **Core Operational and Capacity-Building Funding:** In order to strengthen grassroots, BIPOC-led organizations and support them to be more effective with work that empowers BIPOC communities, influences the greater Edmonton culture, and is linked to long term goals in an Anti-Racism Strategy and Plan for Edmonton; the City will establish funding for core operations, capacity-building and other needs identified through collaborative decision making.
- Should the proposed Anti-Racism Strategy be approved, an implementation plan and financing strategy will need to be developed for Council approval.

REPORT

Context

Attachment 1 outlines the perspective of the Anti-Racism Advisory Committee, BIPOC youth and members of BIPOC communities in the preparation of the Anti-Racism Strategy;

"The aim for this work was to return an Anti-racism Strategy Report to City Council in 100 days (and this presentation is close to that timeline). While the time was short, it seemed possible to complete this task given the commitment for action expressed by both City Administration and the Anti-Racism Advisory Committee. The City Manager's Office took responsibility for Administration's side of this work, supporting the various business units, and proactively aiming to do things differently than had been done before. ARAC had already developed deep relationships with those most marginalized and impacted within BIPOC communities, embodies significant expertise in grassroots anti-racism, operates a culture and process of acting in anti-racist ways, and is able to

Anti-Racism Strategy

bring these strengths to the process through its position by the motion as a collaborative partner.”

During the collaborative decision making and report writing process the Anti-Racism Advisory Committee was able to raise a number of concerns to Administration;

“Nevertheless, succeeding in bringing forward this Anti-Racism Strategy turned out to be extraordinarily difficult, and at times felt impossible, given the significant barriers built into the administrative system. When systems are built from colonial ways of thinking and acting, cultures and processes are formed which continue those perspectives. This is how systemic racism forms and exists, and this happens even when the individuals within that system desire and intend to function differently.”

The Anti-Racism Advisory Committee also included critiques around systemic racism:

“Anyone who has experienced some baseline anti-racism education has learned that this perpetuation is not personal, and may not even be conscious. It is not a failing of individuals. Rather, the systems, policies and procedures are inherently designed to function in this way. Furthermore, ...Members of ARAC, BIPOC youth and BIPOC communities appreciate and respect the work that is done by the various Branches, as well as all BIPOC staff within city administration. We honour the achievements and successes they have gained while working within the administrative system and processes.”

Administration unreservedly accepts all the feedback from the volunteers of the Anti-Racism Advisory Committee, the City of Edmonton Youth Council and other Indigenous Peoples, Black and Persons of Color stakeholders that participated in the strategy development processes as outlined in Attachment 1.

Some examples of the pressure points that occurred during the “collaborative decision making way” are a result of various work processes and work culture that currently drives Administration’s corporate system to meet the expectations of its governors. What Administration is used to is:

- Defined timelines and resources set by the system to meet deadlines
 - Communities and stakeholders need to be considered in helping and agreeing to the timelines, be equitably resourced, and be empowered with some control over those resources which aim to address equity
- Community advising, and then administration authoring reports
 - Public engagement is a different process to collaborative decision making. Stakeholders desire to collaborate on; designing processes, agreeing on the foundational perspectives, focus, tone and outcomes, and to participate in co-authoring to ensure marginalized perspectives are centered
- Editorial control

Anti-Racism Strategy

- Lack of trust from stakeholders that suggestions will not be deflected, distracted, buried or waterdowned with additional administrative jargon or other side agendas obscuring focus from community input
- Preparation for public release & coordinated messaging
 - Administration has the ability to formulate and manage narratives that advantage the system, manages risks without consideration of the impacted partners and sometimes erasing the experience of community

The development of the Anti-Racism Strategy was a challenging chemical formula with many elements that required consideration when being combined. This further impacted the relationship between stakeholders and Administration as further complexities were added. These elements were; the communications focus, accelerated timelines, policy and legal frameworks, internal deadlines, expectations of many stakeholders, navigating across different systems, structures and cultures, lack of resources, emotional labor, pandemic fatigue, and probably many other factors. These all contributed to the cumulative impacts in advancing on this strategy in such a short timeframe.

Administration will continue in its Anti-Racism journey, appreciating that it is an ongoing developmental process. The learning gained from the development of the Anti-Racism Strategy will be used to improve the next phase of this work. Administration is committed to listening, learning and adapting to new forms of collaboration in a space that requires impacted communities to be empowered to participate and lead.

History and Definitions

The City of Edmonton has had a complicated history with anti-racism initiatives and efforts. As the proposed Anti-Racism Strategy was developed, Administration worked to better understand the history of racism in Alberta, with a brief overview in Attachment 2. The proposed Anti-Racism Strategy is uniquely placed to help build a city of today and tomorrow that is more inclusive and compassionate.

It is helpful to begin with a clear definition of anti-racism for the purpose of the proposed strategy to situate it from other work.

Anti-racism can be defined as the active, ongoing strategy and process that seeks to identify and eliminate racism by changing systems, institutions, policies, and attitudes that perpetuate racism. For the purposes of this report, 'racialized' will refer to those who experience the impacts of systemic racism and includes Indigenous Peoples, Black, and People of Colour.

There are a number of key terms that are helpful to understand anti-racism work. Attachment 3 covers a glossary of terms that are used, such as intersectionality, settler colonialism, white privilege and systemic racism, which are often used in discussions. For the purpose of the Anti-Racism Strategy, it is helpful to be aware of these terms, and should the proposed strategy be approved, elaboration around these terms will continue with focused effort.

Anti-Racism Strategy

Municipal Scan

Edmonton is not unique in the landscape of Canadian cities that are calling for improved or enhanced anti-racism efforts. All the cities in Canada (see Attachment 4) have developed or are in the process of developing a strategy/action plan or framework to address anti-racism. Most of these initiatives were started in 2020-21, however some cities like Toronto initially started their work in 2017.

Cities that have included addressing anti-racism transformation within their organization include: Calgary, Vancouver, Winnipeg, Montreal and Halifax. Some of these cities have outlined specific budgets for staff positions required to plan and implement anti-racism initiatives.

Across these Canadian cities, there are different types of groups that have been tasked with leading anti-racism work with communities, e.g. Advisory Committee (Vancouver), Action Committee (Calgary), Secretariat (Ottawa), Steering Committee and Commissioner (Montreal).

In addition, Calgary, Toronto and Halifax have an outline to address anti-racism within the community.

Proposed Anti-Racism Strategy outcomes and measures

The Anti-Racism Strategy proposes addressing the following outcomes identified by the Anti-Racism Advisory Committee in Attachment 5. They are as follows:

1. Reducing, with the intent of eliminating, incidents of racism and hate-based violence in Edmonton.
2. Disempowering the causes of such violence, i.e. to disempower racism in all its forms, and empowering anti-racism into as many layers as possible in the city.
3. Stimulating healing and facilitating recovery for communities affected by hate based violence.
4. Increasing a sense of solidarity and connectedness between all diversities and communities in Edmonton.
5. Increasing knowledge of anti-racism in Edmonton and among our partners.
6. Advocating for and achieving anti-racist and anti-violence initiatives, resources and legislative tools from the provincial and federal governments.
7. Influencing all organizations and partners in Edmonton to create anti-racism strategies and policies, and connecting them to the city's long term Anti-Racism Strategy and Plan.

The outcomes will be measured using short, medium and long term measures as identified by the Anti-Racism Advisory Committee. With immediate actions being examples such as:

- Creating a clear interaction model between the Independent Anti-Racism Body, Civic Administration, City Council, BIPOC communities and partners, which forms the basis

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of collaborative decision making as well as a collective response and interaction with Provincial and Federal levels of Government for advocacy for resources, supports and legislative tools.

- Further building out a sustainable model for grant funding. The inaugural grant program was created and administered by ARAC in a volunteer capacity, with support from City administration, in order to innovate an anti-racism grant process. The amount of time and resources required does not make it sustainable or conducive to be run solely by volunteers. The anti-racist process of the inaugural grant program must be preserved and strengthened for this and additional anti-racism funding programs, while putting in place an equity model to resource the labour involved.

Three pillars that will advance anti-racism work in Edmonton for the next four years and potentially beyond. Attachment 5 goes into further elaboration on the proposed Anti-Racism Strategy and suggests actions that could support the three core pillars:

1. **Independent Anti-racism Body:** A community-driven, equitably resourced body that is independent from other city bodies (such as City of Edmonton Administration, Edmonton Police Service, school boards and districts, etc.) will be established to oversee anti-racism in Edmonton and have the ability to stimulate reflection on and challenge systemic racism at all levels in Edmonton.
2. **High Level Anti-racism Organization in City Administration:** A new anti-racism organization within Administration will be created to challenge racism within the City of Edmonton corporation, including challenging systemic racism, developing a culture of anti-racism, embedding anti-racist action into all processes within Administration, and acting as a collaborative partner with the Independent Anti-Racism Body to co-create a long term Anti-Racism Strategy and Plan for Edmonton.
3. **Core Operational and Capacity-Building Funding:** Core Operational and Capacity-Building Funding: In order to strengthen grassroots, BIPOC-led organizations and support them to be more effective with work that empowers BIPOC communities, influences the greater Edmonton culture, and is linked to long term goals in an Anti-Racism Strategy and Plan for Edmonton; the City will establish funding for core operations, capacity-building and other needs identified through collaborative decision making.

The Anti-Racism Advisory Committee also provided the following analysis on the suggested three elements by situating the recommendations within the contemporary environment:

“In addition to needing a sustainable, equitable and resourced body to continue the work started by the Anti-Racism Advisory Committee, the landscape of racism in Edmonton has changed dramatically since the Bylaw to create ARAC was first enacted in 2019. Edmontonians have been in a global pandemic that has presented greater risks and worse outcomes for BIPOC people. Black Lives Matter and Black, Indigenous and Trans Lives Matter protests and demonstrations took place, effectively resulting in Council creating a Task Force on Community Safety and Well-Being. Edmonton

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witnessed Tiki-Torch protests and a rise in White Nationalist activity. The attacks against visibly Muslim African women have continued, with news of another attack breaking as BIPOC communities draft this report. Also as BIPOC communities draft this report, the Freedom Convoy protests in Ottawa and Alberta with overtly racist behavior exasperates Canadians and terrifies BIPOC communities, all while more unmarked graves are found in Residential School sites in BC.”

In addition to this proposed municipal strategy, alignments to provincial and federal government anti-racism efforts must be considered. The three main initiatives of the strategy address key structural needs to adequately focus and resource anti-racism planning and implementation. However advocacy efforts must be coordinated through City Council, Administrative work units and communities as suggested in Attachment 6. Should the proposed Anti-Racism Strategy be approved, a number of upcoming meetings with other interested intergovernmental actors (such as Alberta Municipalities formally the AUMA and Federation of Canadian Municipalities) may be of interest for City Council to advocate with BIPOC communities to further anti-racism initiatives, such as addressing hate-based violence.

In summation, should the proposed Anti-Racism Strategy be approved, an implementation plan with clear timelines as well as a financing strategy will need to be developed for council to approve.

The Anti-Racism Advisory Committee and Administration suggests the following timelines:

February 14, 2022, Immediate action recommended:

- The Community and Public Services Committee recommends approval of the Strategy to City Council on February 22, 2022.
- City Council approves the Strategy and direct resources to support an independent anti-racism team made up of members of ARAC, BIPOC communities, BIPOC youth and required experts to work in equitable conditions towards the Anti-Racism Strategy Implementation Report, the Safety For All Implementation Report and the establishment of the Independent Anti-Racism Body.

Summer 2022, Supplementary Budget Meeting:

- Council approves the Implementation Report and associated budget and enacts the Independent Anti-Racism Body.

Fall 2022, Budget Discussions

- The Independent Anti-Racism Body returns reports to Council to inform budget discussions.

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Budget/Financial Implications

The strategy proposes a number of actions where the costing has not been fully calculated. As anti-racism work is iterative, the current resources to advance the transformative shifts as suggested in the proposed strategy are not available using existing program budgets.

Implementation of the Anti-Racism strategy (as outlined in Attachment 5) will require one-time funding of \$2 million to begin. Administration recommends that the strategy be funded from the Edmonton Police Services funds held within Financial Strategies.

Prior to consideration of the recommendation in this report, the balance of ongoing Edmonton Police Services funds available within Financial Strategies in 2022 is \$14.4 million, and \$18.7 million starting in 2023.

Current allocated funding for anti-racism grants includes \$300,000 annually plus additional one-time funding in 2022 of \$1.174 million.

Legal Implications

The strategy proposes actions that will require further legal analysis should the strategy be adopted.

COMMUNITY INSIGHT

Community insights were obtained through the following methods, stakeholder meetings and research.

Stakeholder Meetings

- Administration hosted a series of “thought leaders” sessions with BIPOC Leaders, Agency/Not-for-Profit leaders, community activists, academic leaders and Indigenous Knowledge Keepers to bring input and insights into the strategy. This represented about 16 individuals. The themes from the discussions are summarized in Attachment 7 and align to the proposed strategy.
- The City of Edmonton’s Anti-Racism Advisory Committee hosted numerous independent BIPOC community meetings in groups and one-to-one to identify action ideas, build and critically strengthen ideas, facilitate involvement at all levels of decision making and input into the Strategy, and to finally participate in report writing. This represented numerous meetings with approximately 60 individuals. Following ARAC’s anti-racist culture and processes, attention was focused on including and collaborating specifically with the most marginalized in BIPOC communities, especially Indigenous Peoples and BIPOC 2SLGBTQ+, youth, and Muslim women. We understand that the thinking that comes from the most marginalized in a society more often benefits all members of the society, while the thinking that comes from the more privileged in society can unintentionally neglect the needs of others.

Research

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- A Canadian municipal scan was conducted to explore what anti-racism initiatives, policies and actions have been taken commensurate to the direction and intent of the motion by Edmonton City Council.

GBA+

Due to time and resource constraints in the preparation of the proposed Anti-Racism Strategy, a comprehensive formalized GBA+ analysis was not able to be conducted. However, through the community insights obtained, a number of GBA+ factors were taken into consideration to ensure perspectives such as race, gender, age, immigration/migration status, socio-economic status, and other important nuances were considered through an intersectional lens. Should the proposed Anti-Racism Strategy be adopted and advanced into further action planning and implementation, a fulsome GBA+ analysis will be conducted.

RISK ASSESSMENT

Risk Category	Risk Description	Likelihood	Impact	Risk Score (with current mitigations)	Current Mitigations	Potential Future Mitigations
Risks if the recommendation is approved.						
None						
Risks if the recommendation is not approved.						
Public Sphere	Racialized community loses faith in Administration and City Council	5 - Almost certain	3 - Major	15 - High	N/A	Continue to manage current efforts through the Anti-Racism Advisory Committee.
Governance	Inaugural City Council Motion seen as a failure, a reflection on the cohesion of this new Council.	5 - Almost certain	3 - Major	15 - High	N/A	Relationships are managed through the Anti-Racism Advisory Committee.

ATTACHMENTS

1. Context of Report from the perspective of the Anti-Racism Advisory Committee with BIPOC Youth and members of the BIPOC Community
2. Brief History of Racism In Alberta
3. Glossary of Key Terminology
4. Municipal Scan of Canadian Cities
5. Anti-Racism Strategy
6. Intergovernmental Levers: Supporting Future Anti-Racism and Anti-Violence Advocacy Efforts
7. Thought Leaders Comments

Context of Report from the perspective of the Anti-Racism Advisory Committee with BIPOC Youth and members of the BIPOC Community

Mayor Amarjeet Sohi's inaugural motion is in response to the continuous incidents of hate based violence occurring against BIPOC communities and acknowledges that Edmontonians are ready for their city to take action against racism. The issue that specifically focused the minds of Edmontonians has been the frequent and terrifying attacks against Black Muslim women in our city. The motion was unanimously supported by Council, and it's helpful to notice the events that paved the road for a new political climate to emerge where comprehensive and impactful antiracist strategic action can now be considered. These events include the video capture of the murder of George Floyd by police in the United States of America during a pandemic when the greater society was already anxious and uncomfortable. This brought unwavering global attention to the grassroots Black Lives Matter movement. Furthermore, the consistent work of Indigenous communities to hold non-Indigenous people accountable in Truth and Reconciliation and to fight to demonstrate evidence for what they had been saying for decades and were not being heard on – that their children were taken and murdered by the government and institutions under the guise of 'education', and that unmarked graves are now being evidenced at Residential School sites.

The motion asked for a strategy with actionable items because the Mayor knew – as the Anti-Racism Advisory Committee (ARAC) and BIPOC communities know – that Indigenous, Black and People of Colour communities have spoken enough about what our experiences are and what we think needs to happen. We have asked enough if the instruments of our systems will listen, believe and enact change. The time to listen is complete, and the time for strategic action has arrived. The motion asked for 'collaborative decision making' between Administration and the Anti-Racism Advisory Committee and BIPOC communities. The previous City Council also recognized that collaborative decision making with the people most excluded and negatively impacted by decisions is required and not optional for anti-racist change to take place.

The aim for this work was to return an Anti-racism Strategy report to City Council in 100 days (and this presentation is close to that timeline). While the time was short, it seemed possible to complete this task given the commitment for action expressed by both City Administration and the Anti-Racism Advisory Committee. The City Manager's Office took responsibility for Administration's side of this work, supporting the various business units, and proactively aiming to do things differently than had been done before. ARAC had already developed deep relationships with those most marginalized and impacted within BIPOC communities, embodies significant expertise in grassroots anti-racism, operates a

culture and process of acting in anti-racist ways, and is able to bring these strengths to the process through its position by the motion as a collaborative partner.

When ARAC speaks of anti-racism, this includes all intersections of oppression including and not limited to gender, heterosexism and transphobia, ableism, age, religious expression, etc. It is the vision of the Anti-Racism Advisory Committee to actually reduce racist ideologies and racist behaviours among Edmontonians, and to facilitate Edmonton to evolve into a city that is anti-racist in its systems, processes, programs and culture. In this way, ARAC's vision is that Edmonton comes to be known as Canada's leading anti-racist city.

Nevertheless, succeeding in bringing forward this Anti-Racism Strategy turned out to be extraordinarily difficult, and at times felt impossible, given the significant barriers built into the administrative system. When systems are built from colonial ways of thinking and acting, cultures and processes are formed which continue those perspectives. This is how systemic racism forms and exists, and this happens even when the individuals within that system desire and intend to function differently.

This tension between anti-racist ways and colonial ways is further exacerbated by a number of factors. First, city administration operates a well used system and is able to begin action and continue action at a pace. In contrast, ARAC operates a limited-capacity, volunteer system and takes time to begin action. When city administrative processes start first and drive action at a pace that ARAC struggles to participate in, and when that action comes from colonial thinking and processes, ARAC and BIPOC community members experience stress, overwhelm and discouragement about participation and effectively impacting the outcome. Second, city administrative processes function in a well-resourced environment while the ARAC and BIPOC community members function in an under-resourced environment. Examples include administrative salaried staff working on this project as part of their daytime workload with access to benefits, supports, supervision and teams. In contrast, the Anti-Racism Advisory Committee, BIPOC youth and BIPOC community members work as volunteers around additional commitments and stressors, without compensation and a support work structure. While remuneration for volunteers is envisioned, it does not acknowledge the quality or amount of work required from this collaborative partner. Third, city administration is the gate-keeper of city council process information and the flow of resources, which further compounds inequity. Finally, this work is ordinarily completed solely by city administration, and ARAC and BIPOC communities are collaborative partner in this case to bring the Anti-Racist lens and access by marginalized and excluded peoples to the decision making process. In this way, ARAC is embodying the Anti-Racist oversight and accountability in the project. When one partner is the holder of accountability, and also lacks the resources to equitably participate and is made up

of those directly impacted by the outcomes of the work, the emotional labour provided is notable.

One example of this systemic struggle occurred during the report writing phase of this project. Never before has an outside party been included in the process of writing a report from administration for city council. In keeping with traditional practice, city administration began drafting the report and aimed not to include members of ARAC or BIPOC communities in its process or review. At the same time, administration requested a photo from the Chair of the Anti-Racism Advisory Committee and a Message from the Chair to be inserted into the report, even while ARAC was being denied an opportunity to review its content. Had the Chair of ARAC not resisted this, such actions could have irrevocably damaged the relationships in BIPOC communities ARAC had fostered since its inception. These issues were finally resolved through advocacy by ARAC. When members of ARAC, the BIPOC community and BIPOC youth finally saw a draft, it was clear that while the agreed 3 recommendations remained intact, there was a discrepancy between how administration and ARAC, BIPOC youth and BIPOC communities understood the focus, audience, rationale and implementation of those recommendations, as well as the overall outcome desired from council at this stage with this report. It became difficult for members of ARAC, BIPOC youth and BIPOC communities to comment on this draft, and through a collaborative community process, it was decided by this partner to write a new draft for administration to consider, especially one that framed the report as a clear strategy with outcomes to achieve and which linked the 3 recommendations to mechanisms to achieve those outcomes. ARAC's report writing process included collaboration with 16 individuals from ARAC, youth council, and BIPOC communities including Indigenous people, 2SLGBTQ+, Black people, Asian people, Muslims and women. Furthermore, because of processes within city administration that provide time for review and comment by city executive leadership, the time for ARAC and our partners to review the report was constantly framed as not existing and with a sense of urgency. In the first instance, we were given only 36 hours to review the original draft and return comments. Through advocacy and resistance, ARAC carved out more time for BIPOC youth and community members to reasonably carry out this work. However, the conditions remained consistently stressful and pressurized.

It is important to note that, as difficult as the process has been, there was good will and good intention on all sides. While struggling to function outside of their traditional processes, members of city administration did aim to facilitate the feedback they were receiving from ARAC, and supported the outlining of the experience here to help foster an understanding of how systemic racism functions. Anyone who has experienced some baseline anti-racism education has learned that this perpetuation is not personal, and may not even be conscious. It is not a failing of individuals. Rather, the systems, policies and procedures are inherently designed

to function in this way. Furthermore, the above is a snapshot of the immediate experience on this project. Members of ARAC, BIPOC youth and BIPOC communities appreciate and respect the work that is done by the various Branches, as well as all BIPOC staff within city administration. We honour the achievements and successes they have gained while working within the administrative system and processes. Thus, it is helpful to understand that systemic processes and outcomes occur regardless of the identities, intentions and desires of staff.

Finally, these difficulties did help members of ARAC and BIPOC communities remember that there are some key critical actions needed in an Anti-Racism Strategy for Edmonton in order to counter systematic racism. These elements underpin the 3 recommendations brought forward in this strategy. The ideas are not new, but reflect the best thought in anti-racism over decades and resonate with ideas expressed by Indigenous Elders. They amplify and strengthen the efforts brought forward previously by many members of BIPOC communities in Edmonton, and support the work by previous city council and many in administration.

Without these foundational elements, Edmonton's efforts against racism will continue to be disjointed, limited in their impact and even tokenized. These foundational elements allow collaborative decision making to become possible and new processes to exist that are anti-oppressive. They allow those most excluded and negatively impacted in our society to become equitable partners in bringing forward solutions, especially our BIPOC 2SLGBTQ+, disabled, youth, women and seniors. They provide the structure needed to address hate-based violence, deliver the best supports for communities experiencing hate and violence, champion anti-racist and anti-violence initiatives to the provincial and federal governments to secure resources and support, advocate for legislative tools and work with partners to support and amplify anti-racist initiatives and responses.

Brief History of Racism In Alberta

In Canada racism has been shaped by processes of colonization/dispossession and immigration. Due to late settlement compared to Eastern and Central provinces and an economic emphasis on natural resources, Western Canada (and specifically Alberta) has experienced these processes in ways both similar to, and unique from the rest of the country. Today, the province's demographics, economics, and understandings of identity have been produced by institutionalized and individualized racism, woven through policies and discourse, as well as anti-racist resistance.

Aileen Moreton Robinson, writing in the context of Australia but nevertheless relevant to our setting, explains that a possessive logic of white patriarchal sovereignty discursively and ideologically naturalizes the nation as a white possession (2004). In other words, white people stake primary claim to both land and nation in Canada by naturalizing geography as having been discovered and developed by European settlers when neither is in fact true (Razack, 2002).

Policy seeking to address historical racism in Alberta should consider structural and individual racism within this context. An example of racism tied to the production of a white national identity in and of itself, Black history has been largely erased from settlement narratives in Alberta (Thompson, 2021).

Regardless, Black people have participated in Western Canadian settlement since the 1800s, arriving as both enslaved people with French colonizers (Madibbo, 2021), and as settlers themselves (Wang, 2021). Many African Americans travelled from the Southern United States, escaping Jim Crow laws and motivated by Canada's Dominion Lands Act (1872), which offered cheap homesteads to Western settlers in order to facilitate the dispossession of Indigenous people from traditional territories (Wang, 2021). One example of this is Amber Valley, a town settled by Black settlers who travelled from the United states in the early 1900s (Wang, 2021).

Following early Western settlement, anti-Black racism and eugenics discourse in the early 1900s led to federal legislation preventing further immigration of Black people into Alberta (Madibbo, 2021). The prevention of racialized immigration into Canada did not only target Black people. From the late 1800s to early 1900s Canada's Immigration Act underwent numerous amendments aimed at restricting immigration from Asia and explicitly seeking to maintain Canada as a "white man's country" (Guo & Wong, 2018, p. 26 [quoting Mackenzie King(1908)]). Immigration from many countries was denied from 1908-1947 by the Continuous Journey Regulation, which prevented migrants from arriving in Canada by ship if the ship had to stop in a port on route, effectively barring

migration from South Asia. Because of this, Alberta did not experience large-scale migration from South Asia until the middle of the century.

In addition to anti-Black racism and historical erasure, Alberta has long housed anti-Asian racism. These sentiments grew and spread from British Columbia, since Chinese and Japanese immigrants began arriving in the province in the late 1800s, and early 1900s respectively (Palmer, 1980). Interestingly, anti-Asian racism did not target different groups in homogenous ways. While Alberta was a space of extreme discrimination against Chinese Canadians during the Great Depression and showed greater acceptance of Japanese Canadians at the time, this pattern was reversed during World War II (Palmer, 1980). During WWII, many Japanese Canadians from BC were interned and forced to work on sugar beet plantations in Alberta and other provinces (Marsh, 2012). Following Japanese internment, Alberta's sugar beet industry later relied on coerced labour from Indigenous people through the 1950s and 60s (Laliberte & Satzewich, 1999).

Throughout the 1900s Asian immigration acted as a political lightning rod in the province and country across party lines (Palmer, 1980). Labour organizations in both BC and Alberta showed deep hostility to Asian workers (Palmer, 1980). Post War movements in Alberta sought the disenfranchisement of Asian Canadians, their segregation to Lethbridge and Calgary, and specifically targeted Chinese Canadians through boycotts and calls for taxes on Chinese-owned laundries and a ban on Chinese employers from hiring white women (Palmer, 1980).

While Alberta experienced the impacts of immigration policy that overtly sought the production of a white European Canada, so too did it see simultaneous effects of policies aimed at the dispossession and assimilation of Indigenous people. During the 1900s there were 25 residential schools operating across the province, many located around Edmonton (Grant, 2021). In 1928 the Alberta government passed the Sexual Sterilization Act and created the Eugenics Board which especially targeted people with disabilities and Indigenous people with forced sterilization until the 1970s (Dack, 2020). Anti-Indigenous racism became institutionalized in Alberta and across Canada resulting in inequitable access to services, and disproportionate vulnerability to violence, especially for those with intersecting marginalization along axes of gender and sexuality (Simpson 2016; Razack, 2000; National Inquiry into Missing and Murdered Indigenous Women and Girls, 2019).

Colonial and immigration policies grounded in racism facilitated a rise in hate groups across Canada. Western Canada has long been home to white supremacist sentiment. In the 1930s Alberta saw overt Ku Klux Klan activity (Bartley, 2020). In 1931, the Ku Klux Klan campaigned for Edmonton mayoral candidate Daniel Knott, who, once elected, granted them permission to hold a

rally and burn crosses in what is now considered Northlands (Phillips, 2016). Though Ku Klux Klan activity and explicit support for the group eventually faded, white supremacist sentiment persisted for decades following, and perhaps remains among many Albertans today. This discourse ran deep and was evidenced by Western sugar advertising that played on racist stereotypes of Black workers into the late 1950s (Belisle, 2021).

During the 1940s, immigration policy began shifting away from overtly racist exclusions. Following this, Black immigrants resumed arrival in Alberta. However, once here, many faced systemic and individual hostility. For example, though many immigrants claimed Francophone identity, arriving from countries that had been colonized by France, few were able to access Francophone rights afforded their white peers (Madibbo, 2021). Additionally, during the 1940s-1960s, Canadian farm labour was reliant on Caribbean workers who had no rights to stay in Canada and faced precarious working conditions, including the threat of constant deportation (Satzewich, 1988).

Historical attempts to reconcile competing goals of ensuring adequate labour supplies while producing and promoting a white national identity have recently evolved. Processes of globalization and neoliberalism have increased the interconnectedness and international mobility of both capital and labour, leading to an increase in both racialized temporary foreign labour, and populist anti-migrant discourse in Canada. Though the Caribbean farm labour program ended, more recent manifestations of Canada's foreign labour reliance, such as the Temporary Foreign Worker Program, continue to exploit racialized temporary workers across industries in Alberta through their differential exclusion as second-class citizens who do not hold full rights in Canada (Foster & Barnetson, 2015b; Könönen, 2018).

In addition to temporary worker precarity, many racialized immigrants face the issue of deskilling when their credentials are not recognized in Canada and Alberta, which is a form of legislated racism. Of note, in the 1960s, Alberta saw a shortage of teaching labour and began recruiting teachers from Jamaica to fill the gap (Kelly & Cui, 2007). Once in Alberta, teachers' experiences in the profession were shaped by processes of racialization and deskilling. However, though they were made to pursue further education at Canadian universities, teachers were permitted to work in the meantime, demonstrating that Alberta of the 1960s may have in some ways been better in recognizing immigrants' skills and education than the province is now.

Historical and ongoing racism in the province is especially relevant to city policy development today due to increased targeting of Asian Canadians, exacerbated due to the COVID-19 pandemic, and increases in anti-Muslim and anti-Black

violence, especially against women wearing hijabs. Hate crimes against Asian-canadians have increased significantly in major Canadian cities since last year. Racism against Black people has continued in Alberta and across Canada, and reports show Black people experienced the highest rates of police-reported hate crimes in Canada in 2019 (Madibbo, 2021). Anti-Indigenous racism is also persistent in the Province and the city. While incidents of hate crimes have been reported against Black muslim women, many incidents that target Indigenous peoples go largely unreported although they are also on the rise, mostly due to mistrust of the enforcement bodies and the system (Bench, 2021). Edmonton should enact policies to address both systemic discrimination and individual hate crimes including harassment and assault.

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Glossary of Key Terminology

Race

'Race' or 'races' are recognized as a social construct and "do not exist in any scientifically meaningful sense" (Solomos, 1993 p.8). The significant recognition of 'race' in the construct of modern society is mainly owed to the impact of colonialism, colonial learning, and colonial implementations. The propaganda of racism has been used to fuel and promote the ideology of 'whiteness' and the push for 'whiteness' as supreme and every other 'race' as weak and inferior. This learning of 'white supremacy' in the construct of race has been learned through colonial influence, and the highjacking and elimination of other knowledge (African, Indigenous, Asian). Smith (2012, p.119) posits that "the production of knowledge, new knowledge and transformed 'old' knowledge, ideas about the nature of knowledge and the validity of specific forms of knowledge, became as much commodities of colonial exploitation as other natural resources."

Racism/White Supremacy

Solomos (1993, p.9) defines racism in the broad sense as a 'tool' used to "cover [the] ideologies and social processes which discriminate against others on the basis of their putatively different racial membership." Racism is described as a belief or behavior based on the notion that 'race' is the basis of human characteristics and practices and that racial differences produce inherent superiorities or inferiorities in particular races (Merriam-Webster Dictionary, 2013). Racism is further recognized as a discriminatory act that expands and creates the spaces for social injustice, inequality, exclusion, and numerous other disparities concerning resources, identities, and knowledge (MacKinnon, 2004; Heldke & O'Connor, 2004; National Collaborating Centre for Aboriginal Health, 2014). The idea of race and racism are rooted in Euro-colonial practices and doctination.

The colonialism to racism pipeline is primarily rooted in eurocentrism, which is explored in Arturo Escobar's work "Worlds of Knowledges Otherwise." Escobar (2007, p.184) declares that "[e]urocentricism as a regime of knowledge is confusion between abstract universality and the concrete world hegemony derived from Europe's position as the center." Europe's position as center is rooted in racism and 'othering.' Awatere (1984, p. 35) further retorts that because "the white occupiers [] won [the colonial war]," they have been able to "[create] the whole past and have taken and given the illusion of absolute truth." Racialization of minority groups has predominantly influenced employment policy, welfare provision, local government, policing, housing, and youth

provision in modern society needs to be recognized and taken into account (Solomos, 1993, p.7).

Racism is the practice of discrimination against groups of people based on the belief that there are superior and inferior inherent physical traits (skin color, hair type) and that these traits determine people's position in society, and their access to resources. Furthermore, racism is expressed through both individual and group practices. Racism practiced at both individual-level and 'group-level is rooted in the belief that 'race' as a discriminatory tool is a scientific and biological fact, when indeed it is not. Individual racism is demonstrated in both formal and informal settings through acts of verbal and physical abuse, microaggression based on misguided learnt behavior about power and superiority. Systemic racism, which takes place in more formal settings, is typically exercised through the laws, procedures and policies of institutions, governments, businesses and schools. Racism can be interpersonal, internalized, institutional and structural (sometimes used synonymously with systemic).

Systemic Racism

Systemic racism references the persistent disadvantages faced by racial minorities because of the racist and discriminatory procedures and policies established and enforced by structures such as private institutions and state organizations. Acknowledging racism as a dynamic element illustrates how racial categorization can continuously and inconspicuously mold itself into any societal structure.

The significant influence of racial measures in social, legal, and political discourse, framings, and documentation demonstrates that "racism is not a static phenomenon" (Solomos, 1993, p.9). Feagin (2013, p.xii) further acknowledges that the "truth about systemic racism in this society is not easy to communicate to many," and the work of confronting racism consists of thoroughly interrogating policy procedures, legal and political rulings in their positioning of catering to non-whiteness. Ladson-Billings and Tate (1995) examines the pervasive role of racism in societal structures and systems and offers solutions that are needed to address and prevent further irreparable damages to society. There are countries whose policies are mainly "based on property rights rather than human rights, and [this] intersection of race and property creates an analytical tool for understanding inequity."

Systemic racism is recognized as "more than a matter of racial prejudice and individual bigotry" but rather a "broad range of white-racist dimensions: race ideology, attitudes, emotions, habits, actions, and institutions of whites in this society" (Feagin, 2013 p. 2). Systemic racism is a well-oiled discrimination

machine and that is the “material, social and ideological reality” of non-whites in the global North (Feagin, 2013).

Intersectionality

The intersection of race and inequity is theorized through the work of Kimberle Crenshaw (1991). The theory of intersectionality addresses and seeks to remedy the negative classification of people on the concepts of race, gender, sexuality, and other ethno-cultural practices. The theory of intersectionality is rooted in Black Feminism and Critical Race Theory and is viewed as “a method and a disposition, a heuristic and analytic tool” (Carbado, Crenshaw, Mays, & Tomlinson, 2013, p.303).

Intersectionality is about identifying and understanding how individuals or groups of people experience acts of discrimination and marginalization centred on the combination of their race, gender, sexuality, class, nationality, age, religious practices and disability. These acts of discrimination are typically violent, reductive and demonstrated both overtly and covertly. The theory of intersectionality signals that people are being excluded not just on account of their skin color, but on the basis of their gender, their sexual orientation, disability, and more.

Crenshaw (1991, p.1241/2) explains that racializing and promoting the agenda of white supremacy hinges on the conflation, reduction, and erasure of people of color. Crenshaw’s exploration of the intersection of race and gender highlights how the obstructive unification of these identifications shapes the “structural, political and representational aspects of violence against women of color” (p.1244). Theorizing racism from the perspective of intersectionality allows for the understanding that identity politics is not a discourse rooted in vanity or surface sentiments, but rather lay the foundation to see identity politics as “vestiges of bias or domination-that is, as intrinsically negative frameworks in which social power works to exclude or marginalize those who are different” (Crenshaw, 1991, p. 1241/1242).

The entry point of intersectionality was framed around the discrimination and injustice met out to Black women in the area of legal scholarship but has since mobilized and extended itself into various disciplines and international spaces. “Intersectionality has moved internationally both as a means to frame dynamics that have been historically distinct within other domestic spheres and also as a way to contest material and political realities that are, by some measures, part of global and transhistorical relations of power (Carbado, Crenshaw, Mays, & Tomlinson, 2013, p.303).

Anti-Racism

Anti-racism theory began as a familiar term in educational spaces but is interpreted and practiced in numerous ways and through various actions centered on the “unlearning of ‘the logic’ of race” (Carrim 2016; Gillborn 2006; Rodman, 2020; Delgado, 1988). The rise of anti-racism rhetoric regained mainstream popularity during the aftermath of George Floyd’s and Breonna Taylor’s brutal killings by police personnel in the United States in the summer of 2020. While the anti-racist movement arose mainly as a critique of the nature of the state’s structural and system practices in its treatment of non-whiteness, and “a critique of liberal multiculturalism” (Gillborn, 2006, p.2), it has augmented itself into a more vocal and activist, and pragmatic focused movement. Ibram X Kendi, in a 2020 interview, provided a declarative stance on what anti-racism activism consists of currently, “it is not enough to simply be not racist.” You have to be against racism and demonstrate such through daily practices. To say you are anti-racist today is recognizing the move from passively engaging with the topic of ‘racism’ and actively demonstrating the support of change for equity in the treatment of people of color.

Anti-racism activism signifies how we can collectively contest dominant constructions of ourselves and [society] in ways that pierce the ‘logic’ of learned discrimination so that we can give full recognition to everyone’s humanity in all of our complexities and wonder (Carrim, 2016, p.247). Theorizing anti-racism is “not inherently healing, liberatory or revolutionary. It [will] fulfill this function only when we ask it to do so and direct our theorizing towards this end” (hooks, 1994, p.61).

Anti-racism explicitly acknowledges and confronts racial and discriminatory practices, ideals and policies as we collectively seek to move away from inequity at both the structural and interpersonal levels. Furthermore, anti-racism is about identifying and implementing actions that need to be taken to challenge the system, and confront the racist policies and practices to bring about change and equity for racialized groups. Anti-racism is also understood to be “the active process of identifying and eliminating racism by changing systems, organizational structures, policies and practices and attitudes, so that power is redistributed and shared equitably” (attributed to NAC International Perspectives: Women and Global Solidarity).

White Privilege

Peggy McIntosh (1989, p.1-2) recognizes white privilege as an “invisible package of unearned assets which white people “can count on cashing in each day, but are ‘meant’ to remain oblivious” to. White privilege exists as “both a legacy and a cause of racism” (Collins, 2018; McIntosh, 1989). Denying the origins and historic of white privilege does not absolve it of being rooted in racial bias.

White privilege has been promoted through inequitable systems such as 'redlining' and segregation acts and policies carried out through the Jim Crow era. White privilege can then be summarized as the socio-economic and material benefits and assurances provided for white people that are denied to other groups of people mainly based on the color of their skin.

Settler Colonialism

Settler Colonialism confronts the idea of post-colonialism in the sense that it highlights how 'whiteness' still enacts ongoing and structural violence in the pursuit of land and land ownership (Macoun & Strakosch, 2013). The locality of settler colonialism in our current lived experiences reminds us that "decolonization is not a metaphor" but action needed to be taken to ensure equity for indigenous people and their access and retention of land (Tuck & Yang, 2012).

Additionally, in the discussion on settler colonialism it must be noted that the ontological framing of land is different for the Indigenous people and the settlers. Indigenous people's relationship with land is not about possession and economic gain, the land is their spirit, their guides, their teachers, their nourishment and their birthright. Settlers view the land as something to possess and own, monetary gain, their commodified property (Bhandar, 2015; Ruru, 2010).

Settler colonialism is rooted in violent dispossession and possession. Settler Colonialism references a distinct type of colonialism that focuses on replacing and eliminating Indigenous populations' access to land by asserting sovereignty and power through occupancy and ownership while displacing the original indigenous occupiers. Wolfe (2006, p.387) suggests that acts of settler colonialism are "inherently eliminatory but not invariably genocidal." Settler colonialism differs from other forms of colonialism as it more so concentrates on permanent land occupancy, perpetual overt and covert elimination of indigenous populations, and it maintains false narratives and structures of settler belonging and ownership.

Islamophobia

Islamophobia refers to the violent fearmongering and discrimination against Muslim people because of their Islamic religious practices, and their cultural identity. Islamophobia is a term also used to describe "ideological distinctions between the civilized and uncivilized, Arab savage and Christian modern subject, citizen and colonial subject – citizens and indigenes – that fixed racial and political boundaries" (Azeez, 2019; Traverso, 2019).

Islamophobia is both structural and interpersonal suggesting that people who identify as Muslim and associate with the religion of Islam are treated as inherently violent extremists who perpetuate acts of terrorism against non-Islamic groups. Islamophobia can also read as “the perpetuation of anti-Muslim anxieties,” and as “manifest forms of anti-Muslim hatred found within and beyond contemporary public cultures” (Azeez, 2019, p.725). Islamophobia has also been “reworked to support xenophobic responses to migrations of Muslim working classes from former French colonies into French urban centres” (Azeez, 2019, p.725; Silverstein, 2004).

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Municipal Scan of Canadian Cities

Vancouver, British Columbia	
Who	
Racial and Ethno-Cultural Equity Advisory Committee	
Governance Strategy/Policy/Plan/Goal	
<p>Advise Council on enhancing access and inclusion for Vancouver's diverse cultural communities to fully participate in City services and civic life:</p> <ul style="list-style-type: none"> • Provides input to City Council and staff about issues of concern; • Considers any matters which may be referred to the committee by Council or staff; • May take positions on policy initiatives from other levels of government within the mandate of the committee • Reviews and advises Council and staff on the development, implementation and assessment of City policies and services related to strengthening ethno-cultural engagement, addressing racism and racial inequities and promoting racial justice and equity in the City; • Supports and advises on cultural celebrations and events in the City; • Works with Council and staff to identify and research issues, and advocate on behalf of residents to remove barriers to City services and enhance participation in civic life for racial minorities communities; and • Meaningfully engages with Council, staff, residents and other organizations as appropriate to advance Racial and Ethno-Cultural Equity in the City. 	
Current State	
<p>June 8, 2020: The City of Vancouver Racial and Ethno-Cultural Equity Advisory Committee calls for race-based health data collection in British Columbia.</p> <p>Committee to discuss work plan at Nov 25, 2021 meeting</p>	
Budget/Resources	
Internal	
<p>Equity Office https://vancouver.ca/files/cov/equity-framework.pdf</p> <p>June 22, 2021: Equity Office tasked by Council to develop an internal equity framework that aligns and creates common understanding within all city Departments and adoption by the Vancouver Public Library, the Vancouver Police Board and the Board of Parks and Recreation.</p>	
External	

Calgary, Alberta

Who
Anti-Racism Action Committee formed October 2020
Governance Strategy/Policy/Plan/Goal
The Committee, oversee the development of a Administration, and community based anti-racism strategy external consultants will work with racialized communities to identify strategies to address racism within City programs and services and leverage work being done in communities.
Current State
Budget/Resources
Anti-Racism Capacity-Building Fund Up to \$600,000 from The City, United Way and Calgary Foundation was available to eligible non-profit organizations for one-time initiatives to strengthen their organizational effectiveness, increase their programs' impact, and address emerging issues and trends impacting Calgarians.
Internal
<p>The City of Calgary contracted Ernst & Young as external consultants to review and assess the internal organization through a racial equity lens. This work includes reviewing the City's internal practices, policies, and engaging with City leaders and employees to collect data and gain a baseline understanding racial equity readiness. The data gathering will establish a baseline of the organization's racial equity awareness, leadership's readiness to lead this work, and a current state view of racism within the organization. From June through to September 2021, the City will engage staff through a survey, one-on-one interviews, and focus group sessions for leaders, management, and staff. Employees will have an opportunity to inform a racial equity assessment based on their lived experiences and provide a richness of qualitative context to complement the quantitative data.</p> <p>Beyond evaluating the City's internal practices, policies, and services, other efforts are underway to move The City toward becoming an anti-racist organization.</p> <p>Examples include, but are not limited to, the following: Equity, Diversity and Inclusion Advisors for recruitment panels (e.g., General Managers, Green Line Board and other positions) Education and Development (Journey to Becoming Anti-Racist Leaders for ELT; various Departments, Business Units and Service Delivery Areas) Updated Webpage and employee resources Recruitment for HR Learning & Development Inclusive Language for job postings Lexicon of Language (ex: Glossary of Terms) Employee Resource Groups (e.g., co-facilitate anti-racism conversations) Knowledge Exchange with Calgary Police Service and Calgary Fire Department's Anti-Racism Working Group.</p>
External
The City has contracted Habitus Collective and ActionDignity as external consultants to work with the Anti-Racism Action Committee, community stakeholders and Administration Co-create community-based anti racism strategy.

This strategy will focus on the City's role in addressing systemic racism in Calgary and our community-based services. The consultants will be facilitating a targeted engagement process with certain persons, groups, and organizations to invite them to co-host events or participate in focus groups starting in May 2021.

Leveraging existing community connections, over 30 events and online focus groups will be hosted. Community validation of the collected information will form an integral component of ensuring that community voices are authentically represented.

Calgarians feedback gathered through the three days of public submissions in July 2020 and data gathered by the City and community partners on racism and discrimination will also be used to inform the strategy.

Winnipeg, Manitoba
Who
Governance Strategy/Policy/Plan/Goal
<ul style="list-style-type: none"> • The Anti-Racism Initiatives Report supported and approved by Council in July 2020. In July of 2020, Council directed the public service to build on the work being done as part of the Newcomer Welcome and Inclusion Policy, specifically asking for all City staff to be provided with training on anti-oppression, anti-racism, and cultural competency. The Public Service will also be launching a two-part Workplace Cultural Assessment to gain a better understanding about perceptions and attitudes of equality, equity, and inclusion in our workforce, by hearing directly from our employees. • The goal of the Equity, Diversity and Inclusion strategy is to have representative workforce through tangible programs, practices, and department specific initiatives aimed at increasing the number of people employed at the City that identify as Indigenous persons, racialized persons, female, persons with disabilities, newcomer, and LGBTQ2+
Current State
<ul style="list-style-type: none"> • Anti-Racism Week from March 21 to 27, 2021 • March 26: City Voices Discussion that featured City staff panelists from First Nations, Inuit, Metis Nation, Black, Racialized and Religious Minorities communities to share firsthand experiences of racism and what they envision a city without racism to look like. A community leader who is a human rights advocate moderated the event with support from facilitators who helped to guide breakout sessions. <p>This was intended to create a safe, supportive environment where the panelists could share their stories and City staff could engage in meaningful discussion</p>
Budget/Resources
<p>EDI Investment</p> <ul style="list-style-type: none"> • 2 additional permanent FTEs, 1 in 2022 for \$143,033 and 1 in 2023 for \$110,769 • Additional funding for non-salary expenditures

Attachment 4

(\$465,000 over 5 years) be referred to the 2022 and 2023 budget process
Internal
<p>The Human Rights Committee of Council concurred in the recommendation the Winnipeg Public Service an recommended to the Executive Policy Committee and Council:</p> <ol style="list-style-type: none"> 1. That the creation of an Equity Office within Corporate Human Resource Services with focus on hiring staff from diverse backgrounds and who self declare in one or more of the equity groups, be approved. 2. That the Equity, Diversity & Inclusion Policy and Strategy, attached as Appendix B, be approved. 3. That subject to the approval of funding and FTE's, that the City of Winnipeg hosted Anti-Racism training events, in collaboration with partners from First Nations, Metis, Inuit, Black, Racialized and Religious Minority groups. 4. That subject to the approval of funding and FTE's, that a new diversity dashboard reporting tool/report be created that encompasses the City's diversity report components as well as reporting on the effectiveness of the EDI Strategy and steps being taken to increase the diversity of the City's workforce. 5. That 2 additional permanent FTEs, 1 in 2022 for \$143,033 and 1 in 2023 for \$110,769, as well as additional funding for non-salary expenditures will be referred to the 2022 and 2023 budget process. 6. That the Proper Officers of the City be authorized to do all things necessary to implement the intent of the foregoing
External

Saskatoon, Saskatchewan
Who
Cultural Diversity and Race Relations Policy
Governance Strategy/Policy/Plan/Goal
Current State
Budget/Resources
Internal
The City of Saskatoon has an employment equity plan, monitored and approved by the Saskatchewan Human Rights Commission.

- The City of Saskatoon is an Employment Equity employer and commits itself to the development and promotion of policies and practices designed to eliminate discriminatory barriers in the workplace consistent with the Employment Equity Plan approved by the Saskatchewan Human Rights Commission.
- The City of Saskatoon will provide cross cultural and cultural sensitivity training throughout the Corporation, so that both management and other employees can work towards eliminating systemic barriers and creating a welcoming and supportive environment for employees of all cultural backgrounds. As well, there is a need for education for potential employees on hiring processes, in order to assist them in accessing available jobs

External

The City of Saskatoon will review its methods of communication to ensure that information is provided in a variety of ways to make it easily accessible to our diverse population

- A facilitator to bring other agencies together to work jointly towards the outcomes
- A coordinator or clearing house for information sharing.

Strategy:

Cultural Awareness and Anti-Discrimination Education

- A granting agency through existing grant programs.

Toronto, Ontario

Who

City of Toronto Confronting Anti-Black Racism unit (CABR)

Governance Strategy/Policy/Plan/Goal

Organizers, advocates and leaders within Toronto's Black communities worked with City staff to advance the removal of systemic barriers for Black Torontonians, following directives from the City's Executive Committee.

Current State

Toronto Action Plan to confront Anti-black Racism approved by Council in December 2017
<https://www.toronto.ca/legdocs/mmis/2017/ex/bgrd/backgroundfile109127.pdf>

Budget/Resources

This year, the City will make the following investments in arts, heritage and creative industries to confront anti-Black racism:

- Support key Black heritage organizations through there-allocation of \$300,000 in funding.
- Commit \$300,000 to expand workforce development initiatives with key industry partners that accelerate the career pathways for Black youth in creative industries with a focus on screen-based industries, including management roles.
- Reallocate an additional \$300,000 to support the career development of Black professionals in arts and culture with a focus on connecting community-based training programs and post-secondary institutions with sustainable employment opportunities.

- Work with the Toronto Arts Council Opens in new window to identify \$300,000 in reallocated 2020 and ongoing funding to support the Black arts community with initiatives designed through consultation with the Black arts community.
- Ensure that City funding for arts heritage and cultural organizations is prioritized for organizations that reflect the diversity of this city in their leadership and operations, supports smaller and often newer organizations to increase their reach and impact, and addresses social and economic exclusion.

The City will make the following economic development investments to confront anti-Black racism:

- Provide \$250,000 over five years, or \$50,000 annually, to support the Digital Media Zone (DMZ) at Ryerson's Black Innovation Fellowship Opens in new window program supporting tech entrepreneurs.
- Develop a five-year community economic development plan for Black communities while continuing to support established initiatives such as those in Weston Mount Dennis, Golden Mile, Little Jamaica and East Downtown.

Internal

- Change at the City Year Three will prioritize increasing the number of staff trained, expanding the use of anti-Black racism analysis by City staff, and recruitment and talent strategy for Black staff, which is particularly important as the City focuses on building a workforce that reflects our city's diversity

External

Year Three will:

- prioritize building on recognition, justice and development for Black Torontonians through the City's declaration of the International Decade for People of African Descent, which recognizes that people of African descent represent a distinct group
 - will focus on supporting the development of alternatives to police response for mental health crisis calls, wellness checks and low-level disputes between community members.
- prioritize building Black community resilience through the Black Resilience Cluster and increased institutional investments in the "Black COVID-19 frontlines"

Ottawa, Ontario

Who

Anti-Racism Secretariat to address systemic racism in our community and within the City's workplaces and services.

Governance Strategy/Policy/Plan/Goal

The advisory table will be made up of anti-racism leaders from racialized communities who will provide subject matter expertise to the City's Anti-Racism Secretariat. The group's mandate is to collaborate to raise awareness about systemic and individual experiences of racism, encourage actions to effectively address racism and provide input into the City's Anti-Racism Strategy. The group will bring forward community perspectives on all aspects of

Attachment 4

racism, including the six priority areas the strategy will address: employment equity, housing, governance, economic development, health outcomes and youth development – all of which are within the City's jurisdiction.
Current State
The City is now accepting member applications for the new Anti-Racism Advisory Table, a group that will help inform the City's first Anti-Racism Strategy.
Budget/Resources
The City has invited non-profit organisations working in social development or intercultural relations to submit a project that promotes intercultural rapprochement and the fight against discrimination and racism. This call for projects has a budget of \$2 million. Successful projects may receive financial support of at least \$ 100,000.
Internal
External

Montreal, Quebec
Who
Office of the Commissioner for Racism and Systemic Discrimination was created in the wake of the report of the Office de consultation publique de Montréal (OCPM) of June 2020 which recognized the systemic nature of racism.
Governance Strategy/Policy/Plan/Goal
<p>Its team is made up of professionals with varied expertise and experience, including a resource specializing in racial profiling who works within the Police Department of the City of Montreal.</p> <ul style="list-style-type: none"> • Ensure that all of the City of Montreal's units take firm and concerted action to combat racism and discrimination. • Inform citizens and municipal employees of their rights and the recourse mechanisms available to them.
Current State
<p>Priority actions 2021</p> <ul style="list-style-type: none"> • Begin the work of the Office of the Commissioner for Combating Racism and Systemic Discrimination, in particular by hiring the various members of its staff. • Develop an action plan to unitstake firm and concerted action to combat racism and

discrimination.
Budget/Resources
Internal
<p>The City has drafted it's 2021-2023 Master Plan for Diversity, Equity and Inclusion (DIE) in employment. This new strategy, inspired by the intercultural and anti-racist approach recommended by the Intercultural Council of Montreal, is based on 3 interrelated priorities:</p> <ul style="list-style-type: none"> • Recognize and value diversity • Develop an inclusive culture • Strengthen communication and consultation links <p>The City intends to undertake the following actions, which constitute novelties and innovations:</p> <ul style="list-style-type: none"> • Implement an inclusive talent strategy that aims to accelerate access and diversification of management functions. • Implement an attraction strategy for the SPVM. • Deploy a training course in diversity, equity and inclusion. • Develop an integration path for new executives. • Form an advisory committee made up of staff members who have been made aware of diversity, equity and inclusion in the workplace. • Promote the diverse backgrounds of staff members. • Monitor systemic discrimination and integrate gender-differentiated and intersectional analysis.
External

Fredericton, New Brunswick
Who
<p>Newly formed Office of Community Inclusion</p> <ul style="list-style-type: none"> • In the fall of 2019, the Chief Administrative Officer (CAO) asked for the development of an Anti-Black Racism Working Group, supported by the African Nova Scotian Affairs
Governance Strategy/Policy/Plan/Goal
<p>Reach out to racialized communities and organizations who prioritize addressing systemic racism in order to get their input on how to form an Anti-Racism Task Force for Fredericton.</p>
Current State
<p>Input was being requested until Nov 3, 2021</p>

Budget/Resources
Internal
External

Halifax, Nova Scotia
Who
<ul style="list-style-type: none"> • In the fall of 2019, the Chief Administrative Officer (CAO) asked for the development of an Anti-Black Racism Working Group, supported by the African Nova Scotian Affairs Integration Office (ANSAIO), to identify recommendations to help create a safer and more inclusive workplace. • in 2020 an Anti-Black Racism Steering Committee was formed to develop and implement an action plan. • In June 2021, Regional Council approved the Anti-Black Racism Framework, which will guide the development of an Anti-Black Racism Strategy and Action Plan.
Governance Strategy/Policy/Plan/Goal
Framework for Anti-Black Racism Strategy and Action Plan Development
Current State
<ul style="list-style-type: none"> • Project Charter developed and endorsed by the CAO -November 2020 • ABR Steering Committee ABR Steering Committee consisting of
Budget/Resources
Internal
The municipality is advancing the adoption of internal and externally-focused anti-Black racism strategies and actions. Staff will also deliver on key priorities set out in the Diversity & Inclusion Framework – designed to assist the entire organization in our continued efforts to build a diverse and inclusive workforce and provide programs and services to our residents by using a diversity and inclusion lens.
External
In 2020 Regional Council adopted the African Nova Scotian Road to Economic Prosperity Action Plan that was informed by members of our African Nova Scotian communities who worked many months together with staff to create this significant blueprint for economic

and social development with and for our African Nova Scotian residents and communities.

Charlottetown, PEI (NB. Provincial Info)	
Who	Provincial anti-racism policy advisor, in the Executive Council Office will begin working with Island residents facing systemic discrimination to drive change in Prince Edward Island through the new Anti-Racism Table beginning September 20, 2021
Governance Strategy/Policy/Plan/Goal	
Current State	Islanders interested in effecting changes to the education, justice, health systems, or advancing legislation and policy related to employment opportunities, social or housing programs and services are encouraged to submit their application to the Anti-Racism Table through the Engage PEI process. The Province will be accepting applications through Engage PEI for membership to the Anti-Racism Table until September 10, 2021
Budget/Resources	
Internal	
External	

Anti-Racism Strategy

Summary of Recommendations

At the 12 January 2022 meeting of the Anti-Racism Advisory Committee, ARAC members, members of BIPOC communities, BIPOC youth and Administration worked together to agree by consensus the following three recommendations to provide the structural change needed to effectively address racism and hate-based violence in Edmonton:

1. Independent Anti-Racism Body:

A community-driven, equitably resourced body that is independent from other city bodies (such as City of Edmonton Administration, Edmonton Police Service, school boards and districts, etc.) will be established to oversee anti-racism in Edmonton and have the ability to stimulate reflection on and challenge systemic racism at all levels in Edmonton. This body will be accountable to BIPOC communities, especially the most marginalized and diverse members within these communities. This Body is the structure that will allow collaborative decision making to become fully possible, and will participate in co-creating a long term Anti-Racism Strategy and Plan for Edmonton. The Independent Anti-Racism Body will report directly to City Council.

The Independent Anti-Racism Body will safe-guard an anti-racist structure and processes through its values, culture, mandate, goals, processes and personnel. It will stand outside of existing colonial structures in Edmonton, provide anti-racism oversight for Administration and act as an anti-racism accountability partner for other bodies. This Body will hold the trust and uplift the voices of BIPOC communities, especially the most marginalized members of these communities. It will fulfill a number of functions based including receiving reporting on incidences of racism, collecting and analyzing data that can underpin anti-racist responses, providing anti-racist communication and general education in Edmonton, facilitate healing for communities affected by hate and the lateral violence that can occur because of these experiences, and make recommendations for policies, programs and funding. In this way, it will act to:

1. Address hate-based violence and facilitate supports for communities experiencing hate and violence;
2. Be a partner in championing anti-racist and anti-violence initiatives to the provincial and federal governments to secure resources and support, and advocating for legislative tools; and
3. Work with partners to support and amplify anti-racist initiatives and responses.

2. High Level Anti-Racism Organization in City Administration:

A new anti-racism organization within Administration will be created to challenge racism within the City of Edmonton corporation, including challenging systemic racism, developing a culture of anti-racism, embedding anti-racist action into all processes within Administration, and acting as a collaborative partner with the Independent Anti-Racism Body to co-create a long term Anti-Racism Strategy Plan for Edmonton. This Organization will receive support and oversight from the Independent Anti-Racism Body, which will act as an accountability partner for Administration on anti-racism. In this way, it will act to:

1. Create new conditions in which incidents of hate based violence reduce;
2. Be a partner in championing anti-racist and anti-violence initiatives to the provincial and federal governments to secure resources and support, and advocating for legislative tools; and
3. Be a partner in influencing other partners to support and amplify anti-racist initiatives and responses.

3. Core Operational and Capacity-Building Funding:

In order to strengthen grassroots, BIPOC-led organizations and support them to be more effective with work that empowers BIPOC communities, influences the greater Edmonton culture, and is linked to long term goals in an Anti-Racism Strategy and Plan for Edmonton; the City will establish funding for core operations, capacity-building and other needs identified through collaborative decision making. This funding will be created in addition to increasing investment and the scope of the existing anti-racism project grant funding program and the current once-off funds allocated this year to address issues of safety. Grassroots, BIPOC-led organizations will have a close relationship of support and accountability with the Independent Anti-Racism Body. This funding will act to:

1. Address hate-based violence and supports for communities experiencing hate and violence; and
2. Be a partner in championing anti-racist and anti-violence initiatives to the provincial and federal governments to secure resources and support, and advocating for legislative tools.

Anti-Racism Strategy Discussion and Analysis

This strategy is a direct result of the Mayor's Inaugural Motion on 1 November 2021, which states:

"That Administration work with the Anti-Racism Advisory Committee and the BIPOC community, in a collaborative decision-making way, to develop actionable items and a comprehensive strategy on anti-racism that:

1. Address hate-based violence and supports for communities experiencing hate and violence;
2. Champion anti-racist and anti-violence initiatives to the provincial and federal governments to secure resources and support, and advocating for legislative tools; and
3. Work with partners to support and amplify anti-racist initiatives and responses."

The desired outcomes of this strategy are as follows:

1. Reducing, with the intent of eliminating, incidents of racism and hate-based violence in Edmonton.
2. Disempowering the causes of such violence, i.e. to disempower racism in all its forms, and empowering anti-racism into as many layers as possible in the city.
3. Stimulating healing and facilitating recovery for communities affected by hate based violence.
4. Increasing a sense of solidarity and connectedness between all diversities and communities in Edmonton.
5. Increasing knowledge of anti-racism in Edmonton and among our partners.
6. Advocating for and achieving anti-racist and anti-violence initiatives, resources and legislative tools from the provincial and federal governments.
7. Influencing all organizations and partners in Edmonton to create anti-racism strategies and policies, and connect them to the city's long term Anti-Racism Strategy and Plan.

These outcomes contribute in the long term to creating a safer, more equitable Edmonton for all its citizens.

Some short term and more immediate objectives of these recommendations are as follows:

- Creating a long term Anti-Racism Strategy and Plan to address hate based violence and recommend supports for communities experiencing hate and violence.
- Taking actions to shift current reactive processes to a proactive, collective anti-racism response grounded in the long-term strategy that brings

meaningful change. A proactive, collective response includes supports and resources for anti-racism education and awareness.

- Creating a clear interaction model between the Independent Anti-Racism Body, City Council, BIPOC communities and partners, which forms the basis of collaborative decision making as well as a collective response and interaction with Provincial and Federal levels of Government for advocacy for resources, supports and legislative tools.
- Further building out a sustainable model for grant funding. The inaugural grant program was created and administered by ARAC in a volunteer capacity, with support from City administration, in order to innovate an anti-racism grant process. The amount of time and resources required does not make it sustainable or conducive to be run solely by volunteers. The anti-racist process of the inaugural grant program must be preserved and strengthened for this and additional anti-racism funding programs, while putting in place an equity model to resource the labour involved.

The above long term outcomes can be measured and achieved through the following mechanisms:

1. Fostering deep, trusting relationships with members of Indigenous, Black and People of Colour communities, especially in relation to the most excluded and marginalized within these communities. This includes and is not exclusive to 2SLGBTQ+ people, visibly Muslim women, youth, disabled people and seniors. Uplifting the voices and ideas from these communities.
2. Recording, tracking and monitoring incidents of racism and hate, and reporting trends.
3. Collecting, analyzing and reporting on disaggregated data related to racism and intersectional themes.
4. Providing effective and accessible anti-racism education and communication, to Edmontonians generally and BIPOC communities specifically.
5. Fostering healing from trauma and the causes of violence and lateral violence.
6. Strengthening grassroots, BIPOC-led organizations through funding and structural support.
7. Making recommendations on anti-racism to City Council and other partners.
8. Creating accountability structures for anti-racism in Edmonton.

The 3 recommendations provide the structure needed to enact these mechanisms and achieve the outcomes.

1. Independent Anti-Racism Body

Currently, no structure exists which can effectively enact the mechanisms and achieve the outcomes outlined above. While the Anti-Racism Advisory Committee is currently relied on to attempt to achieve some of these outcomes, it is not sustainable to have such responsibilities lie with a volunteer citizens committee in our system. Relegating it to a fringe, volunteer structure sends a clear message that the system does not value anti-racism work or intend for it to have any real impact. Furthermore, as racism and oppression are the root causes of all hate based violence, Administration and other arms-length bodies which are built from and function within current colonial systemic processes repeatedly fail to deliver effective outcomes from the above mechanisms. Therefore, a community-driven, equitably resourced Independent Anti-Racism Body is needed to stand outside of systemic racism, continue the work begun by ARAC and go further to hold Edmonton accountable to creating real anti-racist change and addressing hate based violence. The idea for this Body originally came from BIPOC communities. This Body would report directly to City Council and at the same time maintain a close working relationship to the Administrative structure that continues to advance on anti-racism efforts within the City Corporate structure.

Since its formation, the Anti-Racism Advisory Committee has succeeded in 'moving the needle' on systemic racism in the City. Some members of ARAC have spent many hours speaking to City Council and educating Councillors on anti-racist principles, resulting in Council making more effective decisions for members of BIPOC communities. ARAC achieved the right to review our own mandate through an anti-racist lens, succeeded in gaining remuneration for all volunteers of civic agencies and committees, and created and made recommendations for a new anti-racism grant program. ARAC also successfully challenged the *Safety For All Implementation Report* on the grounds that it was systemically racist and excluded people impacted by it. One impact of ARAC's work was that two motions were made by Council which directed for 'collaborative decision making' with BIPOC communities – a concept that had never been approached in the city before and which leads on anti-racism in many places. ARAC achieved these successes only because some of our members acted outside of the scope of the expected volunteer commitment to an advisory committee, and dedicated countless hours to advocacy and relationship building in order to achieve some critical changes in the city.

ARAC is a citizen volunteer advisory committee that requires the commitment of one monthly meeting and one monthly subcommittee meeting. Systemic change in a city cannot be affected within this structure. Other city advisory committees have watched ARAC's successes and approached us to learn how we achieve them. They have been discouraged when they understood how far outside the expected commitment of these committee structures some ARAC members have worked, and how many hours must be invested to achieve this.

Most importantly, BIPOC communities have also watched the successes ARAC has achieved in the short 1.5 years of its existence, and have been inspired by them. They have watched ARAC build relationships across diverse communities and across areas of lateral violence. They have watched ARAC preserve an anti-racist culture and process, listen deeply and act with dedication beyond the scope of a citizen's volunteer committee, in order to achieve systemic change to improve their lives. Many skilled, grassroots BIPOC people do not apply to ARAC because they recognize that the way it has been conceived and located in the city structures functions to tokenize it. While they are grateful for ARAC's work and successes, they are aware that it is inequitable and not sustainable.

It is BIPOC communities that brought forward the recommendation of an equitably resourced, Independent Anti-Racism body. This Body will represent an evolution from the Anti-Racism Advisory Committee, preserving its anti-racist culture and processes, expanding its mandate, resourcing it to higher standard benchmarks to equivalent areas within the city structure, and preventing the tokenization and exploitation of BIPOC people.

The Independent Body will work in relationship with Indigenous communities, the Indigenous Relations Office in the city to ensure alignment with the principles of the existing Indigenous Framework, including the TRC Calls to Action and the MMIWG and 2SLGBTQIA+ Calls for Justice. All anti-racism efforts in Edmonton must be embedded in a central commitment to standing against racism against Indigenous Peoples. It must act in solidarity with and let itself be led by Indigenous Peoples and their communities. The Anti-Racism Advisory Committee has already taken steps towards outreach to Indigenous knowledge keepers, ensuring that the principle of Indigenous leadership is considered within our processes. We hope to build positive relationships with Indigenous communities to ensure they participate in the founding of the Independent Anti-Racism Body. Colonization in Canada has systematically separated Indigenous Peoples through legal and other instruments from other people, including Black People and People of Colour. Furthermore, Black People and People of Colour have come to this land through the mechanisms of the colonizers. Black People, in particular, are subjected to anti-Black racism which is rooted in the mechanisms of slavery and must be made visible and challenged at every turn. An understanding of these experiences and interactions is necessary to creating a Body founded in anti-racism.

In addition to needing a sustainable, equitable and resourced body to continue the work started by the Anti-Racism Advisory Committee, the landscape of racism in Edmonton has changed dramatically since the Bylaw to create ARAC was first enacted in 2019. Racism is a continuing and escalating concern. Edmontonians have been in a global pandemic that has presented greater risks and worse outcomes for BIPOC people. Black Lives Matter and Black, Indigenous and Trans Lives Matter

protests and demonstrations took place, effectively resulting in Council creating a Task Force on Community Safety and Well-Being. Edmonton witnessed Tiki Torch protests and a rise in White Nationalist activity. The attacks against visibly Muslim African women have continued, with news of another attack breaking as BIPOC communities draft this report. Also as BIPOC communities draft this report, the “Freedom Convoy” protest in Ottawa and Alberta with overtly racist behaviour exasperates Canadians and terrifies BIPOC communities, all while more unmarked graves are found in Residential School sites in BC. Furthermore, in Edmonton, symbols of hate lay bare including racist graffiti desecrating the city’s largest mosque and Nazi symbols being used to terrify Jewish and 2SLGBTQ+ communities. Black youth continue to be attacked in Edmonton schools, and a hate motivated attack against a Black Edmonton man occurs as this report is being drafted, all amidst a breakdown in trust existing between BIPOC communities and police. Indigenous and Black people are disproportionately incarcerated, and Indigenous and 2SLGBTQ+ people are disproportionately homeless. Indigenous women, girls and two-spirit people continue to be targeted and go missing and are being murdered at rates that can only be described as an emergency, and yet little government action is taking place to even acknowledge this, let alone address it. Politicians, including from political leaders, continue to make racist comments. Anti-Asian hate continues, especially in the climate of Covid. Steps continue to be taken to bring in an elementary curriculum that is widely recognized as racist and opposed by many parties, including many teachers. Muslim communities in Edmonton – especially young girls and women – are impacted by the message of exclusion communicated by Bill 21 in Québec and the lack of action against this by our Federal government. Finally, the effects of the Climate Emergency are being felt everywhere, including in Edmonton, and the connection between racism and the climate emergency cannot be ignored. Edmonton stands at a moment to decide if the city will collectively respond.

The above represents only a snapshot of issues of racism arising in very recent times in Edmonton, and is limited to only overtly racist incidents. However, the myriad experiences of racism that reduce the health and quality of life for Edmontonians occurs in many more daily, subtle and insidious experiences. Even within the City of Edmonton corporation, there are several hundred complaints of experiences of racism in the workplace and it is agreed that this figure is highly under-reported. We can assume that members of BIPOC communities experience racism in workplaces throughout Edmonton.

Racism is an escalating issue and without a well-resourced, proactive response, the situation will continue to get worse. Speaking on CBC Radio’s ‘The Current’ on 31 January 2022 about the “Freedom Convoy” in Ottawa, Max Fawcett, lead columnist for the National Observer, was asked how this protest was being received in Alberta and said, “I think they are probably received more favourably than in most other

parts of the country. I think anyone who's been paying attention, and especially paying attention out here in Alberta in the last couple years, kind of saw this coming. ...It seemed pretty clear something bad was going to happen." Given the steady escalation of racism, we can expect more 'bad things to happen' if we do not dedicate funds and resources now to a proactive, collective action strategy through an Independent Anti-Racism Body.

Finally, City Council has recently made decisions to restructure funding, including reassessing proportions allocated to the police budget and proportions allocated to addressing root causes of social exclusion. Work needs to happen immediately on returning an Implementation Report for the Safety For All report to Council, and Council has moved that this happen in a collaborative decision making way with the Anti-Racism Advisory Committee and BIPOC stakeholders. Without change now, members of ARAC and BIPOC communities will be forced to labour in the same systemic processes that are currently in place. Furthermore, in other jurisdictions where police budgets were perceived to be 'cut' in favour of restructuring, the police response has been to relook at their priorities and assess where there is potential duplication of enforcement functions, and have public social media exchanges which indicates that serious crimes are occurring in the downtown core, on public transit, and public safety is at risk. In Edmonton, we have already seen tensions grow between police, Peace Officers and Transit. The media has carried several stories recently about a lack of safety on transit. The Alberta Hate Crimes Committee has observed that the online comments to media stories regarding transit safety disproportionately blame BIPOC communities for the problem. Council's recent changes to loitering bylaws are also being blamed, and ARAC worked to bring an anti-racist lens to the impact of those bylaws on marginalized BIPOC people when the change was being considered. An ability to provide an anti-racism lens which connects all these factors is needed.

In an environment where Council is making new decisions with an anti-racism lens, Council needs an Independent Anti-Racism Body that is equitably resourced to provide deeper oversight from a perspective that stands outside systemic racism and is connected to a long term Anti-Racist Strategy and Plan for the city. Council further needs this Body to build relationships with all partners, disseminate accessible anti-racism education to the public, and be empowered to provide communications that are grounded in evidence and counter narratives which perpetuate racism.

There are several practical actions that have been brought forward already by BIPOC communities. These include that Council ratify the last remaining years in the UN Decade for African Descent, create an independent anti-racism phone number similar to or within 311, provide supports for BIPOC communities to heal from generational and current trauma, provide supports for BIPOC communities to heal

from the forces of lateral violence and internal community struggles that exclude members within these communities, develop communication plans to assist Edmontonians to bond together against racism, take action to be in solidarity with Truth and Reconciliation and the UN Declaration of the Rights of Indigenous Peoples, and more. These actions need to be connected into a cohesive, long term, strategy and plan. The formation of this strategy and plan needs to centre the most excluded in BIPOC communities – including 2SLGBTQ+ members, youth, women, disabled members and seniors – and be driven by BIPOC communities through the Independent Anti-Racism Body.

Although there is no precedent for such a body in Canada, this structure has existed in European Union member countries for decades and has been recognized as a critical pillar of effective anti-racism. The current and inaugural Chair of ARAC – while living in Europe, participating in grassroots anti-racism activities and delivering anti-racism consulting and education – was part of a national delegation of member states to the European Union to establish the European Network Against Racism in 1998. At that time, it was well established that a properly resourced, independent anti-racism body in each jurisdiction, that held the trust of BIPOC communities and could uplift this voice while simultaneously advising the government on policy and programs, was best practice for succeeding in reducing incidents of racism and hate in that jurisdiction.

As demonstrated in Attachment #1, one of the barriers to achieving impactful anti-racist outcomes is disempowering experiences with administrative processes which foster discouragement and a lack of trust by members of BIPOC communities for the City of Edmonton corporation and partners. Edmonton is now at a pivotal moment to decide if there is the political will and ability to change the landscape of our municipal system or if we will continue with the same systems and processes that are perpetuating racism.

It is crucial that the Independent Antiracism Body is equitably funded, driven by grassroots BIPOC community experiences and empowered to make statements against racism and recommendations for anti-racism. Through ARAC's numerous meetings with BIPOC community members and our BIPOC community event, this idea has been critically considered and strengthened based on an evaluation of strengths, weakness, successes and failures achieved in other jurisdictions at other times. The critical factors needed for this Body to succeed in achieving the intended outcomes as outlined in this report include clearly establishing the anti-racist values, vision, mission, mandate, goals, structure, processes and funding; and hiring the right people to drive it. This idea has been well thought-out, and will be made even stronger in an upcoming Implementation Report.

The Independent Anti-Racism Body functions outside of established systems and can therefore effectively challenge systemic racism and function in an entirely anti-racist way. In this way, the Body will maintain the trust of BIPOC communities and deliver the most effective perspectives and recommendations.

All the mechanisms required to achieve the outcomes of this Strategy will be mandated to the Independent Anti-Racism Body:

1. Fostering deep, trusting relationships with members of Indigenous, Black and People of Colour communities, especially in relation to the most excluded and marginalized within these communities. These includes and are not exclusive to 2SLGBTQ+ community, visibly Muslim women, youth, disabled people and seniors. Uplifting the voices and ideas from these communities.
2. Recording, tracking and monitoring incidents of racism and hate, and reporting trends. Research has demonstrated that trust is required for reporting to take place. As the Independent Anti-Racism Body is the structure that will nurture and deepen trust with BIPOC communities, reporting should be received here. This body will also produce reports on trends in racism and anti-racism for City Council and the public.
3. Collecting, analyzing and reporting on disaggregated, intersectional data. As this body will receive reporting, produce reports and be a collaborative partner to other bodies, it is well positioned to advise on and facilitate the take up of such data collection by other partners.
4. Providing effective and accessible anti-racism education and communication to Edmontonians generally and BIPOC communities specifically.
5. Fostering healing from trauma and the causes of lateral violence.
6. Strengthening grassroots, BIPOC-led organizations through resources and structural support.
7. Making independent, anti-racist recommendations to City Council and other partners.
8. Creating accountability structures for anti-racism.

In order to be effective and achieve the goal as a collaborative decision-making partner with Administration, this Body will be funded at a higher standard to equivalent benchmark in the system. Community-driven members of BIPOC communities with experience of anti-racism, grassroots activism and volunteerism will be hired to serve in this body. It is imagined that there is still a place for a volunteer citizen's advisory committee, which will function as the governing board to this body. The Independent Body will act as a collaborative decision making partner to Administration and other city partners and organizations when needed, but function outside the system.

Other equity seeking advisory committees within the municipal structure can access support from the Independent Anti-Racism Body to further systemic change on issues they have identified, as once an anti-racism lens is applied, it is almost always noticed that the issue also impacts members of the BIPOC community. An example of this is the issue of safety and accessibility in vehicles for hire that the Women's Advocacy Voice of Edmonton (WAVE) have been trying to affect Council on for four years. The issue involves harassment and sexual harassment experienced on a daily basis by women and people with disabilities in taxis in Edmonton. Despite persistent efforts by WAVE, no discernible change in outcomes has been achieved on this issue. WAVE recently brought this to the attention of ARAC. The Anti-Racism Advisory Committee is aware that if White women and disabled people are experiencing sexual harassment in taxis, BIPOC women and disabled people will be experiencing greater frequencies and intensities of this harassment. WAVE is also aware that harassment in taxis is a link in the issue of Missing and Murdered Indigenous Women in our city. Furthermore, ARAC is aware that a significant number of taxi drivers are members of BIPOC communities. Thus, while a very experienced and long existing volunteer citizens advisory committee to City Council, WAVE, has not been able to 'move the needle' on this issue at all while working within the scope of their committee, despite four years of diligent work, an Independent Anti-Racism Body can champion this issue and achieve significant success quickly using the anti-racist processes that ARAC has already developed and carried out.

An effective plan to address inequities caused by racism allows considerable flexibility for innovation and trial and error. This is because most societies have never achieved anti-racist equity on most issues of concern (for example, opportunity, life expectancy, economic security), and the plan to get there remains unproven. Therefore, benchmarks that provide guidance must be included along the way to give the opportunity to pivot or stay the course.

Risks:

Since the formation of the Anti-Racism Advisory Committee in 2019, issues of racism are an on-going situation and have been escalating. Without an effective instrument in the form of this Independent Anti-Racism Body, the risk is greater violence and divisions within our communities.

Enacting this body represents genuine systemic change against racism, and no doubt those benefiting from power in the current system will feel threatened. It will be crucial for ARAC – with its relationships with BIPOC communities – and Council to be aligned and support each other in making this change. It is also critical that the

structure and funding of this body is developed to support its success. Every achievement of anti-racism generates greater harmony and stability within our city.

Without a sustainable, long term anti-racism strategy and plan, any efforts put forth by the current Council and Administration will not have continuity and longevity as governments and departments turnover. Furthermore, it is not fiscally responsible to spin up new projects and task forces to address long standing, deeply rooted issues that are continually being reinforced by existing, long standing structures.

2. High Level Anti-Racism Organization in City Administration

The City of Edmonton corporation is Edmonton's largest employer and its behaviour with racism and anti-racism with impacts a significant number of Edmontonians. Furthermore, BIPOC communities have noticed that trust with Administration cannot improve unless anti-racism is embedded into Administration's policies and systems. In order to do this, an empowered, high level anti-racism Organization is required. As demonstrated in Attachment #1, Administration's existing systems and processes are not currently capable of functioning in anti-racist ways. There are also currently hundreds of complaints of experiences of racism by employees in the system, and it is agreed that the real number of experiences is likely much higher than that.

City leaders need to support change in its systems and the experiences of its staff. Given that increasing diversity hiring and diversifying leadership are current goals of the city, attention to changing the organizational culture is much needed. Staff are not able to affect the system to function in anti-racist ways. Therefore, there is a need for the Independent Anti-Racism Body to function as an accountability partner, provide anti-racism oversight including advice on policies and recommendations, and be a collaborative partner in hiring decisions.

There is a need for an anti-racism policy for Council, and an updating of Council Codes of Conduct to consider issues of racism and lateral violence across communities. Administration and the Independent Anti-Racism Body will work as collaborative partners to support these updates for City Council.

Risks:

The mandate of this High-Level Anti-Racism Organization will be to reduce racism and increase anti-racism in the culture and processes of the city corporation. In the long-term, this should increase trust between the City Corporation and BIPOC communities. It will also reduce systemic racism in the experience of Edmontonians. With these commitments and actions, it is possible that the City of Edmonton corporation will become a model and leader for other institutions towards

embodying anti-racism. In order to succeed, it is crucial that the Independent Anti-Racism Body, reporting directly to City Council, will both oversee and hold Administration accountable for its actions and achievements.

The process to create change within a long-standing, bureaucratic organization will require professional resourcing regarding change management. Change impact assessments will need to be conducted and change plans developed for execution and accountability practices will need to be developed.

3. Operational and Capacity Building Funding

There is widespread agreement that the current Anti-Racism grant program is inadequate for responding to the present climate of racism. This budget was allocated in a time before it became possible for anti-racism to escalate to this degree. Furthermore, the first round of anti-racism project grants has demonstrated that when funding is delivered in such small quantities for one-off projects and is not connected with operational funding, such grant funding can actually weaken grassroots BIPOC community organizations. There is a need for greater investment into the program to provide operational and capacity building funding alongside larger projects funding. There may also be a need for some capital funding. Finally, anti-racism actions will be most effective when they are linked to a long term anti-racism strategy and plan for the city.

Risks:

If core and capacity building funding for grassroots, Indigenous, Black, and People of Colour organizations are not provided, these communities will continue to undergo marginalization, experience poverty, and demonstrate the social determinants of health associated with excluded peoples. Edmonton will continue to not fully benefit from the creativity, innovation, experience and perspectives of its diverse communities. Divisions between communities will continue to grow deeper, generational trauma will continue to be passed on and increased incidences of conflict can occur. Furthermore, without the empowerment of these communities, the forces that support perpetrator behaviours against these communities will increase.

The Independent Anti-Racism Body will have deep relationships with BIPOC communities, embody an anti-racist practice and have access to the data collected to understand racism in Edmonton. As such, it is the best structure to create and make recommendations for these funding programs.

Conclusion

We have never had a clearer opportunity in our history to challenge racism and hate based violence, and lay the foundations to heal our society. For the first time there is a political climate and public will to take advantage of the knowledge and

experience that exists to lead us on a path forward.

These three recommendations provide the means to support communities impacted by hate, disempower the causes of hate, and facilitate healing and bonding among Edmonton's communities. In this way, they will assist us to evolve as a whole into a city that is anti-racist in its culture, systems, processes and programs.

As racism in Edmonton is an on-going situation and incidents of hate have been escalating, it is unreasonable to rely on a volunteer citizen committee structure to lead anti-racism. Despite this, ARAC has achieved clear successes in 'moving the needle' against systemic racism in Edmonton. The existing structures, which have been built from colonial processes and can only perpetuate systemic racism, are unable to deliver outcomes that effectively address hate and the root causes of hate based violence. What is needed is a long-term and sustainable Anti-Racist Strategy and Plan to provide proactive, collective action.

Council is asked to accept this Anti-Racism Strategy Report, and consider resources for a team of members from the Anti-Racism Advisory Committee, BIPOC communities and BIPOC youth to bring forward a more detailed Implementation Report with an associated budget.

Intergovernmental Levers: Supporting Future Anti-Racism and Anti-Violence Advocacy Efforts

Issue

The City is committed to fostering a safe and respectful community that is inclusive of all, which requires a multi-faceted approach to address racism. Each order of government can play an essential role in making progress on the complex issues associated with racism within our community and society, through providing leadership, resources, and legislative tools. Developing and strengthening partnerships with other orders of government to ensure alignment and coordination has become even more urgent as growing rates in hate crimes and victimization occur within the local Indigenous, Black, Muslim, Asian, Jewish and other racialized communities.

Purpose

The following road map outlines an overarching approach and various advocacy levers that can help guide the advancement of any future anti-racism and anti-violence advocacy requirements as identified by the Anti-Racism Advisory Committee and the BIPOC community further to the Nov 1, 2021 Council motion:

That Administration work with the Anti-Racism Advisory Committee and the BIPOC community, in a collaborative decision making way, to develop actionable items and a comprehensive strategy on anti-racism that:

- 1. address hate based violence & supports for communities experiencing hate & violence;*
- 2. champion anti-racist and anti-violence initiatives to the provincial and federal governments to secure resources and support, and advocating for legislative tools; and*
- 3. work with partners to support and amplify anti-racist initiatives and responses*

Strategic Approach

To help advance the City's interests, one of the levers of change identified in the *City Plan* includes the need to support government partnerships and advocacy. To assist with these efforts, the following overarching strategic approach has been identified to align future anti-racism and anti-violence advocacy efforts to enhance outcomes with the City's federal and provincial counterparts by:

- leveraging all available advocacy and emerging government consultation channels (including monitoring newly proposed legislative/policy changes)
- strengthening issue advancement through ongoing relationship building
- incorporating a "whole team" approach to amplify advocacy efforts
 - Team Council: through City's elected officials and their offices
 - Team Admin: through City's public servants administrative levels
 - Team Community: through coalition building with other external allies (including the Edmonton Police Service/Edmonton Police Commission)
- strategically aligning initiatives and/or proposals with current government policy and programs in order to leverage existing funding, when possible
- ensuring requests are clearly conveyed to the most appropriate audience(s)
- sharing consistent messaging grounded in key facts to enhance awareness, while also identifying key champions that can echo key messages

General Key Messaging

The City remains committed to taking action to create a more welcoming and safe environment for all of our diverse residents. This includes addressing racism, preventing hate-based violence, and supporting immigrants, refugees and other newcomers to our community.

The need for action is even more urgent given concerning rates of victimization within our Indigenous, Black, Muslim, Asian and Jewish communities.

The City looks forward to working with our diverse partners and all orders of government to leverage our collective tools and support locally driven solutions to address these social issues that have significant individual, economic and societal costs.

Aligning Efforts with Federal and Provincial Directions

In communications with other orders of government, the City should “speak the government’s language” wherever possible by focusing on shared objectives and seeking areas of potential alignment in consideration of emerging positioning. The following extracts share some provincial and federal government priority interests:

Government of Canada

- Minister of Housing and Diversity and Inclusion Mandate Letter ([Dec 16, 2021](#))
 - *“As part of a renewed Anti-Racism Strategy, lead work across government to develop a National Action Plan on Combatting Hate, including actions on combatting hate crimes in Canada, training and tools for public safety agencies, and investments to support digital literacy, to prevent radicalization to violence and to protect vulnerable communities.”*
 - *“Continue to strengthen and support the important work of the Federal Anti-Racism Secretariat to ensure a whole-of-government approach in addressing systemic racism, including through increased resources.”*
 - *“Increase funding to multicultural community programs, recognizing their important role in supporting community organizations across the country as they fight racism.”*
 - *“Work with colleagues across government to continue building on the spirit of the United Nations International Decade for People of African Descent, by developing policies and projects that tackle discrimination and unconscious bias in public and private institutions, including anti-Black racism.”*
- Minister for Women and Gender Equality and Youth Mandate Letter ([Dec 16, 2021](#))
 - *“Move forward with the development of a 10-year National Action Plan to End Gender-Based Violence, begin negotiations with the provinces and territories within a year, and accelerate the establishment of a dedicated Secretariat.”*
 - *“Continue the work of the LGBTQ2 Secretariat in promoting LGBTQ2 equality at home and abroad, protecting LGBTQ2 rights and addressing discrimination against LGBTQ2 communities, building on the passage of Bill C-4, which criminalized conversion therapy.”*
 - *“Continue to sustain historic Government funding commitments to Canadian women’s organizations and equality-seeking groups, with a particular focus on Indigenous women, women with disabilities, members of the LGBTQ2 communities and newcomer, racialized and migrant women.”*

- Minister of Justice and Attorney General of Canada Mandate Letter ([Dec 16, 2021](#))
 - *Address systemic discrimination and the overrepresentation of Black and racialized Canadians and Indigenous Peoples in the criminal justice system and ensure all Canadians have access to fair and just treatment, including by:*
 - *With the support of the Minister of Crown-Indigenous Relations, continue to develop, in consultation and cooperation with provinces, territories and Indigenous partners, an Indigenous Justice Strategy; and*
 - *With the support of the Minister of Housing and Diversity and Inclusion, develop, in consultation and cooperation with provinces, territories and Black Canadians, a Black Canadians Justice Strategy.*
- Minister of Families, Children and Social Development Mandate Letter ([Dec 16, 2021](#))
 - *“Enhance the capacity & effectiveness of Black-led and Black-serving organizations through the continued implementation of the Supporting Black Canadian Communities Initiative.”*
- Minister of Crown-Indigenous Relations Mandate Letter ([Dec 16, 2021](#))
 - *“With the support of all relevant ministers, including the Minister for Women and Gender Equality and Youth and the Minister of Indigenous Services, work with First Nations, Inuit and Métis leadership, survivors, families and communities to address violence against Indigenous women, girls and 2SLGBTQQIA+ people by accelerating the implementation of the Federal Pathway to Address Missing and Murdered Indigenous Women, Girls and 2SLGBTQQIA+ People, and work with Indigenous partners, provinces and territories to support the implementation of the 2021 MMIWG and 2SLGBTQQIA+ National Action Plan.”*
- Minister of Indigenous Services Mandate Letter ([Dec 16, 2021](#))
 - *“To achieve equity, you will continue to collaborate with Indigenous partners—by working together to close socio-economic gaps and improve access to high-quality services.”*
 - *“In addition, you will continue to work with organizations that deliver services in urban settings for Indigenous populations that are responsive to needs.”*

Government of Alberta

- Ministry of Culture, Multiculturalism and Status of Women (2021-24 Business Plan)
 - *“Work with Indigenous communities and government partners to address the recommendations of the National Inquiry into Missing and Murdered Indigenous Women and Girls and the Truth and Reconciliation Commission.”*
 - *“Support multiculturalism, diversity and inclusion by developing programs and policies that promote a society in which Albertans feel their culture, heritage, language, sexual orientation and gender are valued, respected and supported.”*
 - *“Participate in initiatives to prevent gender-based violence and explore new opportunities to increase women’s, girls’ and LGBTQ2S+ participation in under-represented fields such as non-traditional trades, entrepreneurship and elected office.”*
 - *“Support the Alberta Anti-Racism Advisory Council to identify ways the Alberta government can combat racism and inspire Albertans to celebrate our diversity.”*
- Ministry of Indigenous Relations (2021-24 Business Plan)
 - *“Collaborate, as requested, with other provincial government ministries to provide advice and support for the development of policies, programs, and initiatives that reflect Indigenous perspectives and consideration.”*
- Ministry of Justice and Solicitor General (2021-24 Business Plan)

- *“Review the delivery of policing services in the province, including a feasibility study of a provincial police service, to ensure Albertans feel safe and confident in their communities.”*

Leveraging Advocacy Support through our Municipal Associations

To support the advancement of Edmonton’s interests, the City often supports joint advocacy opportunities through involvement with other municipal associations which provide important avenues to support collective action and advance shared interests.

Some of the key municipal associations which has City representation includes:

- Federation of Canadian Municipalities, which brings together nearly 2,000 municipalities of all sizes from across Canada.
- Big City Mayors Caucus, which is the Federation of Canadian Municipalities’ caucus of Mayors of the 22 largest Canadian municipalities.
- Big City Executive Partnership, which provides a forum for the City Managers from Canada’s six largest urban centres to discuss potential shared interests.
- Alberta Municipalities, which represents roughly 265 urban municipalities.

The following provides a high-level summary of some of the emerging advocacy efforts (beyond ongoing member opportunities to formally sponsor and vote on new annual resolutions that can set the direction for future FCM and AM advocacy efforts) and key discussion forums occurring through these municipal associations that cross over the intersecting issues of racism, discrimination, and preventing violence.

- The Federation of Canadian Municipalities has established the following two standing committees and forums to facilitate more detailed debate and provide the board with recommendations on priority policy and program issues:
 - [Anti Racism and Equity](#)
 - [Community Safety and Crime Prevention](#)
- Alberta Municipalities has identified the following two strategic initiatives for 2022 advancement through its Safe and Healthy Communities Committee discussions:
 - Policing and Justice - Advocating for improvements to and appropriate resourcing of the justice and policing systems, including:
 - Responding to Police Act amendments;
 - Responding to the potential establishment of a provincial police service;
 - Advocating for all Albertans to have equitable and timely access to justice-related programs and services.
 - Welcoming Inclusive Communities - Provide support to municipalities as they support the increasing diversity of Albertans and the settlement and integration of refugees. Implementing Alberta Municipalities’ Measuring Municipal Inclusion Grant. The two main programs that Alberta Municipalities will complete this year are: Community Readiness for

Newcomer Integration and Measuring Municipal Inclusion Grant agreement.

- Discussions through the Big City Executive Partnership (City Managers of six largest cities) are exploring areas the cities share in common on the broad topic of community safety and policing, racism, discrimination and violence. Potential collective advocacy has been identified towards the need for increased:
 - federal and provincial support and funding of the broader social ecosystem and community safety and wellbeing.
 - federal support and funding for alternative policing approaches and teams.
 - federal support, funding and legislative/policy changes to address violence in the cities, particularly gender-based violence and violence against indigenous peoples.
 - federal support, funding and legislative/policy changes to address racism and related hate crimes in municipal organizations and the greater community
 - federal funding and regulations/standards for measurement, data collection and reporting on police/law enforcement matters.

Targeting Key Government Officials with City Messaging

The following list identifies key government elected and administrative officials at both the federal and provincial levels where future advocacy could be directed, in conjunction with any other ongoing relationship building and joint advocacy efforts.

	Minister (elected official)	Deputy Minister (civil servant)
Federal Government Key Officials	The Right Honourable Justin Trudeau, Prime Minister of Canada The Honourable Ahmed Hussen, Minister of Housing and Diversity and Inclusion The Honourable Marci Ien, Minister for Women and Gender Equality The Honourable David Lametti, Minister of Justice and Attorney General The Honourable Karina Gould, Minister of Families, Children and Social Development The Honourable Marc Miller, Minister of Minister of Crown-Indigenous Relations The Honourable Patty Hajdu, Minister of Indigenous Services	Janice Charette, Interim Clerk of the Privy Council and Secretary to the Cabinet Michael Vandergrift, Deputy Minister of Intergovernmental Affairs, Privy Council Gina Wilson, Deputy Minister for Women and Gender Equality; and Senior Associate Deputy Minister of Diversity, Inclusion and Youth, Canadian Heritage François Daigle, Deputy Minister of Justice and Deputy Attorney General of Canada Jean-François Tremblay, Deputy Minister of Employment and Social Development Daniel Watson, Deputy Minister of Crown- Indigenous Relations and Northern Affairs Christiane Fox, Deputy Minister of Indigenous Services

Provincial Government Key Officials	<p>The Honourable Jason Kenney, Premier of Alberta</p> <p>The Honourable Whitney Issik, Associate Minister of Status of Women</p> <p>The Honourable Muhammad Yaseen, Associate Minister of Immigration and Multiculturalism</p> <p>The Honourable Rick Wilson, Minister of Indigenous Relations</p> <p>The Honourable Sonya Savage, *Acting Minister of Justice and Solicitor General</p> <p>The Honourable Ron Orr, Minister of Culture</p>	<p>Ray Gilmour, Deputy Minister and Secretary to Cabinet</p> <p>Heather Caltagirone, Deputy Minister of Culture and Status of Women</p> <p>Shawn McLeod, Deputy Minister of Labour and Immigration</p> <p>Donavon Young, Deputy Minister of Indigenous Relations</p> <p>Frank Bosscha, Deputy Minister of Justice and Solicitor General</p>
Other Key Government Advisory Bodies	<p>Federal Anti-Racism Secretariat (Peter Flegel, Executive Director) The Federal Anti-Racism Secretariat (within the Department of Canadian Heritage) leads a whole-of-government approach to working with federal organizations, other orders of government and civil society, to identify systemic racial barriers and gaps, develop new initiatives, and consider the impacts of new and existing policies, services and programs on racialized, Indigenous and religious minority communities. This work builds towards longer-term actions against racism and discrimination in Canada.</p> <p>LGBTQ2 Secretariat (Fernand Comeau, Executive Director) The LGBTQ2 Secretariat (within the federal Department of Women and Gender Equality and Youth) works with public servants in different departments and agencies to help them apply inclusive approaches that consider the potential impacts of policies, programs and laws on Canadians of all sexual orientations, gender identities and gender expressions.</p> <p>Gender-Based Violence Secretariat Anticipated to be established in 2022 through the federal government.</p> <p>Alberta Anti-Racism Advisory Council (Co-chairs: Mohamad Awada & China Ogbonna) The Alberta Anti-Racism Advisory Council is comprised of up to 24 provincially appointed people who represent Alberta's diverse communities, and continues to meet to provide advice to the provincial Minister on ways to:</p> <ul style="list-style-type: none"> • remove systemic barriers to accessing government programs and services • remove language barriers in accessing information • educate and inform Albertans to encourage acceptance and prevent future racism • connect with law enforcement agencies and communities to raise awareness and assist local collaboration across Alberta • identify strategies and actions to combat racism <p>In 2021, the Alberta Advisory Council submitted a report outlining 48 recommendations on how to address racism, and promote more inclusive and accepting communities.</p>	

Intergovernmental Advocacy Levers

There are a variety of intergovernmental forums and advocacy channels that can be leveraged to help advance Edmonton's interests for seeking any additional resources, support, and new legislative tools from other orders of government. Opportunities range from sending formal written correspondence to various government officials, to providing detailed written submissions through available

government consultation sessions, to hosting face-to-face/virtual meetings at both the elected and senior administration levels.

In conducting this advocacy work, it will be important to emphasize data and figures regarding the current issues Edmonton is facing, in order to make the case for any urgent support that is required.

- Support direct engagement with key government officials and advisory bodies:
 - send correspondence
 - meet with key representatives
 - participate in formal government consultations
- Explore other coalition building and joint advocacy opportunities:
 - through the City's participation with various Municipal Associations
 - advance resolution(s) through Federation of Canadian Municipalities, and support ongoing discussions through applicable committees
 - advance resolution(s) through Alberta Municipalities, and support ongoing discussions through applicable committees
 - with other municipalities across Canada
 - through ongoing discussions with the Big City Executive Partnership
 - by engaging a roster of community leaders to help advance shared interests
 - by bringing together other stakeholders from the non-profit sector, community groups, businesses, post secondary, Indigenous leaders, etc.

Upcoming Dates of Interest

On February 24, 2022, the Government of Alberta will be tabling their 2022-23 budget, and the Government of Canada is expected to release its budget in the following months, which will guide their future investments and legislative agenda. It will be important for the City to review any new government policy directions and funding commitments related to addressing racism and violence that could influence future City advocacy efforts in these areas.

The following list identifies some upcoming dates when key municipal associations will be launching their advocacy efforts to influence future provincial and federal government priority setting in advance of their 2023-24 budgets. The City would have an opportunity to bring forward and vote on any member sponsored resolutions through these sessions.

- June 2022 - Federation of Canadian Municipalities Annual Resolutions
- Fall 2022 - Alberta Municipalities Association Annual Resolutions
- Nov 2022 - Federation of Canadian Municipalities Advocacy Days
- Spring 2023 - Government of Alberta Budget Release
- Spring 2023 - Government of Canada Budget Release

Between March 1 and May 31, 2023, the next provincial general election will be occurring in Alberta. Leading up to this election, may provide opportunities to potentially influence policy platforms across the political spectrum and positively position City interests. The City can advance advocacy priorities with all parties and candidates during the provincial election campaign period by taking a non-partisan approach.

Thought Leaders Comments

Thought Leaders Conversation #1

Tuesday November 30, 2021

6:00-8:00 p.m.

Main themes:

Disaggregated race-based data

- "Prioritizing that [race-based data] needs to be at the forefront of this work"
- "The ways in which we are racialized are diverse"
- "So that we have an intimate understanding of our communities and we can channel resources in the right direction"

Interconnectedness of systems (health system, housing system, justice system)

Intersectionality

The importance of resources

- "I would never reduce racism to resources, but resources are a key to how structural racism operates"
- "Quite often you find that a lot of the momentum that is created around this [anti-racism] is a lot of unpaid labour"

Understanding of race and racism that is both historically and locally specific

- "The mechanisms by which racism operates might differ from place to place. More sustainable and applicable solutions need local understanding."
- "That local history is oral. We need to honour the people who have it. And honour all the people we get knowledge from."

Sensitivity to Indigenous experiences

- "I think the Truth and Reconciliation Commission gives us lots of insight into how we can do anti-racism work. It calls on more than just the provincial and federal government, but municipal and other systems."
- Lived experience of Indigenous peoples is different from other racialized people
- "Indigenous people's involvement in anti-racism strategies has been unclear even in the history of the City of Edmonton. Who gives license? I don't think it comes from council. [...] We haven't done that well; if we can go slower and

say how this strategy is different from and parallel to different Indigenous strategies”

Trauma

- “Our whole society is suffering base-line trauma from experiences of racism and inequity. And also from coming from people who perpetuate racism and inequity. There’s a trauma there. Much more widespread access to mental health services is key in stopping hate-based violence. And healing from hate-based violence”
- Experiences of intergenerational trauma

Policing and its role in racialization

Specific Ideas/Feedback:

- Adoption of the international decade of people of African descent by the City of Edmonton
 - “We want the City to adopt, understand, and put resources towards the international decade of people of African descent”
 - *Idea supported by multiple participants*
 - Having a framework to work towards can be helpful in tackling a specific issue
 - “I love the idea of adopting the decade. But tying it to some concrete policy that’s in the sphere of control of the City of Edmonton. Example: the 15 dollar minimum wage is anti-racist and it cannot be undone by other parties”
- A dedicated phone number in Edmonton or Alberta specifically for antiracism/reporting experiences of racism
 - Note: Research shows that more empowered groups report, and the least empowered groups never report
 - An opportunity to collect data for a more accurate picture of what’s happening
 - Need to create a system where there is more trust
 - Reporting shouldn’t be linked to whether something will be considered a crime or not
 - Have the line operated by trained Black, Indigenous, and People of Color respondents
 - *Idea supported by multiple participants*
- Include capacity building in the strategy

- Support from the city “doesn’t just look like dollars and cents, but listening to them and giving them advice on how they run their community groups or businesses”
- Capacity building should be more than “nuts and bolts operational”. Include “resources for helping with trauma healing, lateral violence, etc. Pieces that affect a group’s ability to grow and be influential”.
- A commitment to education
 - “a commitment to providing our students (particularly k-12)_ an unvarnished account of Canadian history, particularly that comes to race and racism”
 - “a requirement that all teachers engage in anti-racism journeys”
- A commitment to funding groups, initiatives etc. that centre anti-racism
 - “There should be a priority placed on creating some sort of funding strategy for groups/initiatives in this area”
 - “The City should fund baseline admin dollars to every social change NFP to counter the not-for-profit industrial complex that makes BIMPoC orgs struggle for survival and does not give us the adequate means to have thought leadership in our organizations or to engage in communities that would truly make us accountable.”
- Anti-racism knowledge/skills should be competencies in leadership positions
 - Through FCSS the city has a sphere of influence to exert – it should no longer be optional for leadership of social change organizations to have anti-racism competencies
 - “Make it not okay to make anti-racism optional. Good work is anti-racist work. Especially for social change organizations”
 - *Idea supported by multiple participants*
 - These should also be competencies for teachers and school administration
- An actionable strategy with accountability and review timelines
 - “In order for a strategy to be meaningful, it needs to have timelines and dollar amounts to it”
 - “We should be brave enough to name who will be responsible”
- A Gay Straight Aliances -like model in schools for anti-racism
 - Gay Straight Aliances have been impactful and successful in building empathy.
 - A need to address who is perpetuating race-based violence
 - Expand the way our society thinks of mental health
- Defunding the police / “Community justice, restorative justice – want to put that on the table alongside the other idea.”
 - *Idea supported by multiple participants*

Other:

- Expression of hope for the term 'collaborative decision making' in the motion
- "Turning the lens up" – "people like Kim Tallbear focuses on turning the lens up. Not just focusing on the deficits, but what's happening for the ppl at the top who are creating the conditions that drive those outcomes."
- Act while we have a mayor and council that's onside
 - Connect these things at the policy level so that they cannot be undone
 - *Expressed by multiple participants*
- "I would like the terminology at the city to change from GBA+ to anti-racism and intersectionality. Adding the plus is not enough."
- "Racism is an economic structure. That is why it was created, that is how it has been mobilized, and that is why racialized communities are at the bottom of the economic structure."

Thought Leaders Conversation #2

Thursday December 2, 2021

5:30-7:30p.m.

Main themes:

Intersectionality

- Ensure that we distill whatever strategies we come up with in these various dimensions [race, gender etc] in order to be able to address them
- "If we're doing any consultation, we need to be mindful of the intersections in our consultations to make sure people feel included."

Role of police

- "We need to address anti-black anti-Indigenous hate. It does exist in our city police. "
- "The whole institution of policing needs to be reimagined. Policing was created to police black bodies."

Hate crimes/hate incidents

- The need for community input
- "Garnered by the community"

Too short a timeframe

- This work has to be long term

Definition of antiracism

- "Antiracism means to be critical of the systems in which we work. And then doing something about it"
- Cultural sensitivity is different than antiracism - <http://www.edchange.org/publications/Avoiding-Racial-Equity-Detours-Gorski.pdf> - the author really makes it clear that talking about "culture" rather than race and racism is a big detour in racial equity efforts
- "Focusing on anti-racism shifts the focus from the victim to the perpetrator or the systems"
- Anti-racism is not EDI, it's not multicultural
- It is questioning the systems that work interconnectedly (housing, mental health, safe consumption sites – these are all anti-racism)
- "I would consider using the word "Intersectional anti-racism"

Publicly available race-based data

Racism is everyone's problem

- "Shift racism from a problem of only racialized people. It affects health. It affects economic development of the whole city. It's a problem for everyone, not just racialized individuals."

Evaluation & accountability

- "We need to think about how we plan on measuring? What does success look like? What are indicators? We need to qualify and quantify. Maybe we plan evaluation timelines based on this City Council/Mayor."
- Environment and Climate Change Canada has a great Diversity, Equity, and Inclusion strategy. Their strategy is specific, measured, they have tracking. Of course there are issues with it, but this one is one of the better ones. We could model a lot of our strategy around this one.

Specific Ideas/Feedback EXTERNAL

School system

- We have anti-black and anti-indigenous issues in our curriculums and our textbooks.
- After the backlash of getting School Resource Officers out of schools, "Schools can't even call Edmonton Police Service when they're having issues because 'nobody's friends anymore'. It's crazy how these systems intersect."
- Schools need culturally relevant psychotherapists
- We need to put money into school systems above the level of 'band-aid approaches'
- Elementary schools have a major role in socialization – we need to make it a positive impact for anti-racism

Establish a commission on hate incidents at a provincial level

Community leagues as a site of opportunity

- Improve community leagues – a lot of community leagues are white-based organizations

Specific Ideas/Feedback INTERNAL

The city should mandate Edmonton Police Services that hate based violence is a priority for the city

- Tie this to a line of funding
- Need for a hate crime unit
- Currently the community has no confidence in the seriousness of hate based violence from the city/EPS

An action-oriented strategy + rooted in community

- Tap into organizations' knowledge – "Organizations have documents on documents. On lived experience of community"

Have a system to keep you accountable

- Accountability process needs to be intersectional
- Evaluation process needs to be intersectional
- Make anti-racism a priority for city funding of organizations
- "Is it possible for funding programs by the city to have something that deals with 'how does your proposal integrate anti-racism principles?'"
- Integrate questions on anti-racism into reporting requirements
- The city can hold organizations to account who rely on receiving city funding

Declare racism a public health emergency

- Other places have done so. It's time that Edmonton did

Policing reform

- "I believe in very strongly that police reform is at the epicentre of any anti-racism effort. If we do not reform the police (EPS), we have not started"
- Quality of policing recruits – ". Most of the jurisdictions that have the best outcomes in the world require a 3 to 4 year bachelor degree in order to become officers. We are currently at a grade 12. It is not good enough. The ranks of killer cops (the most extreme end) is populated with police without university degrees. Those who are more likely to use excessive force (or even rely on force) are those without university degrees."

Opportunity for city officials to set an example

- The power of appearances in the media by counsellors and the mayor on issues or racism
- "Governmental entities are powerful entities. Not just the power they wield but because of their symbolism."
- "Elected leaders can do a lot by modeling things"

Create a commission on hate incidents

- because of course not all incidents make it to the threshold of crime.
- It could provide educational materials, counselling, so on.

Environmental scan of what other initiatives have been done by other cities in the past.

- Look up best practices - Toronto, Nova Scotia, there may be things in the U.S

Other:

- "Have you read Sarah Ahmed's work? The city is still an institution. And institutions want to look like they're doing something."
- "I would be interested for people to have to mention racial equality +. When you say GBA+ no one knows that the plus means."
- Importance of belonging
 - Belonging is one of the most vital influences on mental health of Black Canadians

- Improve community leagues – a lot of community leagues are white-based organizations
- “We are already oversurveilled and overpoliced. How might we imagine approaches that are non-punitive? Everyone that has spoken has mentioned proactive healing approaches. We need the healing. Now we need to create connections and spaces for that. The beautification of our communities – these things are all interconnected.”

Thought Leaders Conversation #3

Tuesday December 7, 2021

6:00-8:00 p.m.

Main Themes:

Accountability

The fact that this is the inaugural motion brings lots of opportunity and hope

Use this window [the current mayor] to make a long term impact

The importance of ‘working with community in a collaborative way’

- That’s empowering
- This means the ability to make decisions and guide this process

Timeline. This work takes time. The question of anti-racism is big.

There is no right answer

- “The system’s answer to anti-racism is part of the problem. There is no one right answer. There is always room for growth and we will always make mistake.”
- “This work is messy”

Intersectionality

- Focus on racialized youth who are part of the 2SLGBTQ community

The role of systems

You can’t do this work without risk

“Get uncomfortable” is the first commandment of anti-racism work

- If council is comfortable, then something is wrong with the strategy

Educating <city> council

- or call it “co-creation of our understanding of racism and its solutions’
- Analogy “We have different grades in the same room and they are asking us to develop a curriculum.”

What is the vision of ‘Success’?

- “If we don’t have a clear vision of what we’re working towards, then where we land will be the right destination.”
- “We should be talking about ‘what is a success? Then when we agree on that,
- we come back to how we will resource that success. What do councillors see as a success?”

The importance of environment in behaviour change

Specific Ideas/Feedback INTERNAL:

Have the office report to someone high up

- “like when it reported to the deputy mayor in the past it got more done”

Let’s build on ceremony, Let’s invest in the Indigenous pace

Let’s do something so practical that you might not call it anti-racism, but it is, like a living wage

Give our leaders incentives to do anti-racism training or education

- Make anti-racism competencies for getting hired or promoted in the city

Take one of the most vulnerable communities who experience racism and do something meaningful with that specific community and learn from it

- Maybe start with Black Muslim Women
- Meaningfully engage the city, engage the councillors etc. in that process; so that they are invested in this and learn from it and approve it being done with another community

Two possible approaches: 1. create an aspirational document; 2. Develop specific strategies for specific populations impacted by racism

- Or you could do both
- The broader the focus, the more likely you will develop a strategy that is high level [and not actionable]
- “the question of anti-racism strategy is big. If we have to answer that question, I worry we will have to make an aspirational document which will not have real impact for the communities that are impacted.”

There needs to be specific action plans to address the system

- “any kind of work in this strategy has to have a component that is Systems focused, rather than just working with community”

February 14th is not realistic

- What if we just come back to council and say ‘hey, this is complicated. You know it, we know it. That’s all we came back with in 3 months’.
- [See themes on timelines and messiness]
- “Something is possible for February 14, but an anti-racism solution will not be possible. We need to set the expectation that not everything will be done for February 14.”
- For February 14th you could start by setting up what success would look like
- “I agree that the councillors may be ready to take a risk. They’re new. But sometimes it’s the people in the system who don’t want to take a risk. Because they’ve been mandated, they’ve been asked. They may not get that not giving an answer is the answer.”
- “We’ve talked about this motion being tangibly. Unrealistic. But what I think it does – it builds some inertia. Some currency that it has. So is there a way to harness and catalyze on this? We’ve done this before – you can get a motion
- from council, and come back and say we’re not here with a strategy, but we’re here with a glimpse of what success looks like. It’s enough to keep inertia going.”
- “If we’re too focused on how not to lose momentum in the system, you will lose community buy-in.”

Idea of pillars

- “An education pillar. An investment pillar. Even naming certain pillars can bring people a lot of hope. Knowing that there’s policy, leadership development, financial investment....In addition, having principles of HOW we’re going to get to those answers. Community centered, exploration of different forms of knowledge etc”

An outcome: City staff reflect the makeup of the city

- Structural changes could be put as a benchmark

Most people can't learn in this area unless it's relationally. Most people cannot just read this and learn it.

- Training and one-offs – we know they have no lasting impact when it comes to attitude change. There needs to be follow-up and continued support

Who should we talk to?

"I think if you talk to community members most affected by racism - then you talk to them about what Sharif said: what change do you want to see in your own life because this anti-racism strategy worked"

"I think you should talk to people who make you uncomfortable. I think you should find out from Sam who is 'combustible' and you should talk to those people. They will point out our blind spots"

Other:

"www.apolitical.co, which is a UK website highlighting the best in public service. It might be worth checking out for any anti-racism resources they may have. Or start putting our own on there."

When every problem that you see is about money, then you think the solution is money

"I like some of the concepts of design work where you try something and learn from it. But I also like research. And I think that both together are important."

"There's no way by February 14th that you're going to get buy-in from everyone. I know there's value in getting the perspectives of those who don't talk to me. We all know that takes time. If you really want this to work, you're going to have to take a risk. You can't do this work without risk."

<https://www.whitesupremacyculture.info/characteristics.html>

"I have been a proponent of putting an anti-racism committee in place. But I don't anymore. That was learning for me. Because the City Council should be the anti-racism committee for our city. It touches everything. So if you put together a committee with no teeth, it can't move the needle."

“Going back with some kind of a document that will plant the seed and allow you to do

some more community work would be the best way I think. And right away starting to educate people that this is an uncomfortable strategy. It’s not your snow removal. It’s not your potholes. Those are tied to money, these are tied to emotions, feelings, relationships – everything about being human.”

Thought Leaders Conversation #4

Thursday December 9, 2021

4:00-6:00

Main Themes:

Previous work in this area has been done by the city – What of that can we use?

Worry that a strategy could turn into giving police more money

The need to define racism for the strategy

Importance of context

- Context determines content [in EDI]
- Learn from other municipalities, but do not cut and paste

People are tired of optical allyship

Data and metrics are important

- And make them openly available

Collaboration and supporting work that is already being done

- Edmonton has untapped potential

We need long term sustainability in this work

- We don’t want to rely on the mayor’s re-election for this work to continue

Be aspirational and not punitive

Address white supremacy and white resentment

Specific Ideas/Feedback:

There are good pieces from previous City of Edmonton anti-racism strategies that could be acted upon

When I think about a strategy, I think of how it can be actioned and owned by the city without having to rely on provincial government.

- “When we rely so much on provincial and federal funding, we get stuck in these cycles dependant on governments.”

Define systemic racism

- “With the three parts of the motion, “hate-based violence” is the only named part of racism. So if we address this, then have we in fact addressed racism in the city?”

Be strategic with other levels of government

- “Maybe it’s about anti-violence at the provincial level and anti-racism at the federal level.”

Provide support for city staff to implement the strategy

- “Senior leaders aren’t going to be the issue, it’s when it filters down to your directors and managers who might not be on the same page. What I’ve observed is you have well intentioned managers who want to do the right thing, but they have no idea where to start. Setting them up for failure within the team.”

Educating the “sleepy middle” is an audience to focus on

Have a database – the evidence of racism

- “You have citizens working to do this work. Why isn’t the city doing it? I think this kind of infrastructure would show its commitment to this plan. And its sustainability.”
- “violence is the form we can see, but what about the other aspects of racism that are less visible, but impact our communities, how are we tracking that data to inform our processes?”
- We need to give easy access to what data there already is and we need to collect new/more data

Support local initiatives doing intersectional approaches to anti-racism.

Invest in tangible structures for anti-racism work within the City

- “looking at other municipalities, reviewing how the city of Toronto has in the last three years expanded their EDI, human rights office, dedicated anti-black racism employees. Montreal hired an anti-racism directorate. Vancouver had established a chief diversity officer position. I think it’s a matter of seeing where does Edmonton fit amongst all this? I think there might be appetite there. Seeing how a position would be able to carry on this work.”
- Positions that have significant input and impact. Having some tangible reach
- “You need dedicated resources around anti-racism work. It takes committed positions from what I’ve observed. It also takes it out of the hands of police. So police stay in their lane and focus on crimes.”
- “You cannot default to the diversity unit. You need appropriate oversight.”

We need to be collaborative

- “There are community groups really passionate and doing the work, but there is a competition for resources for funding, we are not being as effective”
- “we also need to acknowledge what has already been built but we are not letting access to”
- Take this opportunity to empower organizations so they are set up for success even after our mayor changes
- The city is uniquely positioned to support this work in organizations through funding

How can we use the things that are already established in our city?

- Heritage days has a lot of untapped potential
- “Don’t have to burn it all down, we can look at the architecture and see what can be remodeled.”

We need to address white supremacy

- “This idea of white racial resentment. It’s important to focus on the work of individuals and prioritize those with lived experience. AND alongside that tackle white supremacy and white racial resentment.”
- “An aspiration - have our mayor be able to talk about white supremacy and not have to walk that back.”

Education is not enough

- “It’s not enough to know. Education is not enough. It’s the practice that goes along with it. Giving clear strategies. If I don’t know what to do about it, then I’ll do nothing. Bring it to something I can relate to in my space.”

Other:

See more potential and leverage at the federal government currently than the provincial government

- Note: Another participant countered to not ignore the provincial government.

What are we doing to ensure that talent stays in our city?

- “Show the rest of the country that we’re not as far behind as the rest of the country believes without alienating the rest of our province?”

“You want your leaders to be talking about this to make real change, but you also want them to know what they’re talking about. When leaders use the buzz words around anti-racism, if they were to be put on blast by community members and asked “what does anti-racism mean to you?” I worry they would stumble on their words.”

“Racism has been built into our systems for a very long time. Part of the report needs to contextualize the history of racism. And spell out the manifestations of racism and what we know now and this is what we are addressing. So you’re able to articulate what you’re working to address right now, knowing society continues to evolve. That also give some grace. We also know how quickly people will turn when it doesn’t look like you’ve done what you said you would do.”

Address mental health support for everyone [not just those who have experienced racism or violence directly]

“We are trained to go to solutions that we know are not effective solutions. We overuse and exploit the people who are suffering the consequences of this system. When you put the work on certain populations, it’s exhausting.”



URBAN PLANNING COMMITTEE REPORT

Mass Transit: Planning for 1.25 Million People

Recommendation of the Committee

That the Metro Line Extension from Blatchford to Castledowns be reflected in the first phase of the City Plan for planning up to 1.25 million.

History

- At the February 15, 2022, Urban Planning Committee meeting, the February 15, 2022, Urban Planning and Economy report UPE00342 was considered.
- The Committee heard from L. Thompson, Castle Downs Recreation Society; and P. Chahal.

Attachment

February 15, 2022, Urban Planning and Economy report UPE00342

MASS TRANSIT: PLANNING FOR 1.25 MILLION PEOPLE

RECOMMENDATION

That the February 15, 2022, Urban Planning and Economy report UPE00342, be received for information.

Report Purpose

Information only.

The intent of this report is to inform Urban Planning Committee of the mass transit network planning for a population of 1.25 million, as well as next steps for implementation.

Executive Summary

- The City Plan envisions a vibrant and prosperous city with an integrated transportation network, providing residents with convenient and equitable options.
- Foundational to this network is a robust transit system, including an evolved mass transit network that anchors an overall mobility system which connects all areas of the city.
- This report summarizes a critical implementation piece that advances The City Plan's Systems and Networks.
- Administration conducted a technical study to identify a mass transit network that supports The City Plan concept at a population of 1.25 million people.
- The findings of the mass transit technical study identify a network that includes the strategic expansion of LRT routes in consideration of additional mass transit options that include bus rapid transit, limited stop and frequent routes.

REPORT

The City Plan envisions a vibrant and prosperous city of two million people with half of future population growth occurring in established areas. The foundation of our future urbanized city is an evolved mass transit network which supports nodes and corridors. In turn, the nodes and corridors provide the necessary urban structure to direct future investment and manage ongoing change. Ultimately, these combine to support greater community equity, opportunity and connectedness. Building off of the Bus Network Redesign, a well-integrated mass transit network

Mass Transit: Planning for 1.25 Million People

will provide Edmontonians with access to safe, convenient and reliable service with faster journey times, and contribute to reaching a target in which 50 per cent of all trips are made by transit and active transportation. The mass transit network for two million people is illustrated in Attachment 1.

The transit network will continue to adapt in response to emerging technologies and mobility services, and will increasingly move towards a low carbon operation. Investing in a complete transit network, with mass transit serving as the foundation of that system, will be an increasingly important tool for both city building and climate resilience as Edmonton grows.

As part of The City Plan implementation, Administration completed a mass transit technical study that identifies a mass transit network to support a population horizon of 1.25 million people. This mass transit technical study is the first step to identify opportunities and constraints for future mass transit development and is an important part of Edmonton's journey to achieve its goals for greenhouse gas emissions reductions.

Project Background

Success Factors for 1.25 Million Population Horizon

Critical success factors, identified from The City Plan mass transit study and incorporated into this planning work, are key to support the mass transit network at a population of 1.25 million:

- **Mass Transit Priority:** This refers to the reallocation of existing road right-of-way in order to create dedicated transit right-of-way. It also refers to the introduction of transit priority measures, including additional transit signal priority and semi-exclusive right of way. These measures represent a significant shift in approach that will help to increase capacity, improve reliability, reduce travel times, and provide opportunities for service to respond to ridership growth.
- **Future Development Opportunities:** Mass transit succeeds when it is supported by future land use development and intensification, particularly in priority growth areas. Transit-oriented development in nodes and corridors, supported by mass transit stops and stations, should influence when future mass transit extensions are built.
- **Filling Network Gaps and Parallel Corridors:** Parallel mass transit routes can balance passenger loads from overloaded mass transit routes. Mass transit routes can also fill network gaps and improve accessibility to transit.
- **Parking Policy and Mobility Hubs:** Parking pricing and availability, including strategic application of Park and Ride and the development of mobility hubs, will allow the mass transit network to be well connected with other travel options.

The scale with which these mass transit success factors are applied will have a direct effect on climate change goals given the impact of the mobility system on greenhouse gas emissions.

Mass Transit Network to Support 1.25 Million Population

This study identifies the mass transit network required to support The City Plan concept for 1.25 million people, as illustrated in Attachment 2. This network is based on the Bus Network Redesign and LRT expansion and aims to increase transit ridership and mode share in line with the City

Mass Transit: Planning for 1.25 Million People

Plan concept. Specific terms used to describe mass transit or the types of service are further defined in Attachment 3.

City-Wide Routes

City-wide mass transit networks include LRT and bus-based mass transit routes to provide the foundation of public transit and create city-wide mass transit circuitry connecting all quadrants. The LRT network provides key city-wide routes. High-floor LRT runs mainly along exclusive rights-of-way while the urban-style, low-floor Valley Line will operate in a dedicated right-of-way with more integration into the surrounding streetscape, communities, and destinations.

Bus rapid transit routes will provide new connections and alternatives to congested corridors, often at a lower capital cost. The development of these routes will be important to achieve the ultimate mass transit network envisioned in The City Plan. Bus rapid transit routes can be implemented through a cohesive, context-sensitive combination of dedicated travel lanes on key corridors and transit priority measures at key intersections. Bus rapid transit routes envisioned for a 1.25 million population involve the reallocation of space on existing infrastructure, and are not anticipated to require grade separations or new river crossings.

Bus rapid transit is not intended as a precursor to LRT but complements the LRT network. The mass transit planning technical study identifies alternative approaches to increase transit ridership through semi-exclusive, bus-based service, such as bus rapid transit and select limited stop rapid routes.

District Routes

District routes fill gaps in the mass transit network and provide connections to city-wide routes, nodes and corridors, and major employment areas. Many district routes will be an evolution of existing ETS bus routes, including new bus routes, with higher service levels. Growth and evolution of the bus network to respond to population growth, particularly in support of nodes and corridors, are necessary to realize these district routes to better serve 15-minute communities.

Limited stop rapid routes and urban frequent routes will make up most of the district route network. Limited stop rapid routes will evolve from the combination and/or upgrade of existing ETS bus routes, including new bus routes, through the use of key operational and infrastructure investments such as increased service and transit priority measures. Frequent urban district routes consist mainly of existing ETS bus routes, including new bus routes, and are expected to become increasingly important. Future service levels will respond to and facilitate the intensification of key nodes and corridors.

Supporting Service

The mass transit network will be supported by several additional types of non-mass transit service provided by the local transit network, including the new bus network, and our regional partners.

- **Local Transit Network** includes multiple layers of transit service including conventional bus, on demand transit and paratransit. The local transit network generally balances access with

Mass Transit: Planning for 1.25 Million People

speed. These routes provide an alternative to driving for shorter trips within districts and create connection points to the mass transit network.

- **Regional Routes** will be integral to the continued prosperity and connectivity of the Edmonton region. These routes will be guided by regional partners and entities, such as the Edmonton Metropolitan Transit Service Commission. Pursuing opportunities associated with future regional routes will require continued connection and collaboration with regional partners.

Findings and Implications

Focused investment in strategic transit corridors will require a careful assessment of how Edmonton uses available transit funding to achieve The City Plan outcomes. Below are the key findings and implications outlined in the technical study.

- **LRT Network Plan** - Aligning future LRT expansion to high development potential will provide the most benefit to the overall mobility system. Based on the technical study, the 1.25 million population mass transit network includes the future Capital Line extension beyond Ellerslie Road but does not include the Metro Line extension beyond Blatchford. This finding differs from previous City Council priorities regarding the LRT network plan which were set prior to City Plan approval. Metro Line extension north of Blatchford was identified as the next priority after the Capital Line South extension to Ellerslie Road. Decisions related to future LRT expansion will be set by City Council as the availability of transit funding becomes clearer.
- **Bus Rapid Transit** - Creating new bus rapid transit and limited stop rapid connections will improve service to existing demand and provide alternative connections to key nodes and corridors. New dedicated bus right-of-way opportunities paired with transit priority measures at key intersections will allow these routes to operate more efficiently and reduce travel time. There are opportunities to create dedicated rights-of-way for transit in the 1.25 million population horizon through the redistribution of road space and allocation of travel lanes along major arterial roadways such as 97 Street, Whyte Avenue, Terwillegar Drive, Whitemud Drive and Gateway Boulevard/Calgary Trail. Additionally, incorporating bus rapid transit and rapid bus service as part of the mass transit network provides relief to capacity-constrained routes, such as the Capital Line, and extends mass transit service to key destinations that complement the LRT network.
- **Airport Connection** - An efficient and direct mass transit service to an airport is a key feature of world-class cities. The mass transit study recommends a connection to the Edmonton International Airport that does not consist of an extension of the LRT past city boundaries. As such, the initiation of a direct bus-based mass transit connection between downtown and the Edmonton International Airport has merit to explore with regional partners.
- **Benefits of Mass Transit Network** - The technical study found that the improvements to the mass transit network are expected to capture future travel demand, resulting in a modest increase to transit mode share and corresponding reduction of greenhouse gas emissions. Transportation is one of the four major sources of greenhouse gas emissions within Edmonton, making up approximately 30 per cent of all emissions. Transitioning towards zero emission mobility options, including a zero emission transit system that features a fleet of

Mass Transit: Planning for 1.25 Million People

zero/low emissions vehicles, will significantly reduce greenhouse gas emissions. Greater benefit to transit mode share or greenhouse gas emissions could be achieved by applying additional levers of change identified in the February 2, 2021, Urban Planning and Economy report CR_7810, Transit Mode Share - Increase and Impacts.

The approval of The City Plan and associated technical studies, including the findings noted above, provide an opportunity to consider an overall assessment of mass transit network priorities. This could include a reassessment of future LRT expansions to consider them alongside mass transit routes serviced through bus rapid transit routes, and/or other mass transit options. The intent would be to implement and prioritize each component in a way that benefits Edmontonians and best contributes to The City Plan outcomes. It will be important to consider both upfront capital costs and overall operational costs associated with the specific type of service when determining future mass transit priorities. Further planning work is required to determine costs and benefits for prioritization.

Next Steps

The findings identified through the mass transit technical study are incorporated into the February 15, 2022, Urban Planning and Economy report UPE00491, Mobility Network Assessment. The Growth Management Framework, currently under development, will provide a lens to evaluate mass transit investments that support growth in consideration of priority growth areas.

Future planning work for implementing the mass transit network for 1.25 million people includes:

- Define types of mass transit for future consideration
- Operational study to identify conflicts and opportunities, including consideration for emerging technologies
- Complete technical studies related to
 - Development potential along mass transit routes
 - Impacts to the mobility system
 - Equity and inclusivity considerations
 - Impacts to climate strategy goals
- Assess and evaluate mass transit route alignments and design
- Identify mass transit network staging plan for 1.25 million people

Addressing needs identified in the February 15, 2022, Urban Planning and Economy report IIS00416, ETS Fleet Storage and Maintenance Facility Project and the upcoming City Operations report CO00607, Mass Transit System - Sustainable Funding and Service Growth, will be critical to the growth and implementation of The Mass Transit network. Interim enhancements to the existing ETS network through service enhancements and stand-alone transit priority measures will be presented as part of the upcoming City Operations report CO00803 Bus Network Expansion Opportunities. These interim measures can reduce travel times and improve existing transit service levels. Opportunities to evolve these interim enhancements will be considered as part of the mass transit implementation noted previously.

Mass Transit: Planning for 1.25 Million People

BUDGET/FINANCIAL IMPLICATIONS

Further planning and design work is required prior to providing an accurate assessment of implementation costs. Additionally, future technologies can affect the implementation and costs of building out the mass transit network envisioned in The City Plan.

COMMUNITY INSIGHT

The mass transit planning technical study did not include any direct input from the community. However, the project relied on the direction provided in The City Plan and other strategic documents that included robust public engagement with, and listening to, Edmontonians. Additional research and/or conversations with Edmontonians and other stakeholders would be included as part of the project development process for mass transit projects that proceed to planning and design.

GBA+

Inequities and exclusion for marginalized people can result from mass transit networks when equity and inclusion lenses are not applied intentionally or consistently. An extensive GBA+ process will ensure that the work does not create inequities or contribute to the further marginalization of diverse individuals.

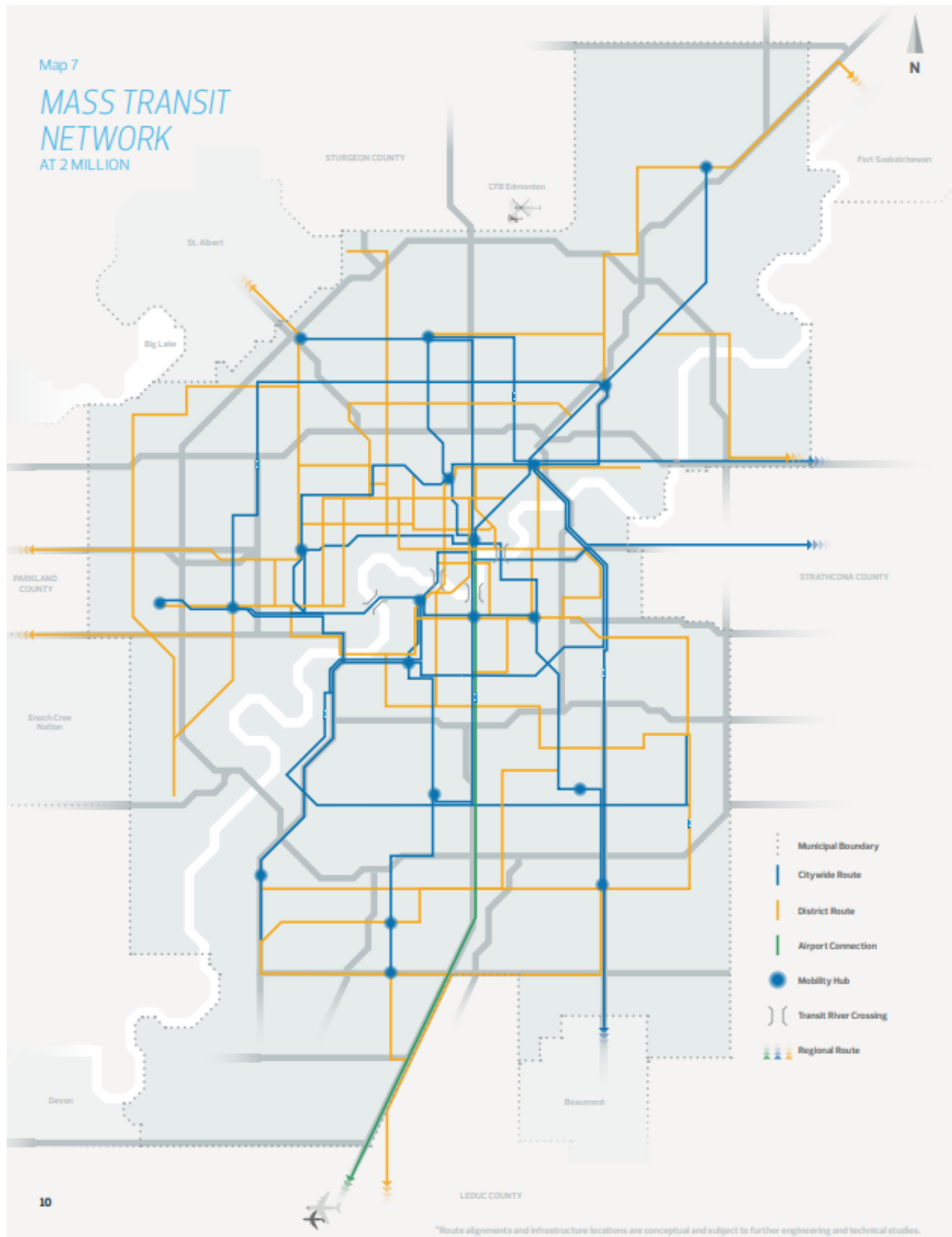
As part of implementing the 1.25 million mass transit network, Administration plans to complete the following in 2022:

- Complete a literature review to identify inequities, exclusion and unsafe conditions that result from transit systems.
- Complete a review of transit agencies in Canada and around the world to identify potential equity and inclusivity measures, to understand the challenges faced and successes achieved, and how successful they proved to be.
- Engage with marginalized populations of Edmontonians to ensure research findings reflect diverse experiences and perspectives of individuals in Edmonton.
- Use quality of service models and neighbourhood demographic data to identify inequities experienced by users of the mass transit network at 1.25 million.
- Select equity measures to monitor the effectiveness in achieving equality of outcomes throughout network implementation.

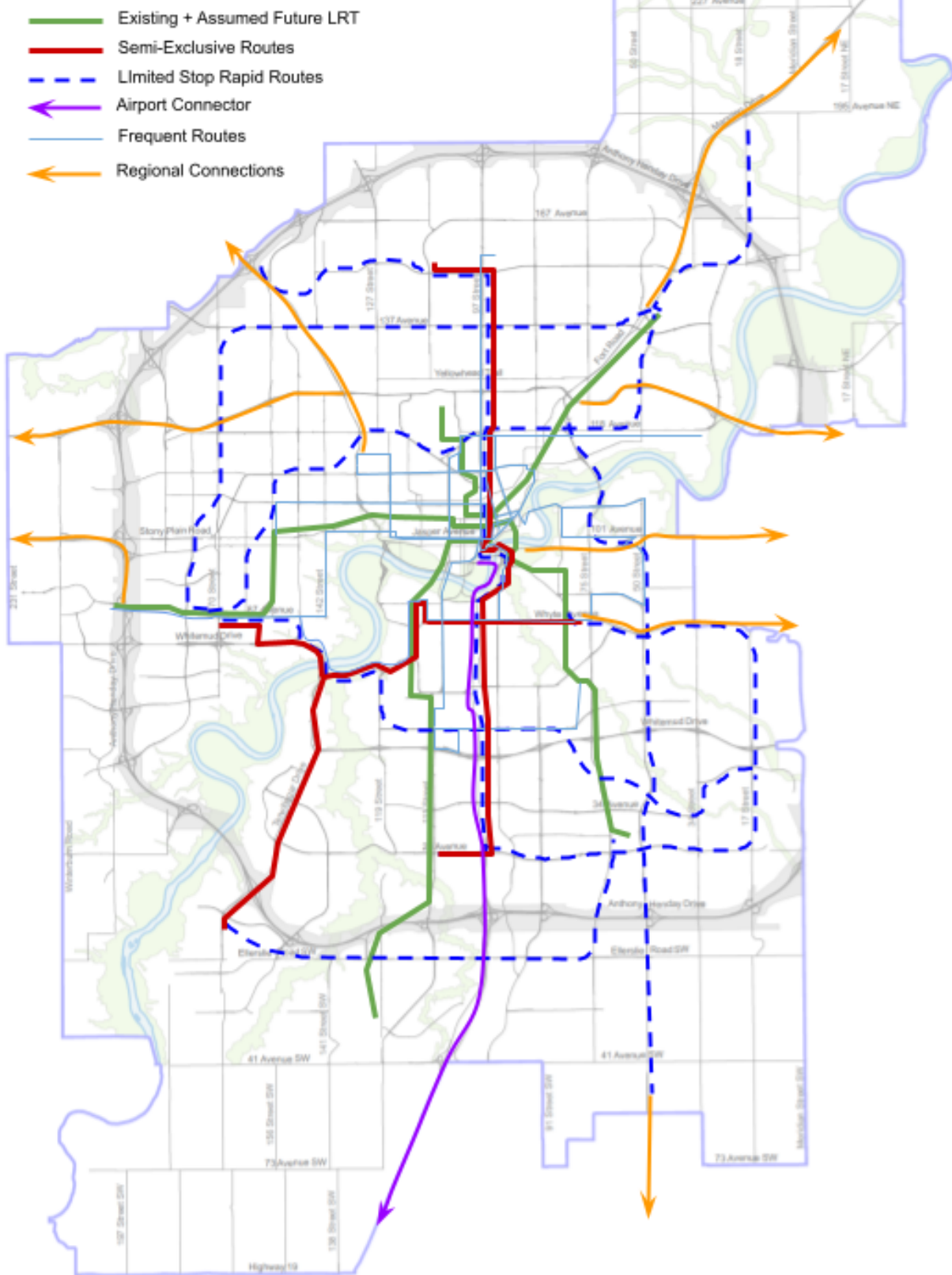
ATTACHMENTS

1. City Plan Mass Transit Network
2. Mass Transit Network for 1.25 Million: City-Wide and District Routes
3. Glossary of Terms and Mass Transit Service Definitions

City Plan Mass Transit Network



Mass Transit Network for 1.25 Million: City-Wide and District Routes



Glossary of Terms

Bus Rapid Transit (BRT)

The term “BRT” tends to be used inconsistently across jurisdictions and municipalities. BRT generally refers to enhanced bus service that typically includes dedicated transit infrastructure. The most common definitions typically include (but may not be limited to) the following features:

- Dedicated right-of-way
- Busway alignment away from the curb lane
- Off-board fare collection
- Intersection treatments
- Platform-level boarding

Bus based mass transit systems in Canada and around the world are identified as BRT by incorporating differing levels and combinations of these features. Defining what constitutes BRT in Edmonton will be part of the continued work associated with implementing the mass transit network for 1.25 million people.

Mass Transit

A broad family of strategic public transit services that carry higher volumes of passengers within urbanized areas.

Regional Connections

Regional connections operate partly or entirely outside of Edmonton. Most regional connections operate as rapid transit routes between municipalities in the Edmonton Metropolitan Region.

Road Right-of-Way (ROW)

Road right-of-way defines the use of public property designated for people walking, rolling, biking, using transit and driving.

Transit Priority Measures (TPM)

Traffic management tools that give public transit priority over other vehicle traffic to improve speed and reliability of transit service. Transit priority measures fall into three categories, although they are often used together:

Regulatory Tools: Regulations applied to roadway operations to improve performance of the transit system while making use of the existing roadway. Examples include parking bans and restricted left turns for other vehicles.

Transit Signal Priority: The use of traffic signals to reduce delays for transit vehicles. Examples include transit-only signals and coordinated signal timing that favors transit.

Roadway Design Elements: Includes improving transit operations through roadway design including dedicated lanes and queue jumps.

Transit Right-of-Way In the context of transit routes, right-of-way describes how a transit vehicle interacts with other vehicles along the roadway or corridor. Generally, transit routes operate in one of three right-of-ways:

Mixed Traffic: Transit vehicles operate in travel lanes used by other vehicles.

Semi-Exclusive: Transit vehicles operate in a separate lane from other vehicles for parts of the corridor and are mixed with other vehicles for other parts (i.e., at intersections, driveways and/or turn lanes).

Exclusive: Transit vehicles operate entirely separate from other vehicles within their own lane and crossings or within their own dedicated corridor.

Mass Transit Service Definitions

Frequent Transit	Frequent transit provides high service frequencies to serve busy routes and minimize waits and transfers. Stops along frequent transit corridors tend to be spaced closely to reduce walking distance for people and to make transfers more practical. Because of this, frequent transit routes tend to be slower than rapid routes but can potentially move high volumes of people along densely populated corridors.
Light Rail Transit (LRT)	A family of urban rail-based passenger services which can provide high capacity and speed, but typically travel slower and use smaller vehicles than long distance rail services. In Edmonton, LRT includes High Floor LRT (Capital and Metro Lines) and Low Floor LRT (Valley Line).
Limited Stop Rapid Transit	Limited stop service allows faster travel than local and frequent bus routes by stopping at strategic locations and bypassing intermediate stops. These routes may include higher capacity vehicles and some transit priority.
Local Transit	Local transit routes serve neighbourhoods and local destinations, and connect to other local routes and/or higher orders of transit (i.e., mass transit).

Report

Mass Transit Planning for 1.25 Million Population

Mass Transit Component of Mobility Network Assessment



Prepared for City of Edmonton
by IBI Group
December – 2021

Prepared by IBI Group


BY



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Glossary and Abbreviations

AM	The early morning (7am to 8am) weekday peak hour.
BNR	Bus Network Redesign
BRT	Bus Rapid Transit
CBD	Central Business District (Edmonton City Centre Node)
CL	Capital Line (LRT)
EIA	Edmonton International Airport
ETS	Edmonton Transit Service
HOV	High Occupancy Vehicles (can include carpools, transit and taxis)
IRTMP	Integrated Regional Transportation Master Plan (developed for the Edmonton Region with City participation)
LRT	Light Rail Transit
MD	The typical midday (9 am to 3:30pm) weekday time period. Statistics are usually for one hour.
ML	Metro Line
MTN	Mass Transit Network
PM	The late afternoon (4:30pm to 5:30pm) weekday peak hour.
RTSC	Regional Transit Services Commission
ROW	Right-of-Way
WEM	West Edmonton Mall (in the context of this report, the Transit Centre and future LRT stop)
VL/VLSE	Valley Line/Valley Line Southeast

Airport Connection	Airport service within the City-wide network with direct connection to the Centre City node with connections at key nodes along the way
Corridor	A place for movement, living and commerce that is anchored by key mobility networks and well connected to surrounding communities.
<i>Design Capacity for LRT</i>	<p>High Floor LRT (Capital and Metro Line): 150 passengers per car, and 750 passengers per 5-car train. With the Capital Line running at 5 min headway and Metro Line running at 10 min headway during the morning peak hour (for the 1.25 Million horizon), the total capacities will be 9,000 passengers per hour per direction (pphpd) for the Capital line and 4,500 passengers per hour per direction (pphpd) for the Metro Line.</p> <p>Low Floor LRT (Valley Line): 225 passengers per car, and 450 passengers per 2-car train. With 5 min headway during the morning peak hour, the total capacity for Valley Line will be 5,400 passengers per hour per direction.</p>
District	A grouping of neighbourhoods with diverse amenities that support living more locally.
Edmonton Metropolitan Region	The geographical area that is home to more than one million people, has a diversified economy, and surrounds several municipalities and three first nations 24 municipalities and three First Nations. The City of Edmonton is continuously working with its regional partners to help the Region thrive and prosper while also addressing the challenges of rapid growth.
Future Growth Area	Lands south of 41 st Avenue SW for which substantial completion of developing areas is required before authorizing the preparation of statutory plans.
Mobility Hub	A place for trip origins, destinations, and transfer points to allow people to seamlessly move from one travel option to another as needed. Mobility hubs are typically located in nodes and centred at cross sections of mass transit routes to create connections within Edmonton and the region.
Networks	Networks are spatial representation of physical or conceptual elements that link together or are related.
Nodes	Centres of activity of different shapes and sizes that feature a variety of housing types, gathering places, a mixture of land uses and varying tenures and affordability. There are three types:
Passenger Boardings	The number of passengers that get onto (board) transit vehicles. It is a measure of how many people use a transit route or transit system.
Passenger Volumes	The number of passengers on board a transit vehicle at a specific point on the route. At any given time, this is how many people boarded the vehicle since the start of the route, minus the number who have already left the vehicle at an earlier stop.
Peak Hour Passenger Volumes	The total number of passengers travelling in the peak direction on one or more transit routes, operating in the same direction, during a one-hour period. This value is the sum of the passenger loads on the individual vehicles during that hour. It indicates how busy the route (or corridor) is during the time period.
Critical/Maximum Load Point	This is the location or segment of a route where the highest passenger loads are experienced in one direction during the time period in question. It is also referred to as the maximum passenger load or volume. This number is often compared with the capacity of a transit route to assess if the right amount of service is being provided.
Passenger Loads	Synonymous for passenger volumes.
Directional Peak Load	This is the passenger load at the critical load point, only counting the peak (higher value) direction.
Peak Hour Capacity	This is the theoretical number of passengers that can be carried on a transit route or transit mode past a single point or location, in one hour. It is a function of vehicle space

	<p>× number of vehicles per hour. The peak capacity assumes that vehicles arrive as scheduled and counts all passenger spaces (seated or standing) that are provided in the peak direction of a transit service. It is challenging to achieve peak capacity because passengers are not evenly distributed throughout transit vehicles, and when vehicles are fuller, slower passenger alighting and boarding can end up delaying service.</p>
Service Planning Capacity	<p>This is a lower threshold for transit route capacity where the density of standing passengers is lower than the design load for that type of vehicle. It implies greater ease of passengers circulating on board, alighting and boarding the vehicle. This planning capacity is used to estimate how many vehicles a transit route should be allocated, with a safety margin built in for extra demand.</p>
Transit Facilities	<p>A location where residents can access public transit. Includes bus stops, train stations and transit centres.</p>
Transit Vehicle Capacity	<p>This is the number of passengers a transit vehicle can carry if full. It counts the seats on a transit vehicle plus an estimated number of people standing, assuming 'x' people per square metre of floor space in the vehicle. Since the 'x' value for number of people depends on operational needs and practices, there can be a range for this capacity value. (Please see Peak Hour Capacity and Service Planning Capacity)</p>

Executive Summary

The City of Edmonton recently approved The City Plan, a long-term plan developed for the future growth of the city to 2 million people. The City Plan contains policies and outlines the systems and networks including a set of planning and design, mobility, and growth management systems. An Ultimate Mass Transit Network was defined, which included several major elements:

- Continued expansion of the 'conventional' bus network to serve all areas of the city;
- Frequent bus services operating on major arterials and passing through the central neighbourhoods of the city;
- Limited-stop (or rapid) bus services operating in mixed traffic but at higher speeds than conventional routes;
- Semi-exclusive transit routes where the service operates in dedicated lanes in the middle or alongside major corridors. These also operate with more limited stops and the separation from other traffic, allows these routes to run faster and more frequently across the city.
- Exclusive ROW routes, which includes existing and future LRT lines. While some sections of the LRT operate in semi-exclusive sections, all parts of the LRT benefit from signal priority and pre-emption to allow for high frequency, longer vehicles, and high capacities.
- The long-term vision also includes a connector from the airport to downtown, either by rail or semi-exclusive bus.
- Regional services were assumed to ensure connectivity with the Edmonton Metropolitan Region; the long-term form of these services rests with the Regional Transit Services Commission.

The elements of the ultimate mass transit network for 2 Million population were the starting point in defining network options for 1.25 Million, nominally 10-15 years in the future.

Future Base and Options A/B

Major considerations in defining the future base transit network (Base) and two evaluation options (A and B) included:

- Continued expansion of the LRT network as committed, and of the bus system into growth areas;
- The expected staging of population and employment growth;
- Interpolation of additions in service between today and the ultimate mass transit network;
- The operational and physical constraints, challenges and opportunities for transit identified by stakeholders.

These were evaluated using the travel demand model as the principal tool, along with GIS analysis of corridor characteristics. An evaluation was carried out to assess which routes from these future options appeared to be stronger choices for implementation in the 10-15-year time frame. This largely links back to the land uses and destinations being served and the resulting ridership on transit. There is also a logic in building up the transit network where parallel routes can offer alternative paths for passengers, and relieve pressures on more crowded parts of the transit system.

When comparing the more robust mass transit option with the 1.25 million base network, the results of the technical analysis project an increase in mode share. The resulting 9.3% weekday transit split considers all trips in Edmonton. The increase from the transit share of 8.2 percent recorded in the 2015 household travel survey should be analyzed in the context of a much higher population basis for the future mode share results. The number of transit riders will not only have kept pace with growth of the city but is also forecast to make additional gains.

Recommended Interim Network for 1.25 Million population

Based on the performance of the mass transit routes modelled and the success factors considered for mass transit, the following elements are **recommended for an interim 1.25 million population mass transit network**:

- The Heritage Valley Major Node extension of Capital Line is more likely to occur, ahead of the Metro Line extension beyond Blatchford due to the expected development to occur at this Major Node.
- Several infill LRT stations are possible as development opportunities arise. Business cases should be created to validate their potential. are needed as opportunities arise.
- B1 (part BRT/ part rapid bus) replaces and expands on existing routes, operating from Century Park to Campbell Road connecting Whyte Avenue, the Centre City Node with the north and south sections of the city and Castle Downs
- B2 (part BRT/ part rapid bus) will connect from West Edmonton Mall to Bonnie Doon through the University of Alberta and Whyte Avenue. The balance of service levels and stopping patterns on B2 and existing routes warrant further study.
- B4 and B5 will initially begin service as rapid bus - to build demand.
- Terwillegar Bus Lanes will be implemented and converted to the "BRT" B6 with a rapid bus extension to University station. This will help avoid a forced transfer and provides additional capacity parallel to the peak load point on the LRT network.
- RapidBus routes R3, R12, E2 (110X); and R6 are recommended to provide a consistent spacing across the city of limited-stop bus routes. The higher achievable speeds attract additional future passengers. R9 and R109 are recommended to provide peak rapid service and connections to LRT from outlying development.
- Initiation of the Airport Connection using Hwy QE2 and follow the B1 routing.

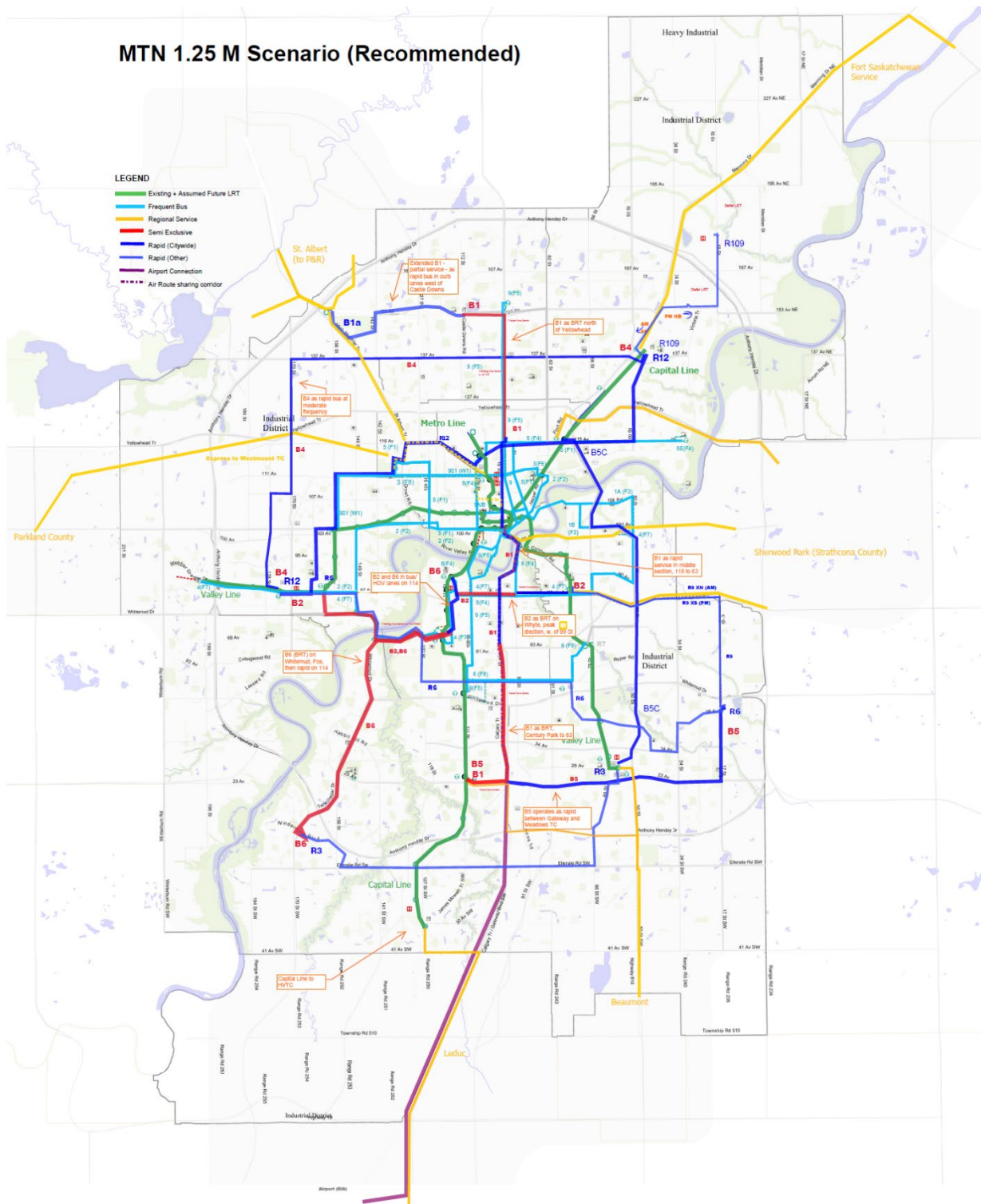
Exhibit ES.1 illustrates the recommended network.

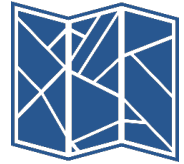
The **order of magnitude costs** to construct these lines and procure vehicles are estimated at \$595 Million in current dollars, when comparing the recommended network to the future base. This includes \$325 Million for LRT expansion, \$220 Million for BRT and \$50 Million for rapid bus. These are planning-level costs and in particular the BRT and rapid bus costs are subject to a - 50%/+100% uncertainty depending on the project scopes that get developed.

This figure does not include the costs of the future base. The background growth to 1.25 Million population will require additional buses, stops, garages and other amenities. The committed construction of the Valley Line, Terwillegar bus lanes, and the pending extensions of the Metro Line and Capital Line (by two stops apiece) are also excluded from the costs cited above.

Next steps to implement the network will include additional route-level planning and evaluation to further define the services, updating and expansion of design standards to encompass new forms of transit, and monitoring how other initiatives such as SmartFare and Transit Priority Measures could complement this. More broadly, the planning for these routes needs to be linked to land use planning and staging, including the planning and implementation of **Mobility Hubs** at key locations around the **Mass Transit Network**.

Exhibit ES.1: Mass Transit – Recommended Elements – 1.25 Million Population Horizon





Introduction

The City of Edmonton recently approved The City Plan, a long-term plan developed for the future growth of the city to 2 million people. The City Plan contains policies and outlines the systems and networks including a set of planning and design, mobility, and growth management systems. This includes high level direction on the form that municipal infrastructure and services will take. As the city physically grows, this increases the needs for community connections, jobs, housing, amenities and services such as transit. The plan broadly defines built physical spaces, options for how to get around, new connections to support businesses, and more lifestyle choice.

The mass transit study was one of several studies looking ahead at the “2 million people” horizon and working towards building a future vision. The strategic outcomes of The City Plan and of the ultimate mass transit network were developed in parallel, and each will support the other.

What Is Mass Transit?

A broad family of strategic public transit services that carry higher volumes of passengers within urbanized areas, such as the Edmonton Metropolitan Region.

Includes rapid and/or frequent transit for faster trips of varying lengths within the urban area to cross the city and provide reliable local connections.

Also includes regional scale services for longer trips within the city, and to and from surrounding areas.

As the next step in advancing the network envisioned in The City Plan, work has been carried out to develop options that build incrementally towards the 2-Million-person horizon, considering two interim stages: 1.5 Million population, and 1.25 Million population. These have nominal date ranges of 2045/2050 and 2030/2035 respectively, but it is the matching of transit services to the growth horizon that is important. The nominal dates are ‘shorthand’ for when the future population (and associated employment) thresholds could be reached, and it is against those targets that the transit analysis has been carried out for the interim stages.

The City of Edmonton is contributing to the Edmonton Metropolitan Regional Board’s Integrated Regional Transportation Master Plan (IRTMP), which was also under study in 2020-2021. To ensure some consistency between base assumptions, this study developed a proposed Mass Transit Network for the 1.5 Million horizon by working back from the ultimate network envisioned for 2 Million, and assuming approximately half the investments in service and infrastructure would be achieved by that time. This considered the broad implementation phasing of the land uses in The City Plan to help guide where most of the new mass transit would be focused.

Within that context, a review of opportunities and constraints for mass transit projects was carried out to identify where there were near- to medium-term issues to be explored while developing options for the 1.25 Million horizon. These issues touched on LRT extensions, planned and proposed rapid bus services, general expansion of transit service coverage as the city grows, and the potential to increase service rail and bus service frequency within the financial and technical capabilities of the system.

The assessment of transit services in this technical report compares a future Base scenario and two options where additional mass transit services are overlaid, with differences in the combinations of routes that were included. The results of the evaluation are being used to inform an initial recommendation for the interim Mass Transit Network for the 1.25 Million population horizon.

The remaining sections of this report explain:

- the development of the mass transit network, the categories of mass transit service, and the considerations in defining modelling options.
- the overall performance of the options in attracting passengers, and the associated fleet requirements
- route-specific comparisons of performance to determine which elements are the most promising for implementation during the planning horizon;
- A description of the recommended interim network, including a discussion of each of the major elements;
- Implementation considerations, including service design and creation of mobility hubs.

It is intended that these routes (as well as local transit, first-km and last-km services, and mobility hubs) will provide high quality, reliable and efficient service allowing Edmonton residents to live and move within their community and connect to other communities thereby transforming Edmonton into a true community of communities.



High-Level and Walterdale Bridges, as seen from the Capital Line LRT crossing of the North Saskatchewan River. These all have a role in the future Mass Transit Network.



2. Mass Transit Options Development

The development of the ultimate mass transit network was carried out in parallel and in conjunction with The City Plan. The study process, major assumptions related to the transit networks, and the proposed network are described in the following sections. This includes maps and descriptions of the proposed routes forming the longer-term mass transit network, and several options defined for interim stages.

2.1. Development of the Mass Transit Network for 2 Million Population

The mass transit scenarios were developed through an iterative and consultative process, with the following main steps in compiling and applying the relevant input:

- The **Mass Transit Backgrounder** provided background on the current context and some of the future (Bus Network Redesign, LRT Network Expansion) plans already in place for Edmonton's transit network. It also looked at how different travel markets respond to the transit service on offer, and reviewed several cities in Edmonton's peer group to draw out lessons about coordinated transit and land use planning.
- The **City Plan Mass Transit Scenario Analysis** documented the transit-focused evaluation results for the refined versions of a future base (referred to as Business As Planned for 2065) and evaluation concept cities I, II and III. The intent of the evaluation was not to choose a scenario, but to identify which network elements worked together better than others, and the reasons why – such as how they connected and how they interfaced with the land use.
- Since the analysis results were driven more by the service assumptions rather than the technology used for modelling purposes for routes, the recommendations are mostly technology-neutral, except for approved and committed LRT extensions.

The **Mass Transit Network** report, issued February 2020, documents the proposed long-range network, and forms the basis for the current work presented in this report. The City Mass Transit Plan reports have links to the documents provided in Appendix B.

For the purposes of the ongoing study, some assumptions regarding technology type and specific route alignment on corridors were made to carry out the technical analysis. **It is critical to recognize that these assumptions should not be interpreted as final decisions on technology, alignment or station locations.** Furthermore, the network was not aligned with preliminary discussions around a proposed Regional Transit Services Commission (RTSC) network although similar desire lines have been identified by both studies.

Exhibit 2.1 shows the structure of the network, including the rail elements (LRT in green), semi-exclusive transit (shown in red), Airport Connection (in purple) and routes operating in mixed traffic (rapid bus in dark blue, frequent bus in light blue, and major regional routes in yellow). The following are the main highlights of the network:

- **Frequent.** These include 'F' routes carried forward from the future base, with some refinements to service levels. Buses in these routes operate in mixed traffic, make all local stops, and operate at least once every ten minutes in the AM and PM peak and 15 minutes in the midday and early evening. The mass transit network includes more emphasis on denser areas, and several brand-new routes were added to intensify central area service. This approach was based on peer examples in other cities where the spacing of the frequent network was as close as 400 metres in denser areas. The routes encompassed mainly the central areas of the city.

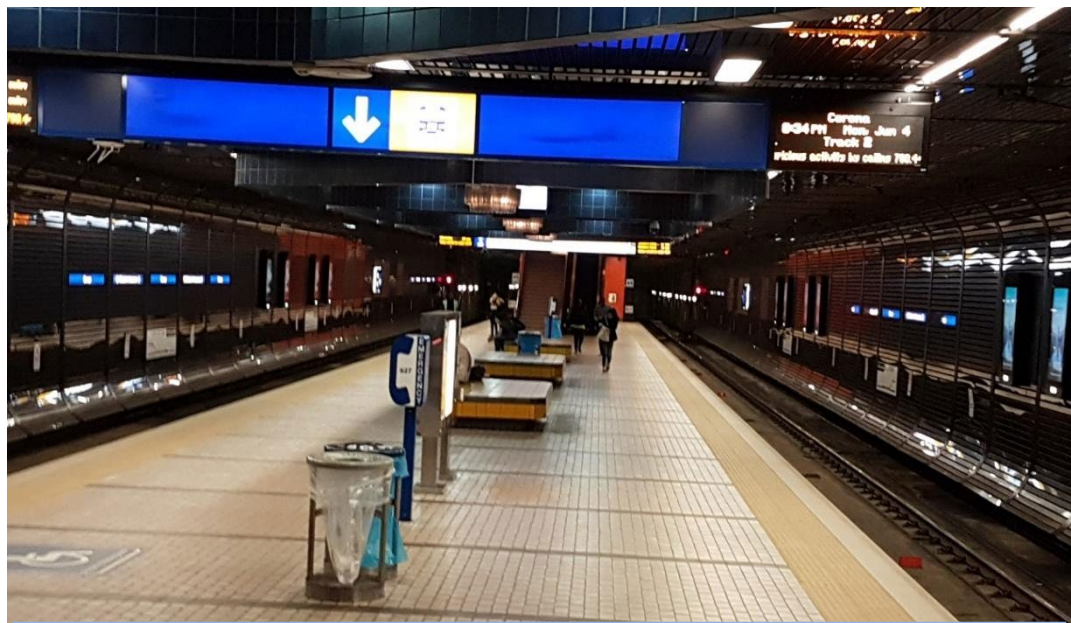
- **Limited Stops.** These are limited stop routes, serving transit facilities, mass transit stations, activity nodes and other transfer points. They function as feeder routes but also support corridors. Buses on these routes are often larger and while they may operate in mixed traffic they run faster than typical buses because of the stop spacing. They are also sometimes sped up by providing transit priority measures (including HOV lanes, dedicated transit lanes, queue jumping) in busy corridors where these routes operate.
- With the introduction of electronic fare collection to the ETS (SmartFare), all-door boarding will be theoretically possible on all transit routes, assuming each bus doorway would be equipped. Many transit operators around the world have tested their own local set of policies and customer service approaches to this option, often with a pilot phase followed by selective deployment. This usually occurs on higher-volume bus routes (and rail-based services if not already in practice). Limited stop and semi-exclusive bus operations usually benefit more from allowing use of all doors to reduce dwell times at busier stops. Over time, ETS may elect to apply this on other or all routes as well.
- **Semi-exclusive** - The network includes five semi-exclusive transit routes (red on the map). The transit vehicles on these routes can operate at the full posted speed of the corridor between traffic signals, as they run in dedicated/segregated lanes (or on tracks), and are not in mixed traffic. They do cross other traffic at intersections; however, these services are often sped along by transit priority measures and by having off-vehicle fare payment at the platform, to reduce dwell times. The latter may be facilitated with the introduction of Smart Fare. The mass transit network includes the following semi-exclusive routes:
 - A north-south route running between Castle Downs and Century Park District Nodes. This would use dedicated ROW (except for strategic segments where Bus/HOV lanes could be more appropriate) and would include a new direct connection (bridge) across the river between Downtown and Whyte Avenue.
 - An east-west route operating between West Edmonton Mall/Misericordia Major Node and Bonnie Doon District Node. This would include a new direct connection (bridge) across the river west of the University.
 - Three routes using a mix of dedicated and shared lanes in the north and west (B4), south (B5), and southwest (B6) parts of the city. Each of these connects to the other mass transit lines (such as the LRT lines) in at least two places. Where these operate in shared lanes, the design would be context-sensitive, and transit priority measures would be applied to produce fast travel speeds.
- **Exclusive ROW** – The network includes four exclusive transit routes encompassing mainly current and proposed LRT alignments and extensions (green) and a proposed airport connector (purple). Transit vehicles may operate at the full posted speed of the corridor between traffic signals, as they run in dedicated lanes or on tracks and are not in mixed traffic. A combination of infrastructure upgrades (grade separation) and technology (pre-emptive and priority signalling) are used to cross at traffic intersections. These services have off-vehicle fare payment at the platform, to reduce dwell times. The mass transit network includes the following exclusive ROW (as defined in this report) routes:
 - Capital Line LRT operating from Heritage Valley Major Node to the Edmonton Energy and Technology Park.
 - Valley Line LRT operating from Lewis Farms to Ellerslie.
 - Metro Line LRT operating between Campbell Road (St. Albert Park and Ride) and South Campus. The mass transit network assumes measures such as

grade separation are in place to permit 24 trains per hour, per direction, to cross University Avenue. (This extension adds service capacity at the busiest point in the LRT system and is discussed later in the report)

- **The Airport Connection** is assumed to operate between a grade-separated station downtown – with walk connections to mass transit lines nearby – and an elevated station at the airport terminal entrance. This line is proposed to ultimately follow the CP railway corridor and remain east of Calgary Trail/Gateway Boulevard until near the Airport. Intermediate stations would allow for connections to other bus routes. Of special note, stations would be included at 23 Avenue and Whyte Avenue. (Alternatively, this service may evolve into a semi-express)
- **Regional bus services** were carried over from the future base, representing future versions of existing services. Three new express services have also been defined based on future demand patterns. Two connect the Sherwood Park and Bremner areas to Exhibition District Node and Gorman; and a third running on 50 Street, connecting Exhibition District Node and Beaumont. Several other regional connections to Stony Plain/Spruce Grove, Fort Saskatchewan, St. Albert and Leduc have also been identified.

In addition to the services identified in the ultimate mass transit network, local and other regional transit services within Edmonton and in the surrounding municipalities were considered as part of this study. These were carried over from a future base scenario, with some adjustments to service levels to meet projected future demands. Routes in this group would provide first-last mile and connective functions to local destinations that are not situated in the major nodes and corridors and therefore not part of the mass transit network.

Please note that the route naming system used for the planning of the **Ultimate Mass Transit Network** uses conventions from the planning and consultation stages of the **Bus Network Redesign** (e.g. F1, N1, E1). This continues through the report for ease of comparing proposed transit routes at different future planning horizons. Since a numbering system has recently been created by ETS for the routes in the Fall 2021 service plan, those ETS route numbers are cross-referenced in later sections of this report.

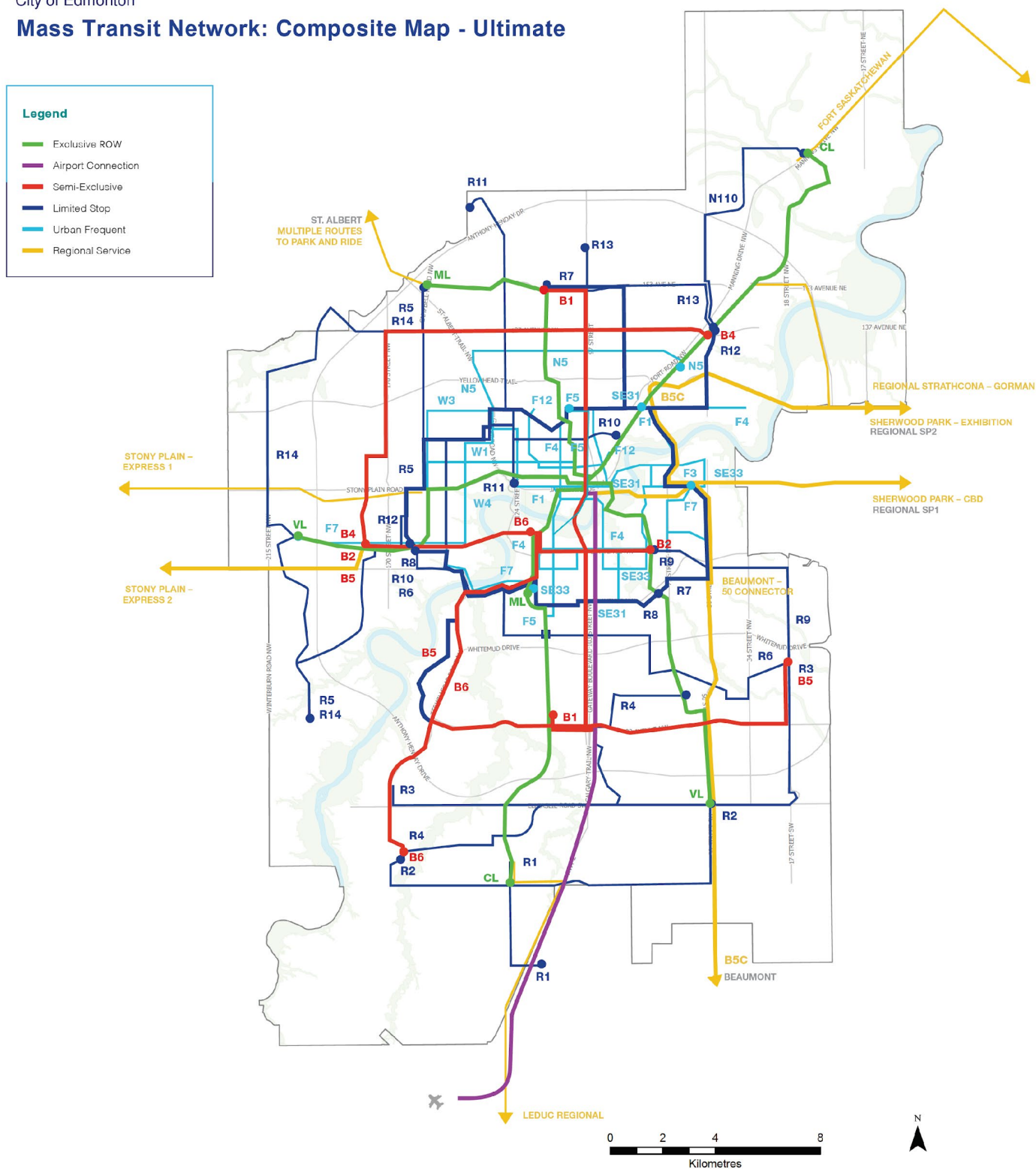


Platform at Corona LRT station, on the Capital and Metro Lines.

Exhibit 2.1: Map of Edmonton Mass Transit Network (MTN) for 2 Million Population

City of Edmonton

Mass Transit Network: Composite Map - Ultimate



2.2. Interim 1.5 Million Network Assumptions

While the focus of this report is the network analysis for the 1.25 Million population horizon, defining a reasonable network assumption for 1.5 Million was an important building block, as it represents a potential “halfway point” between the near-term (2021) network and the Ultimate Mass Transit Network for 2 Million residents.

With the understanding that approximately half of the infrastructure and service levels would be in place, there were several major inputs considered in developing the network. These included:

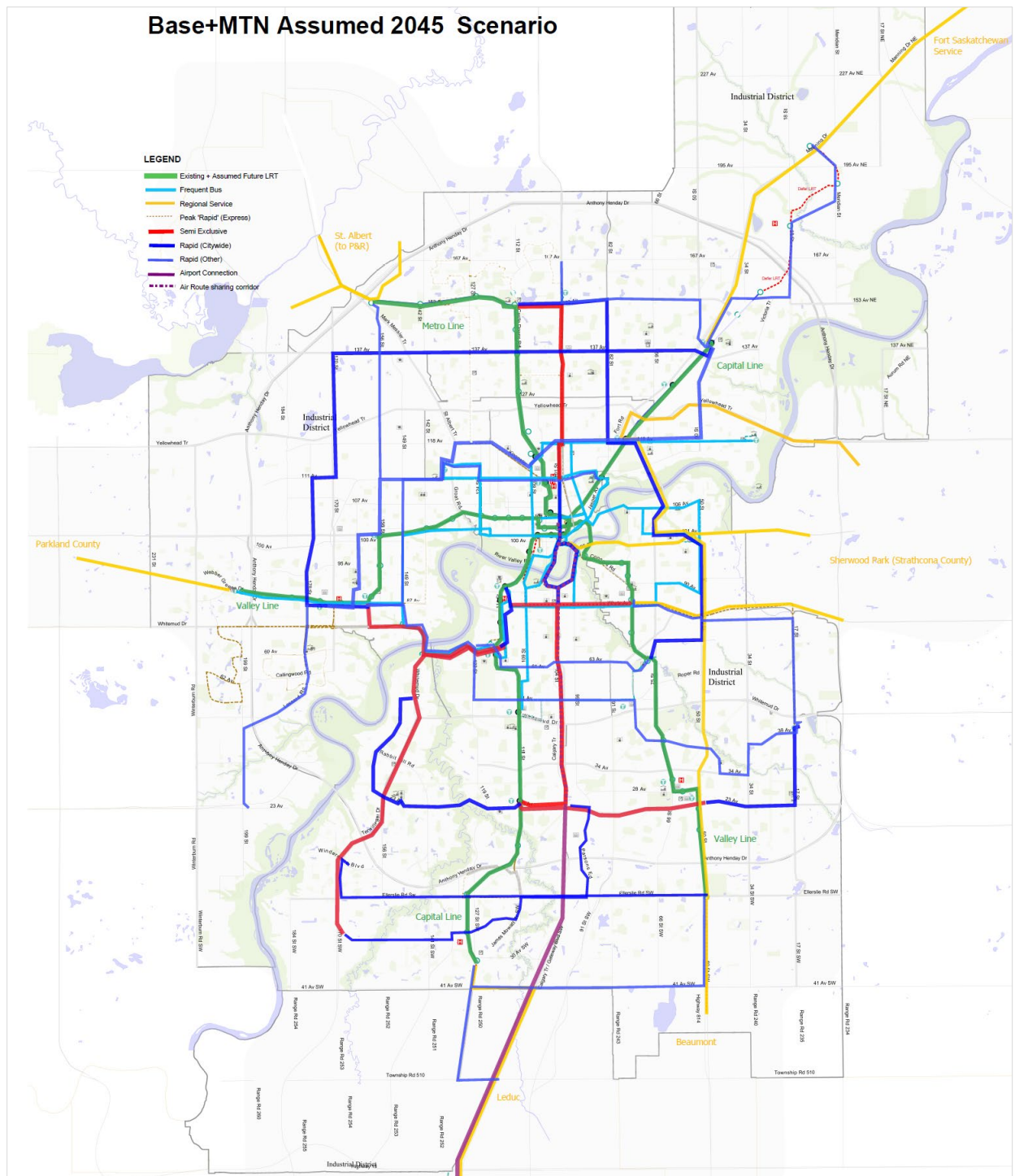
- City Plan interim growth targets at 1.5M population horizon, as allocated to modelling zones;
- The City Plan Implementation Staging;
- Hypothetical demand estimates (testing the Ultimate Mass Transit Network against the 1.5 M population to see where demand emerges sooner); and
- Potential to phase in service types and increase frequency over time.

Exhibit 2.2 illustrates the 1.5 Million network, representing an initial projection of which new transit services would be implemented by a 2045/2050 time frame. This is significant for the 1.25 Million network since any routes not assumed for 1.5 Million are less likely to be included in the 1.25 Million network.

Some of the major assumptions reflected on the map include:

- Metro Line extended northwest to Campbell Road;
- Valley Line completed;
- Capital Line extended southwest to the Heritage Valley Major Node. A future extension to Allard/Desrochers is assumed to depend on growth sometime after the 1.5 Million threshold. The planned extension northeast to Energy Park is also deferred, since much of the development (including parts of Horse Hills) that would support such an extension is now planned to occur post-1.5 Million.
- Frequent bus services carried forward from today; with additional routes outside the specific category also increasing in frequency where warranted by density and demand;
- Regional services being provided by the RTSC and/or surrounding municipalities, depending on how those services are structured in the future. (Any decision on this is outside the scope of this current study.)
- Implementation of major north-south (B1) and east-west (B2) semi-exclusive transit routes to add capacity to the network. Due to uncertainty over feasibility and timing of new river crossings, these routes would borrow from existing crossing capacity.
- An Airport Connector service from downtown, but likely as a highway-based connection, or if rail, using existing rail corridors and deferring construction of a new river crossing;
- Completion of the Terwillegar bus lanes and operation (as B6) from the southwest corner of the city to the University Station area;
- Operation of an east-west crosstown B5 service, with the busiest portion on semi-exclusive right of way. The rest of B5, and the B4 crosstown route in the north and west parts of the city, would operate as rapid bus with conversion to follow later.
- Many of the proposed rapid bus lines in the ultimate network would start operations, but at frequencies matching demand at the 1.5 Million population threshold. In more mature areas these services would operate more frequently and in newer areas the emphasis would be on introducing a fast variant of bus service at a more modest frequency to begin with.

Exhibit 2.2: Edmonton Assumed Interim Transit Scenario – 1.5 Million Population Stage



2.3. City Plan Interim Target Growth Distributions for 1.25 Million Horizon

Exhibits 2.3 and 2.4 illustrate the target distributions of total population and employment by model zone, as allocated for an interim growth target of 1.25 Million population in the city, and employment of approximately 700,000. The City Plan's anticipated growth at this horizon is estimated to have 65% of new dwelling units in the developing area with 35% in existing areas.

The areas with existing and planned development are the focus for the transit service proposals in the rest of Section 2. Most elements of the longer-term network south of 41 Av SW or in the Horse Hills and Riverbend areas are not required within the shorter timeframe.

Exhibit 2.3: Edmonton City Plan Target - Total Population Distribution for 1.25 Million Population Horizon

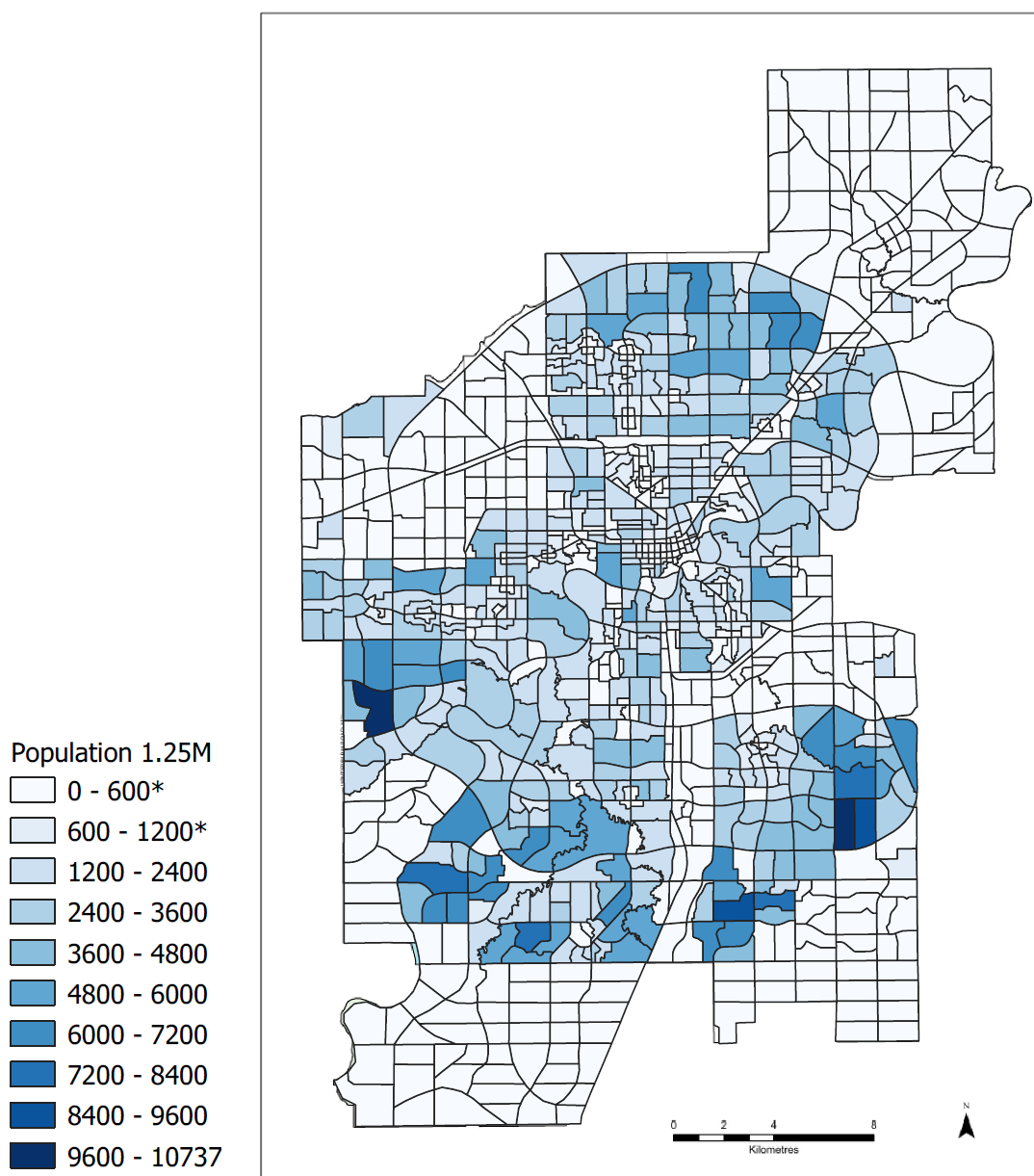
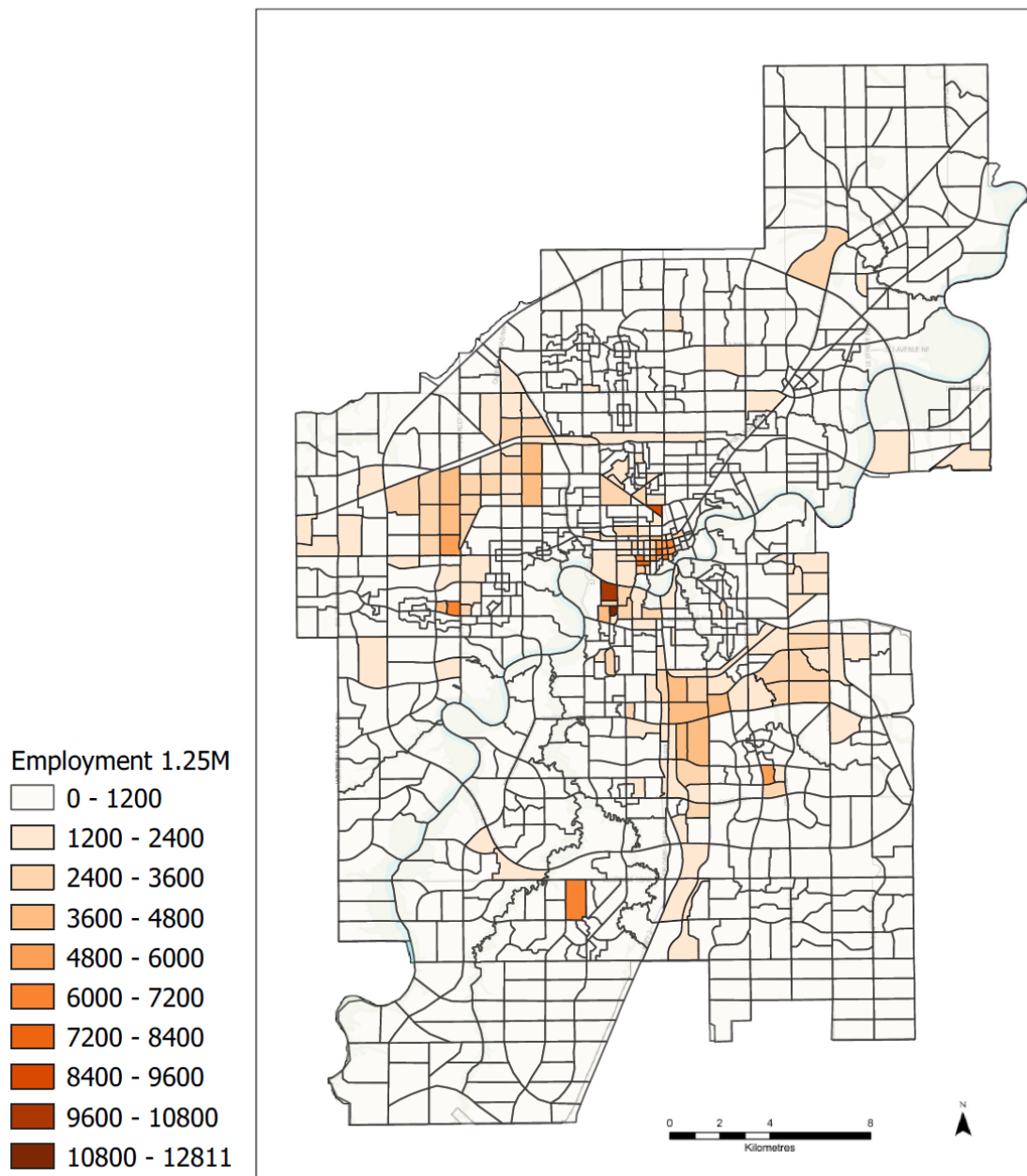


Exhibit 2.4: Edmonton City Plan Target - Total Employment Distribution for 1.25 Million Population



A caution: Due to the modelling zones being of unequal sizes, the colour scale represents absolutes per zone rather than density. Therefore, some neighbourhoods comprised of many smaller zones on the map are more built up (particularly for population) than the colours suggest. Refer to Appendix A for a dot density map, which demonstrates that most large outer zones are of similar density to many established areas – for this planning horizon.

2.4. Base Scenario for the 1.25 Population Horizon

The 1.25 million (2030 for modelling purposes) Baseline includes:

- The **Bus Network Redesign** (BNR) network is included, plus future extensions of service into anticipated growth areas up to 1.25 Million. Consistent with 2021 plans, this future version of the BNR system also includes several types of services: Frequent, Crosstown, Rapid (all-day and peak-only), Local and Circulator routes.
- The **Frequent services** from 2021 (F1 to F9, also referred to as ETS routes 1A through 9) continue in the future base. Some of these services are assumed to operate every 20 minutes in the off-peak, and it would be expected by future horizons that these would be 15 minutes or better. Peak service is typically every 15 minutes or better.
- The **all-day rapid services** in the BNR (E1 and E2, or ETS routes 110X and 120X), continue into the 2030 base. These routes connect downtown to Eaux Claires (via 101 and 97 Street) and a second route from downtown to the Castle Downs area (via 109 Street, then 97 Street). The segment of 97 Street north of 118 Avenue has peak-period bus lanes in place. Peak-only rapid services were as defined by ETS, and connect outlying parts of the city with downtown or intermediate LRT stations.
- **Terwillegar bus lanes** (providing an early version of proposed route B6, on a semi-exclusive alignment). In the base scenario, a pair of bus routes operates between Ambleside and South Campus Station, and use the bus lanes on Fox Drive.
- Modifications to some bus service headways for Edmonton routes were modelled to provide a better demand to capacity balance (based on unconstrained demand versus constrained capacity of the assumed LRT and bus services).
- Several routes were added to the model to address capacity pinch points in the system identified through demand model tests by forecasting staff. The addition of these routes to the base assumption was confirmed with the project team. These included:
 - A frequent shuttle between the Mill Woods LRT /TC and a planned park and ride at 50 St and Ellerslie SE.
 - Frequent service on Ellerslie Road between Mill Woods, the Heritage Valley park and ride/LRT at Ellerslie SW, and Ambleside.
 - Peak-only relief service from Century Park to downtown using Gateway Boulevard/ Calgary Trail and the existing river crossings.
- **LRT network** expansion is assumed to continue, with service as follows:
 - Capital Line LRT extended from Century Park to Ellerslie SW
 - Metro Line LRT extended from NAIT to Blatchford
 - Valley Line LRT operating from Lewis Farms to Mill Woods.
- **Regional services** based in the surrounding municipalities, including St. Albert, Fort Saskatchewan, Sherwood Park, Beaumont, Leduc County (Nisku), Devon, Leduc, Parkland County, Stony Plain and Spruce Grove. In all future scenarios, the assumed regional routes are subject to change once the RTSC agrees on and adopts a future service plan.

Exhibit 2.5 shows the assumed LRT (dark green), regional routes (yellow), frequent bus (turquoise), and peak rapid express routes (brown) that form the backbone of the future base transit network. In addition, the entire built-up area of Edmonton (by ~2030) and the surrounding municipalities is served by local routes and regional connections. These routes were considered as part of the modelling analysis but are not shown in detail by the exhibit.

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2.5. Opportunities and Constraints

The Edmonton Transit Service (ETS) and LRT Expansion & Renewal departments were consulted to gain an understanding of the near- to medium-term opportunities and constraints for the transit system. The intent was to confirm what proposals and plans were already in place to expand service, and how the mass transit elements might form a part of those plans. In several areas, there were questions as to what order certain elements would be implemented, due to financial and technical constraints.

Capital Line Extent

In 2020, Council directed staff to prepare a business case for the extension of the Capital Line south from Century Park to the Ellerslie (SW) Park and Ride location. This is included in the Baseline and both options. A further extension to Heritage Valley Major Node, which would also include a station at the SW Hospital, is under consideration and could potentially be implemented in the next 10 to 15 years.

There is some impetus to extend beyond Ellerslie to the SW Hospital by 1.25 million, since it is expected to open by then. A more logical interim extension would take the line to Heritage Valley Major Node, which would provide a better location for a transit centre, and would support surrounding development. Funding has not been confirmed for this extension. The ultimate terminus of the Capital Line is at Allard/Desrochers, which will be triggered by future development of lands south of 41 Avenue SW, expected to occur by the 1.5 Million growth horizon (or later).

Extensions northeast to Gorman and beyond are not as high on the LRT priority list and not expected by the 1.25 Million horizon; this is also consistent with planned land development in the northeast being at a slower pace than the southwest.

Any Capital Line extension may produce two pressures on the system: 1) equitable distribution of investment throughout the city; 2) peak demands along the Capital Line, specifically on the segment of the line between South Campus and Health Sciences stations. There will be a need to further evaluate the best solution to Capital Line capacity issues – refer also to the discussion of capacity issues on the following pages.

Capital Line Infill Stations

There has been past discussion of interim ‘infill’ stations being constructed along the existing Capital Line to provide better access to areas that may start to develop in the planning horizon and are worth testing now to gain insight. Examples of these stations include the 92 Street area (midway between Churchill and Stadium stations) and at 40 Ave NW (the ‘Harry Ainlay’ location between Southgate and Century Park). There may also be interest in other locations at a future time, such as a ‘south Exhibition lands’ station; if this were to proceed, the concept would be developed in accordance with Exhibition Lands Planning Framework.

Metro Line Extent

Over the longer term, construction of the Metro Line northwest to Campbell Road is one of the priorities for LRT implementation, once funding becomes available. The line is assumed to be completed at some time prior to the 1.5 Million horizon. Council has identified this line as the next priority following the extension of Capital Line south.

Currently, the next major LRT project is the westward extension of the Valley Line, which has commenced the design and construction stage. The Valley Line West is assumed to be completed by the time of the 1.25 Million growth horizon. It was assumed to be less likely that the Metro Line could also be completed all the way to its planned terminus (at Campbell Road) within 10 to 15 years.

Phase 1 construction to build a new station at Blatchford and construction of the permanent NAIT station have commenced. Therefore, the next extension of Metro Line would be a new

bridge over the Yellowhead Trail and CN Calder railway yard as part of Phase 2, which would take the Metro Line as far as Castle Downs. This has been identified as a next priority for LRT extension by Edmonton City Council. This bridge was estimated to have a capital cost of over \$200 Million, and a detailed design and final agreement with CN would be required to proceed. The third phase will extend the line to Campbell Road.

Valley Line Extent

The SE portion of this route is planned to open in 2021, as far as Mill Woods. Proposed extensions beyond this to Ellerslie Road are at the concept level only and not identified as a higher priority at this time. As noted above, the western extension of Valley Line to Lewis Farms is the next major LRT project. Design is currently underway with construction expected to soon.

Capacity Constraints on LRT

The LRT system's capacity depends on several factors including the size of the vehicles, and the frequency at which they can operate. In turn, the practical size and frequency of trains usually depends on the size of the stations, the power and signal systems, and safety considerations.

Platform lengths at the stations limit the length of high-floor LRT trains on the Capital and Metro Lines. Extending tunnel stations would be particularly expensive and a more practical way to increase capacity would be to tighten the frequency between trains on the combined routes.

Within the tunnel, the primary constraint is at the junction point of the two routes immediately north of Churchill Station, due to safety requirements for separation between trains. It is expected that more trains per hour will be operable in the future with signalling, communications and control upgrades.

The governing limitation on LRT capacity is currently at the grade crossings, where it is considered impractical to operate more than 12 trains per hour in each direction. Otherwise, impacts to other traffic and pedestrians would exceed local acceptance. Operational review is required to test near-term approaches that might trade off operating speeds and dwell times to make a higher frequency practical. A longer-term approach would be to grade separate any critical locations to permit more trains per hour. The location at University Avenue/114 Street is the most significant currently, as it is the peak load point on the LRT network and the place most in need of more capacity, which depends on headway and train size. In the future, trains on the Metro Line will be the same as the Capital Line (5 cars) and headway will remain as the limiting factor.

The assumed design capacities (refer to glossary) are 9,000 per direction for the Capital Line; 4,500 for the Metro Line; and 5,400 for the Valley Line.

Bus Fleet Reallocation and Expansion

Current planning indicates that over the next 10 to 15 years, approximately half of all fleet purchases will be replacing older vehicles, while the other half will be to address headway maintenance and allow for service expansion. Some near-term pressure on the size of fleet will be alleviated by reallocating service to the Bus Network Redesign (BNR) structure when VLSE starts operating in 2021.

An expanding fleet needs new bus garages, with a new garage planned for 2026-7 to accommodate 350 buses. The next garage after that would be needed in 2033, which coincides approximately with the 1.25 Million population horizon. Allocations of buses are expected to be shuffled among existing and new garages, so there is room for growth in each area of the city.

Terwillegar/Whitemud Bus Lanes

Terwillegar is a related project that is proposed to transition towards BRT. The alignment was initially assumed to be a combination of Whitemud/122 Street and Fox Drive, possibly one-way

on each leg. However, with recent funding announcements, these assumptions may need to be revisited and an alignment using only Fox Drive is more likely.

2.6. Mass Transit Options for 1.25 Million Horizon

Options A and B overlay elements of the emerging Mass Transit routes on top of the 2030 base, with some variations in the specific elements to test the response to different infrastructure and service investments. The rationale for these major elements follows these summary listings and reference maps.

2.6.1. Option A

- BNR bus route structure
- Route B6 (the Terwillegar BRT), extended from South Campus to University LRT station.
- Capital Line LRT further extended beyond Ellerslie Road to Heritage Valley Major Node
- Introduction of routes B1, B2, B4, and part of B5, mostly as rapid bus, but with several segments using dedicated lanes
- New rapid bus services B5C, R3, R6, R7, R12, and R109
- A 'ridership builder' local connector (RB2), anchored by the Heritage Valley LRT station at one end, and the Mill Woods LRT station at the other end.

Exhibit 2.6 shows the route structure for the major elements of Mass Transit 'Option A' for the proposed 1.25 Million horizon, referred to as a nominal '2030' modelling horizon.

2.6.2. Option B

- BNR bus route structure
- Route B6, extended from South Campus to University
- Metro Line LRT further extended to Castle Downs (testing the Metro Line Phase 2 extension to assess its effects)
- Infill stations tested on Capital Line; without any extension of the line
- Introduction of routes B1, B2, the short version of B5, and a greater amount of dedicated bus lanes than in Option A
- A shorter version of route B4
- New rapid bus services B5C, R3, R9, and R12
- A 'ridership builder' local connector (RB5), anchored by the Lewis Farms LRT station at one end, and the West Edmonton Mall LRT station at the other end.

Exhibit 2.7 shows the route structure for the major elements of Mass Transit 'Option B'.

Exhibit 2.6: Edmonton Future Mass Transit for 1.25 Million Horizon – Option A

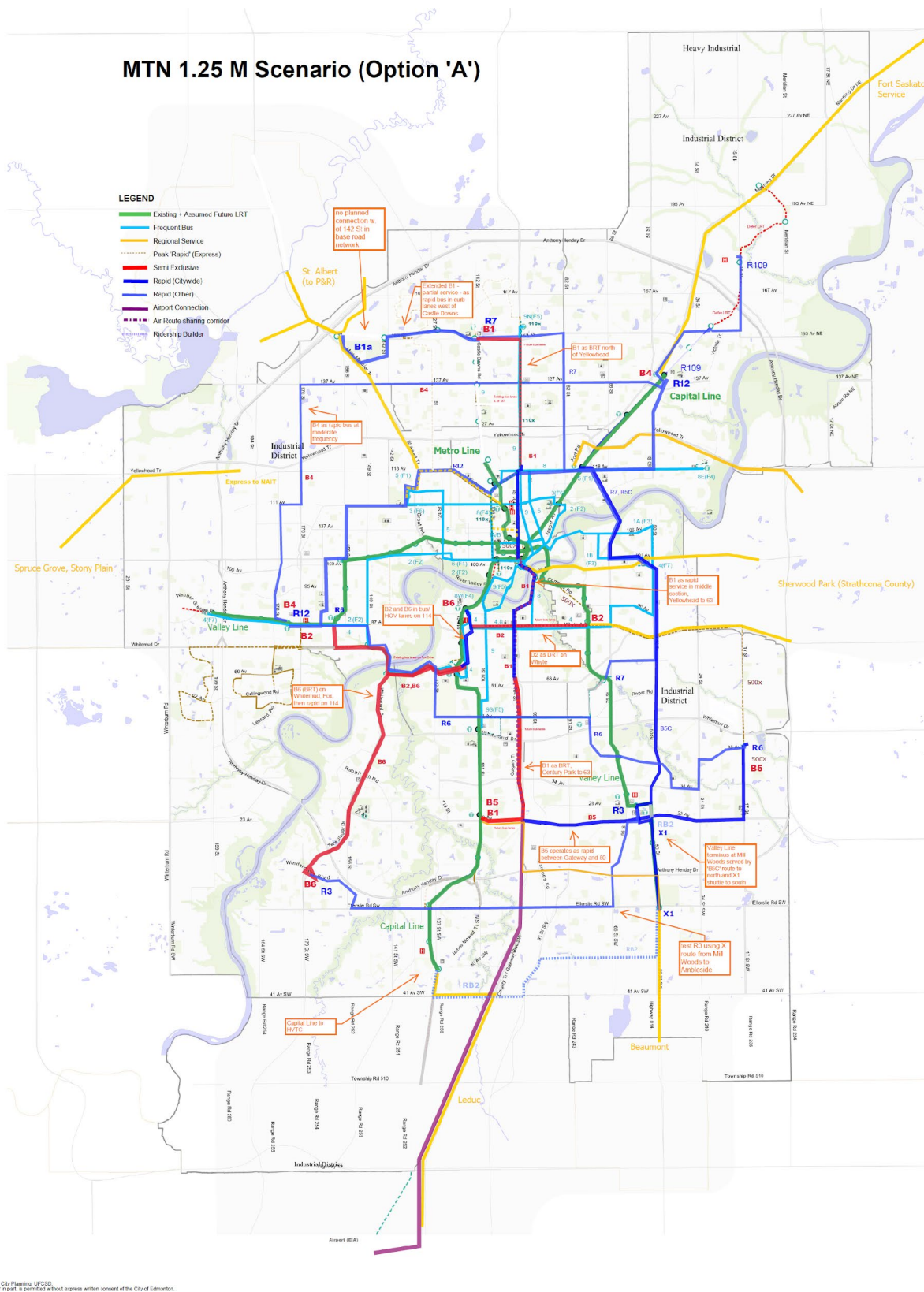
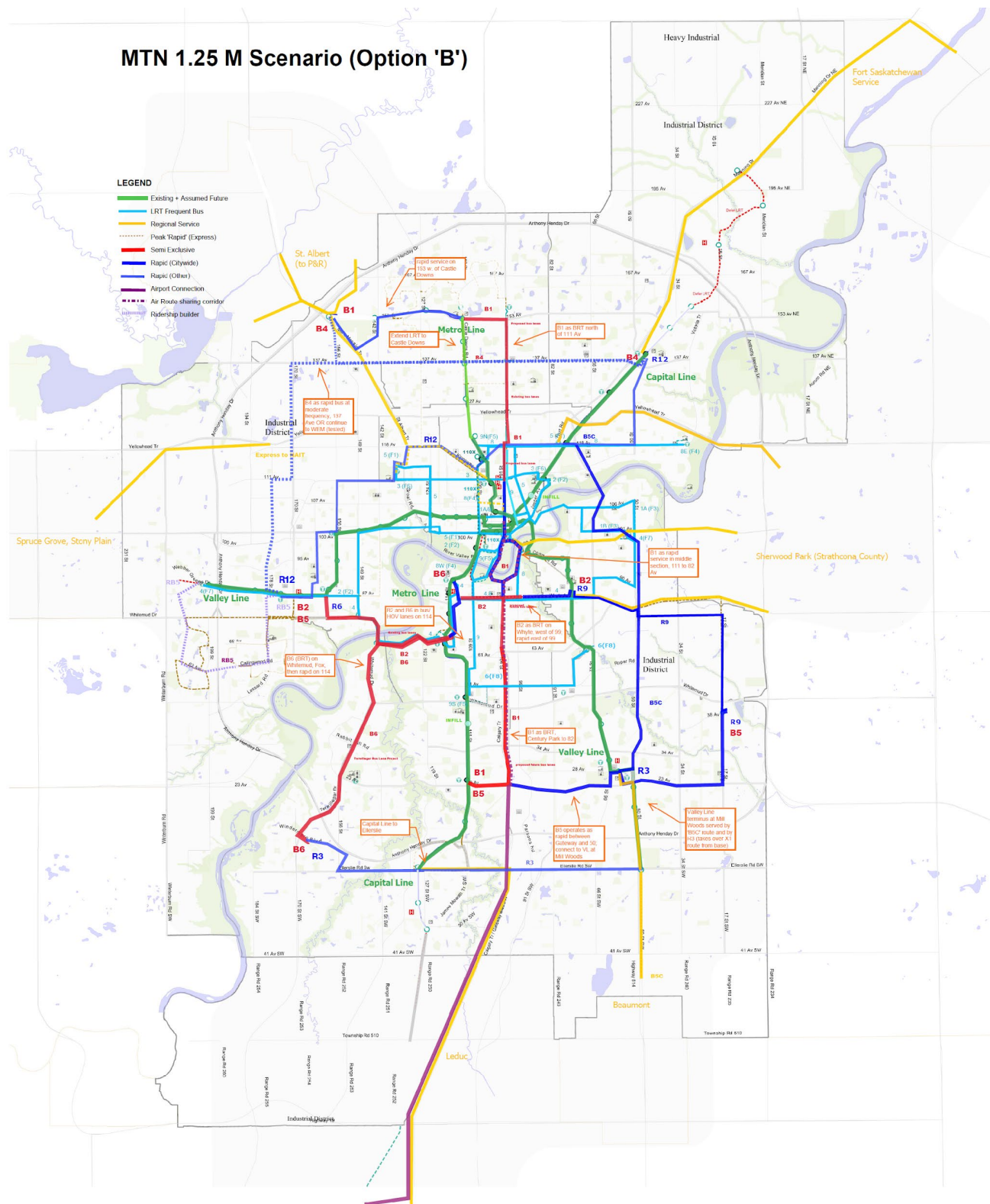


Exhibit 2.7: Edmonton Future Mass Transit for 1.25 Million Horizon – Option B



2.6.3. Options Being Tested by the 2030 modelling Base, Options A and B

The differences between Options A and B and from the 2030 modelling baseline reflect several factors:

- The expected staging of population and employment growth;
- Interpolation of additions in service between today and the 1.5 Million horizon that was previously defined;
- The constraints, challenges and opportunities identified by stakeholders;
- Opportunities to test different combinations of routes to see what the costs and benefits are projected to be. This will allow the team to propose a hybrid of the Base, Option A and B as the staging recommendation once analysis has been carried out.

The following points provide an overview of the rationale for Options A and B.

Capital Line Extent. An extension of the Capital Line south from Century Park to the Ellerslie (SW) Park and Ride location is included in the Baseline and both options. A further extension to Heritage Valley Major Node, which would also include a station at the SW Hospital, is under consideration and could potentially be implemented in the next 10 to 15 years. This potential extension is included within Option A. It is not included in Option B, which addresses other potential LRT modifications.

Capital Line Infill Stations. Examples of these stations include the 92 Street area and at 40 Ave NW. Given that Option A already includes an extension of the line, the effect of adding these stations is expected to be more apparent if analyzed as part of Option B.

Metro Line Extent. The baseline and both options include an extension to Blatchford and construction of the permanent NAIT station. The next logical extension would be a new bridge over the Yellowhead Trail and CN Calder railway yard. Similar to the 2030 base, Option A will terminate at Blatchford. Option B will test an extension as far as Castle Downs/153 Avenue as a potential next segment.

The 153 Avenue corridor would be served by rapid bus services prior to completion of the Metro Line. For passengers at Campbell Road, both Options A and B would provide B1 connecting service, with a higher frequency provided by Option B in anticipation of greater demand (since it would also be possible to transfer to the Metro Line at Castle Downs).

LRT Frequencies and Capacities. The Capital and Metro Lines will continue to deploy high-floor LRT, which has longer trains, and a higher per-train capacity. The Capital Line is assumed to operate every 5 minutes in both directions during peak periods. Due to existing operational challenges – including overlapping use of alignment between Churchill and Health Sciences - and lower passenger loads, the Metro Line is assumed to operate every 10 minutes during the peak. By the 1.25 Million horizon, the Capital Line and Metro Line are assumed to have five (5) cars per train.

The Valley Line will use low-floor LRT that can be more directly integrated in urban streets, and will have shorter trains. It is also assumed to operate every 5 minutes during peak periods. Valley Line trains are assumed to operate with two (2) cars per train.

The off-peak frequencies are less than the peak: 10 minutes for Capital Line and Valley Line, and 15 minutes for Metro Line.

Semi-Exclusive Routes. The grouping of routes B1 through B6 fall into this category. For the planning horizon, only partial implementation of semi-exclusive right of way is assumed, with differences between all three scenarios.

- **B6.** This route includes the planned bus lanes on Terwillegar and consequently, a shortened variant of this route, running from Ambleside to South Campus, is effectively included in the baseline. For both Options A and B, the route is extended north to University LRT station using 114 and 112 Avenues without dedicated lanes (operating in mixed traffic for this time horizon).
- **B1.** This route extends from Century Park to the Campbell Road, with the segment west of Castle Downs operated as rapid bus. The route includes semi-exclusive lanes along its route to the north and south of the city centre. In Option A, these lanes are less extensive and would operate north of 118 Avenue and south of 61 Avenue. In Option B, they would be north of 111 Avenue and south of 82 Avenue, providing additional speed benefits. Both options expand on the existing bus lanes between 118 Avenue and 137 Avenue on 97 Street.
- The crossing of the North Saskatchewan River uses existing bridges. In Option A, NB and SB buses would use the Low Level Bridge. In Option B, NB will operate via Walterdale while SB will use Low Level. The distances are similar but allow a different combination of bus stops to be compared.

Several precursor rapid/express routes assumed in the 2030 base are modified for Options A and B. These changes include the replacement of 120X and CPCBD (Century Park-downtown peak-only) routes by the B1 route.

- **B2.** This route would operate between West Edmonton Mall and Bonnie Doon LRT station. In both options, it would use the bus lanes on Fox Drive, sharing this section with B6. Option A includes semi-exclusive treatment on 82 Avenue from 112 Street to Bonnie Doon, while Option B tests a shorter extent, from 112 Street to 99 Street, since 82 Avenue becomes more residential to the east.
- **B4.** This route runs from Clareview to West Edmonton Mall in Option A. Option B shortens the route and serves the busier part of the line on 137 Avenue only, and terminates at Campbell Road. In the 2030 horizon, this route uses existing lanes with some priority assumed, but is not a semi-exclusive operation.
- **B5.** Due to higher demands on the eastern portion of this route, an initial segment from Century Park to Maple TC is included in both Options A and B. The segment from Calgary Trail to 111 Street, shared with B1, would be semi-exclusive. The future western part of the B5 route (from 87 Avenue to Century Park) is also served by a crosstown route, which will have its frequency slightly increased to address peak demand.

Rapid Bus. The set of routes proposed for implementation focuses on those serving growth areas and corridors designated for investment in the 1 to 1.25 Million planning horizon. Details of the routes are indicated on the maps and summary table. In general, the frequency assumed in 2030 is less than the ultimate, since population and employment along most routes will be at an interim state, beginning to increase but not at the so-called 2065 levels.

- **R3** is included in Options A and B, and replace a frequent service identified in the refined base network, due to high demand on Ellerslie Avenue. Option A tests a direct replacement of the route from Mill Woods to Ambleside, which follows part of 66 Street.

In Option B, R3 follows 50 Street, also replacing some of the shuttle service between Mill Woods LRT and the Ellerslie SE Park and Ride. These two variations in R3 will have different operating costs and boardings.

- **R6** is a crosstown service from Meadowlark to Maple, including service on 51 Avenue. It is introduced as a medium frequency rapid bus to build ridership, in Option A.
- **R7** is another crosstown service, connecting Castle Downs, Exhibition LRT station, Capilano and Davies LRT station. It is being tested as an element of Option A. (It is not included in Option B, which instead sees LRT service to Castle Downs, and assumes more frequent service on route B5C on 50 Street as an alternative).
- **R9** provides a connection from Maple TC to Bonnie Doon LRT, with intermediate stops in the employment district. It is included as an element in Option B. The level of service on a parallel express route (500 X) is adjusted for Option B. 2030 Base and Option A assume route 500X only with no R9.
- **R12** operates between Clareview TC and West Edmonton TC, with connections to Exhibition LRT, NAIT, Westmount, and West Jasper Place. This route demonstrated some of the highest rapid bus demand in the ultimate City Plan network, and the interim 1.5 Million network, and so it is also included in Options A and B.
- **R109** is included in Option A in a truncated form to provide a connection from Clareview to the future Gorman station and Alberta Hospital station locations. This route is expected to become more significant by 1.5 Million, and it is included in Option A only, to assess its potential demand.
- **B5C – Edmonton Portion.** Options A and B include implementation of the B5C service from Mill Woods to Exhibition LRT via 50 Street, operating much like a rapid bus. The frequency of this assumed service is less for Option A, due to overlap with part of R7.
- In two emerging areas where future rapid buses are planned in later planning horizons, the ridership builder routes RB2 and RB5 (identified previously) are being tested to see how much demand there is by the 1.25 Million horizon. These are being operated similar to local routes for the 2030 scenarios.

Airport Connector. This service is included in both Options A and B, but with variations in travel time. It is assumed to follow Highway QE2 and then use the same route as B1 between 23 Avenue NE and downtown. The differences in the assumed extent of bus lanes for B1 would also affect the travel time of the AC service in Options A and B.

Frequent Bus. The frequent bus services largely come directly from the BNR and on the map and tables, the functional name used (e.g. F1, F4) is also accompanied by the proposed route numbering that ETS plans to use when the route restructuring is implemented in 2021. In Options A and B, some of the frequent routes carry forward as assumed in the base (e.g. 1A, 1B, 2), where no semi-exclusive or rapid service is being introduced. Other routes (e.g. 4, 5, 6) assume a modest reduction in local service frequency in Options A and B, where some of the demand would be picked up by proposed new routes in the same corridors.

Regional Bus. These are largely carried forward from the revised '2030' base without further modification. A previous memo identified the refinements made to ensure the current RTSC proposals for regional coverage were reasonably reflected in the travel model.

2.6.4. Bus Lanes and Transit Priority

The semi-exclusive routes noted above proposed to evolve over time, with some segments operating in mixed traffic with spot treatments to address delays, segments with dedicated bus lanes in peak periods, and other areas where the transit service would eventually be segregated except at intersections. For the early horizon of 1.25 Million, portions of B1, B2, B4, B5 and B6 will operate more like rapid bus, with limited stops and some strategic use of transit priority at delay locations. There are also areas in the 2030 Base, Options A and B where existing (2020) bus lanes continue to operate and new ones are assumed or proposed.

The bus lane elements in the **Future Base Scenario** include:

- Peak direction bus lanes on 97 Street between 118 Avenue and Yellowhead, SB from 135 to 125, and NB at 137 into Northgate TC. There is also a peak direction lane reversal south of Yellowhead Trail. (Used by BNR routes and by B1 in options A and B)
- A combination of NB bus lanes on 109 Street operating in peaks and all day. (Used by BNR routes)
- Bus lanes on Fox Drive and connecting through to South Campus. (used by BNR routes, the SWBRT in the base scenario, and B2 and B6 in Options A and B)
- Peak period bus lanes on Jasper Avenue between ~120 Street and ~110 Street.
- Bus lanes on Whitemud and Terwillegar Drive between Fox Drive and Windermere Blvd (used by the SWBRT in the base scenario and by B6 in Options A and B).
- Several dedicated bus lanes on various downtown blocks – because of high volumes of buses stopping – and at approaches to various transit centres around the city.

These elements are the starting point for Options A and B. **Both options include:**

- Peak direction, peak period lanes extended on 97 Street to Eaux Claires TC, converted from existing lanes;
- Bus lanes added to 153 Avenue from just east of 97 Street to Castle Downs;
- NB bus lane converted from an existing lane on Gateway Boulevard, from 23 Avenue to 63 Avenue;
- SB bus lane conversion on Calgary Trail from 63 Avenue to 23 Avenue;
- Peak direction, peak period bus lane on 82 (Whyte) Avenue from 99 Street to 112 Street;
- Peak direction, peak period bus lane on Whitemud from 159 Street to Fox Drive; and
- Peak direction, peak period bus lane on 23 Avenue from Calgary Trail to 111 Street.

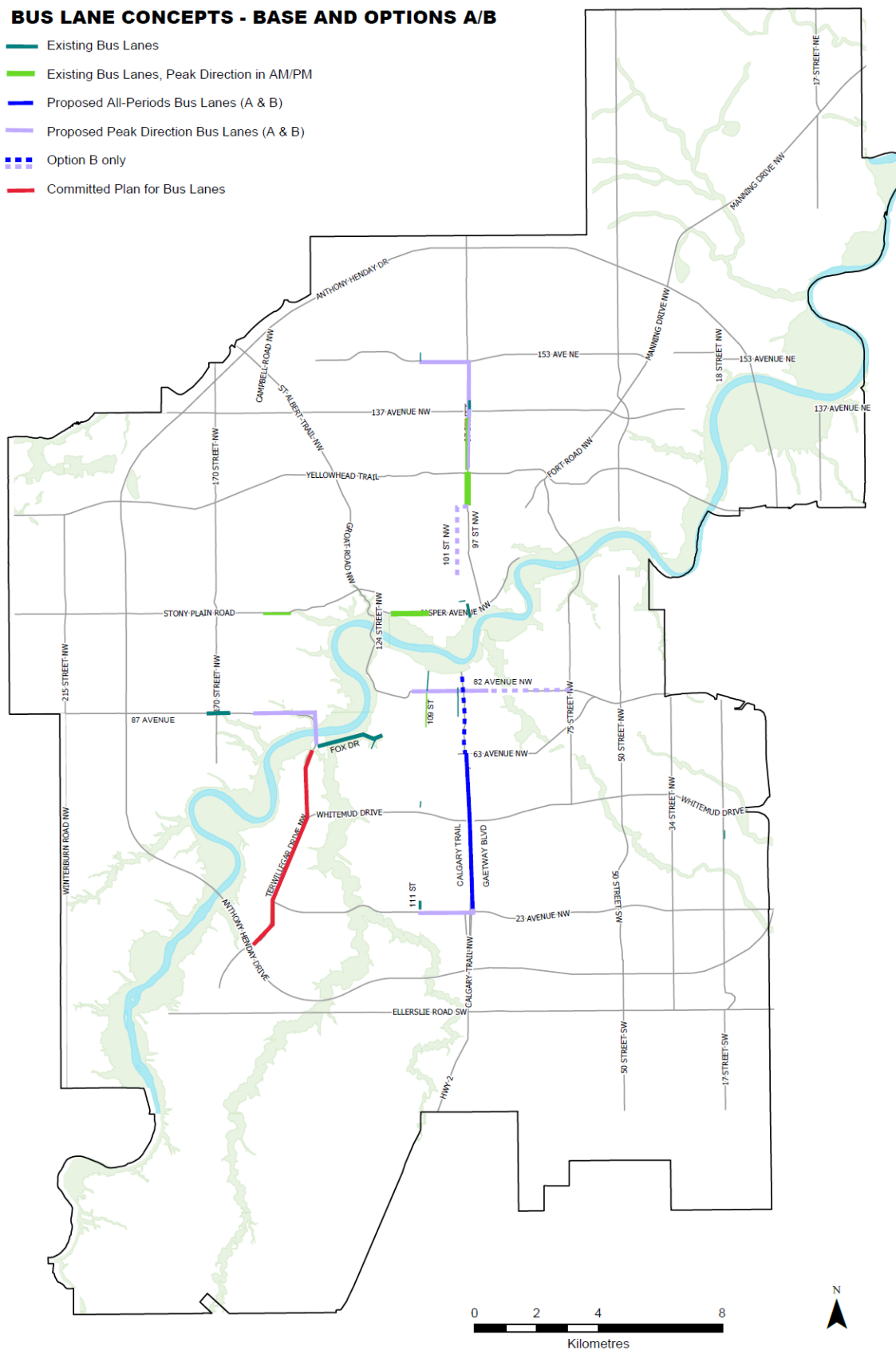
Bus lanes tested in the model generally assumed reallocation of existing street space rather than widening.

Option B extends several bus lanes further:

- Peak direction, peak period lanes on 101 Street, converted from existing lanes, from 118 Avenue to south of 111 Avenue;
- Peak direction, peak period bus lane on 82 (Whyte) Avenue from Bonnie Doon to 112 Street;
- Extended NB bus lane converted from an existing lane on Gateway Boulevard, from 23 Avenue to 83 Avenue; and
- Extended SB bus lane conversion on 104 Street and Calgary Trail from 83 Avenue to 23 Avenue.

The existing bus lanes and those proposed lanes tested in the model are illustrated conceptually in Exhibit 2.8.

Exhibit 2.8: Future Mass Transit for 1.25 Million Horizon – Proposed Bus Lanes



3. Network Options Performance

The ultimate mass transit network was developed in conjunction with the Edmonton City Plan, and as such, was intended to enhance future transit network performance in addition to several broader goals. These include supporting future land use plans and policies by serving and shaping travel demand, acting as a catalyst for development at nodes and corridors, and helping the city to be more sustainable (financially, environmentally and socially). The evaluation of interim options for 1.25 Million scenarios has been carried out to help prioritize elements of an incremental build-up of that long-term network.

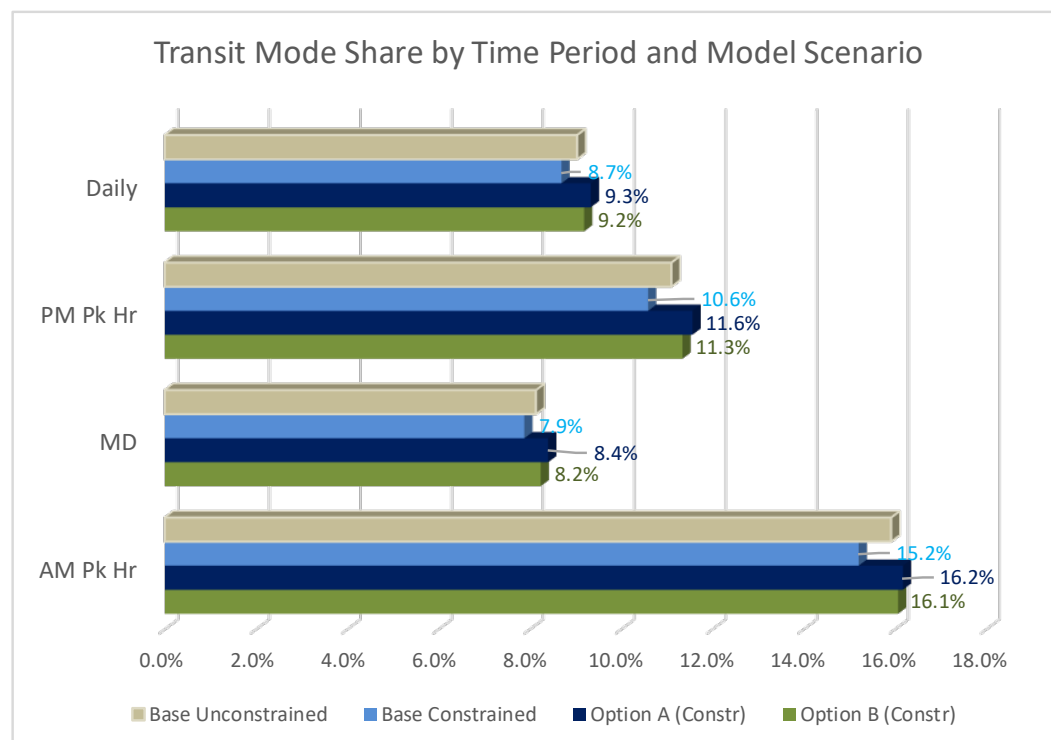
It is important to note that the demand modelling has been carried out using the City's calibrated travel demand model, which is partially based on the 2015 Household Travel Survey and on network-level counts of traffic and transit passengers. These trends were representative through to early 2020, prior to the pandemic. There is some uncertainty about the timing of future travel demand since there may be lasting legacy effects of the past year.

3.1. Transit Mode Share Comparison

The mass transit options are built upon the Base scenario with the objective of aligning with the land use patterns proposed for 2030 modelling base analysis. It is important to improve performance of the interim 1.25 M network options during the AM peak for work and school commute trips, in the midday for personal business, shopping and recreational travel, and in the PM peak for a broad combination of different trip purposes.

Exhibit 3.1 summarizes the mode choice results for the 2030 modelled horizon (used as the approximate time horizon to reach 1.25 million people) for two variations of the Base scenario, in addition to mass transit options A and B.

Exhibit 3.1: 2030 (1.25 M Population) Transit Mode Shares – Base Scenarios, Options A and B



The 'unconstrained' Base reflects potential demand for transit, whereas the 'capacity constrained' scenario reflects additional time transit passengers would require waiting for additional transit vehicles or taking different routes where on some routes, space becomes limited. This produces a lower level of ridership. Options A and B use the same constrained capacity, so the transit mode choice increases are relative to the Base constrained.

These results all reflect the mode choice for residents of Edmonton, as output by the regional demand model. Option A outperforms B, but this was expected as it contained a larger extent of mass transit routes. Both options increase transit mode choice relative to the constrained future base, because they add capacity and speed between key origins and destinations.

Transit Mode Share Compared to Recent Performance

The projected increases in future mode share include a 1% increase in each of the peak periods and 0.6% over the course of a full day when comparing the most robust mass transit option with the future base network. These percentages are for ALL trips in Edmonton. Focusing just on the implications for transit, these projected AM and PM increases would result in nearly one-tenth (9-10%) *more transit passengers* on ETS.

When comparing these results to recent transit usage (8.2 % in the 2015 travel survey), it is important to remember that the higher mode share is also based on a much higher population. Therefore, the mode share gains in the analysis indicate that the number of transit riders will not only have kept pace with growth of the city (nearly 30%) but also forecast to make additional gains, resulting in 50% more transit riders between 2015 and the 1.25 Million horizon

Mode Choice by Time Period

Exhibits 3.2 through 3.4 show the percentages of travel choice for transit and other modes of personal travel, for the AM peak hour, the average midday, and the PM peak hour. The auto mode share is expressed in terms of drivers and passengers. The transit share is split into 'walk access' (people board at a nearby stop or station, reached on foot) and Park and Ride/Kiss and Ride access (passengers drive to a parking lot near a transit stop or station, or are dropped off/picked up by someone).

- In the AM peak, the mass transit options can build on the base scenario, increasing mode share for transit from 15.2% to 16.2% (Option A) or 16.1% (Option B). This is the percentage of AM trips by city residents that select transit as the primary mode. The transit shares are highest in the AM peak because the focus of AM travel is work and school-related, which lend themselves well to transit.

Exhibit 3.2: 2030 (1.25 M Pop) AM Peak Mode Shares – Constrained Base Scenario, Options A and B

AM Peak Hr (7-8)	Driver%	Passenger%	Walk Access Transit%	PNR/KNR%	School Bus%	Walk%	Bike%
Base Constrained	58.7%	15.9%	12.3%	2.9%	2.9%	5.5%	1.9%
Option A	57.8%	15.8%	13.2%	3.0%	2.8%	5.6%	1.9%
Option B	57.9%	15.8%	13.1%	3.0%	2.8%	5.6%	2.0%

- In the MD typical hour, transit mode choice increases from 7.8% to 8.4%/8.2% for trips in Options A and B respectively. This increase reflects higher speeds provided by the additional services, which help to attract additional passengers relative to the Base. These trips appear to be drawn away from auto drivers and passengers.

Exhibit 3.3: 2030 (1.25 M Pop) MD Peak Mode Shares – Constrained Base Scenario, Options A and B

Midday 9 - 3:30	Driver%	Passenger%	Walk Access Transit%	PNR/KNR%	School Bus%	Walk%	Bike%
Base Constr	54.3%	21.0%	7.4%	0.4%	1.1%	14.3%	1.4%
Option A	53.9%	20.9%	8.0%	0.4%	1.1%	14.3%	1.4%
Option B	54.1%	20.9%	7.8%	0.4%	1.1%	14.3%	1.4%

- In the PM peak, transit mode choice increases from 10.6% in the Base to 11.6% in Option A and 11.4% in Option B. These all fall into a lower percentage range than in the AM, due to the number and complexity of trips being higher in the PM. The reverse commute from the AM is part of the PM pattern, but there are additional discretionary trips such as personal business and shopping, and commute times in the afternoon and evening are more dispersed due to school ending at a generally different time from the end of the working day. Auto passenger and walk trips both increase as a percentage of PM peak trips compared to the AM.

Exhibit 3.4: 2030 (1.25 M Pop) PM Peak Mode Shares – Constrained Base Scenario, Options A and B

PM Peak Hr (4:30-5:30)	Driver%	Passenger%	Walk Access Transit%	PNR/KNR%	School Bus%	Walk%	Bike%
Base Constr	59.1%	18.5%	9.1%	1.5%	0.03%	9.8%	2.0%
Option A	58.3%	18.4%	10.0%	1.6%	0.04%	9.8%	1.9%
Option B	58.4%	18.5%	9.8%	1.6%	0.03%	9.8%	2.0%



3.2. Fleet Requirements

Based on the estimated running times for the range of transit services, and the service frequencies at different time periods, one may estimate the number of buses and LRT trains in operation. ETS uses the AM peak to define the service fleet requirements for most routes, which combines the morning commute demand with school trips, resulting in the largest number of buses in service. Community circulator routes are an exception to this, and run more frequently in the midday.

Exhibit 3.5 shows the calculation for the size of the bus fleet based on the combined AM/MD peak vehicles, as described above. The numbers of buses vary between the base and options due to new services being added, and to replacement or reduction of some base services by the new routes. For the two options, the incremental number of buses is 60 to 95 vehicles more than the future base fleet.

Exhibit 3.5: Transit Vehicle Fleet - Buses - Constrained Base Scenario, Options A and B

SCENARIO	BASIC BUS REQT (AM PEAK)*	COMMUNITY BUSES (MIDDAY)	RED ('BRT')	TOTAL BUSES IN PEAK SERVICE**	TOTAL BUS FLEET	SPARES
BASE	832	12	15***	859	1075	216
OPT. A	848	12	74	934	1170	236
OPT. B	824	12	71	907	1135	228

Notes:

* AM Peak number = regular buses in peak service, 10% allowance for extra buses for school-related peak loads (this is in addition to the regular service one would estimate based on travel times divided by nominal headway), and rapid bus fleet.

**Includes buses estimated from modelled run times and headways, allowance for school services, and shuttle services (which are higher midday).

***SW 'BRT' using Terwillegar and Fox Drive bus lanes, is in the base network and counted as BRT.

In Exhibit 3.6, the numbers of LRT indicated are trains in service, then the totals with spares, and the resulting number of individual LRVs. For planning purposes, and for setting capacity in the demand model, 5-car high-floor LRT and 2-car low-floor LRT is assumed. A spare ratio of 25% was assumed for LRVs.

The high-floor numbers increase slightly for Options A and B due to the proposed alignment extensions being assessed in each. For the two options, approximately 15 high-floor LRT cars and no additional low-floor cars are assumed relative to the future base network.

Exhibit 3.6: Transit Vehicle Fleet - LRVs - Constrained Base Scenario, Options A and B

SCENARIO	HIGH FLOOR LRT	WITH SPARES	HIGH FLOOR CARS	LOW FLOOR LRT	WITH SPARES	LOW FLOOR CARS
BASE	20	25	125	27	34	68
OPT. A	22	28	140	27	34	68
OPT. B	22	28	140	27	34	68

4. Performance of Network Element Options

In this section, the performance of the individual network elements is presented in order to identify key areas of interest within the network. This section builds upon the broader network considerations discussed in Section 3.

4.1. Measures/Definitions

The following measures are used in this section to better articulate the performance of individual routes and normalize them against each other.

- Average Hourly Boardings – AM and PM peak hour passengers getting onto a route, added in both directions, expressed as a per-hour average. It is a measure of how many people **use** (demand) a transit route or transit system.
- AM + PM Boardings per km – Total passengers boarding a route in the AM and PM peak hours, divided by the length of a round trip on that route (this distance is also known as the total directional route-km). This measures the **attractiveness** of a route and its assumed stops. It is divided by distance to allow us to compare routes with different lengths. This value is sensitive to land uses, destinations, and service assumptions.
- Boardings per service hour. This measures how many passengers board a route, divided by the amount of service being provided over a period. The total service hours on a transit route is the sum across all vehicles operating on that route. If 'N' buses each operate for a full hour on one route, then 'N' service hours have been provided. This is also a measure of attractiveness because it relates boardings to the amount of service. Boardings/hour is the main productivity measure in many Transit Service Standards, including ETS. This measure can be sensitive to stop spacing, and as such it is most applicable comparing transit routes within the same category, for time series monitoring, and system-wide statistics.
- Hourly Volume – Number of passengers on board transit vehicles, passing a location in a one-hour period, in one direction, on one or more routes. Maximum volume is the highest of these values along a route or corridor. This measures how **full** the service gets, which is both a measure of its attraction and an indicator how much service is needed to meet the maximum demand.



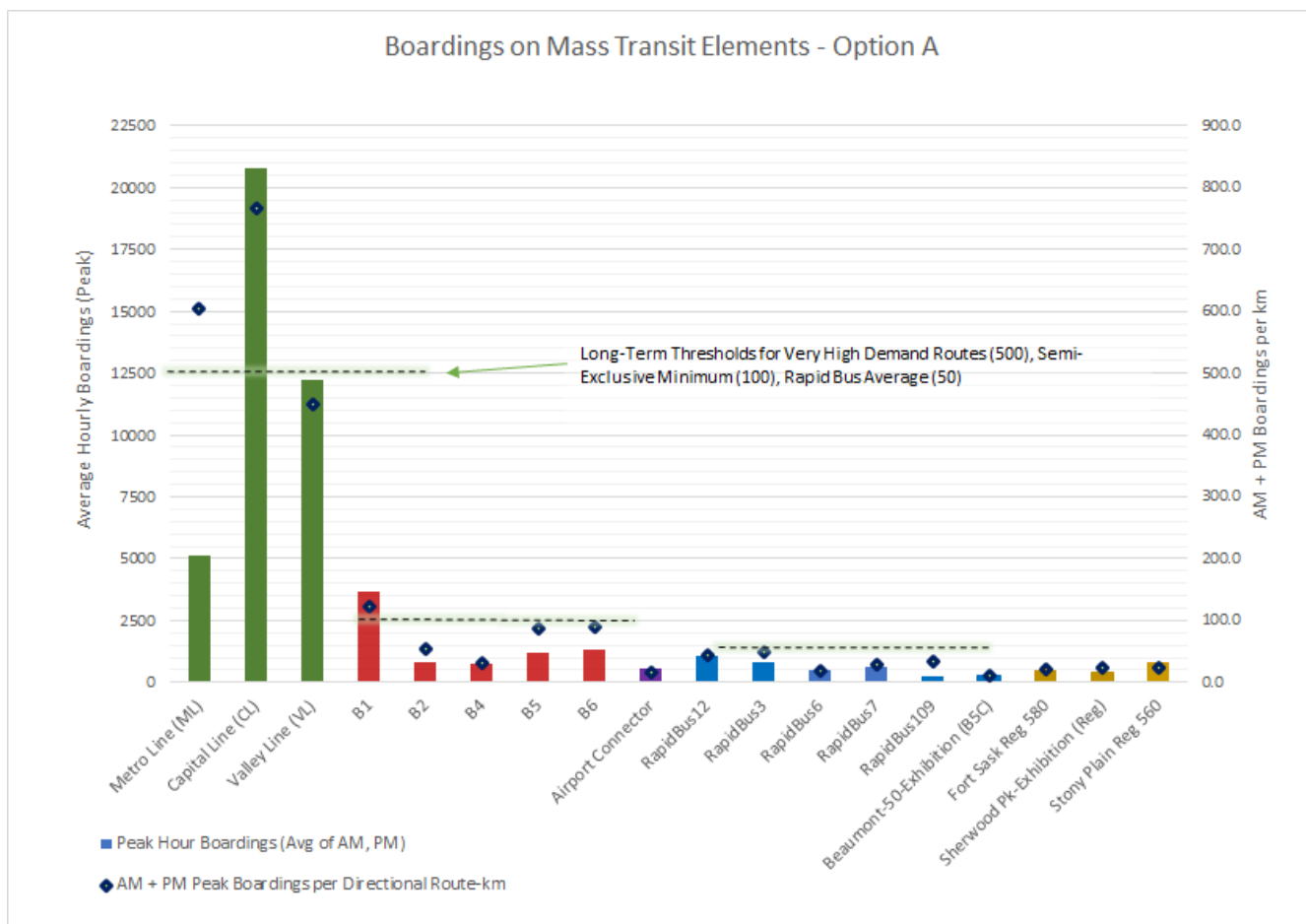
4.2. Exclusive, Semi-Exclusive and Rapid Routes

4.2.1. Boardings

Exhibit 4.1 summarizes the resulting average hourly boardings for the AM and PM peaks (coloured bars) and the AM + PM boardings per-km number (diamond shapes on the chart) for the major mass transit elements being tested in Option A.

The number of boardings has been colour-coded to roughly correspond with the maps in Section 2. Elements of the City-wide routes include exclusive ROW rail services (LRT lines in green, Airport Connector in Purple), semi-exclusive ROW transit (shown in red-orange), and routes operating in mixed traffic (rapid bus in dark blue, and major regional routes in tan-yellow).

Exhibit 4.1: Boardings on Selected Mass Transit Elements, Option A



- The first four routes in the chart all stand out with high numbers of passenger boardings indicating that these lines are most responsive to the demand generated by the mass transit network. These lines serve major travel demands and connect several of the highest-density employment areas in the city, which explains the popularity of these routes.

- The Metro Line, Capital Line, and Valley Line all include exclusive river crossings, either existing or under construction. This contributes to their capacity and speed advantages that attract passengers.
- For comparison purposes, the per-km threshold of 500 passengers is shown against the LRT routes. This threshold is comparable to the busiest surface route in Greater Vancouver, the 99 B-Line, a frequent limited bus between the SkyTrain rapid transit system and the University of British Columbia. This line represents a high level of passenger activity and requires substantial capacity – in fact part of the route is being replaced by rail in the next 5-6 years. The Capital and Metro lines will be reaching this type of threshold by the 1.25 Million population horizon.
- B1, and B2 propose new river crossings in the ultimate state, but these crossings are deferred beyond 1.25 million. The results above reflect B1 and B2 following existing routes as an interim approach to delivering service. In the case of B1, the effect of the detour and the less extensive bus lanes slows service and suppresses potential ridership, but B1 is still faster than most bus routes.
- B2 in its interim state follows Fox Drive and Whitemud, which places it in competition with peak express and all-day frequent buses for passengers. Its less direct interim routing depends on transit priority and bus lanes to gain some travel time advantages.
- The second per-km threshold of 100 passenger boardings is the suggested minimum to meet bus rapid transit service levels. This was established through comparison with peer services. For example, two of the Metro Vancouver rapid bus routes (R5 and R1, formerly the 95 and 96 B-Lines) currently achieve 130-170 peak boardings (two peak hours) per directional kilometre of route.
- B1 is projected to meet this demand threshold by the planning horizon, with B5 and B6 being close behind. Each of these routes is a combination of semi-exclusive and rapid service, on direct paths between nodes, and consequently they perform well against the per-km measure.
- Routes B4 operates as a rapid bus and at a somewhat lower frequency than the other 'B' routes in the interim network, and as such its performance is more in line with a starter rapid bus service.
- Other mass transit services are not expected to attract as many passengers since they serve less dense corridors and do not align with as many major activity nodes. For comparison purposes, the suggested threshold shown in the chart is 50 passengers per km.
- The Airport Connection and the regional routes are longer and with fewer stops. This type of service is usually evaluated as to how full the individual vehicles are, and how long the average passenger trips are on the service. Because the number of stops is usually fewer, the number of boardings per km will naturally be lower.

Exhibit 4.2 provides the same information, but for the set of routes included in Option B. There are several differences from Option A to point out:

- The Metro Line (ML) has more boardings in this option, since it includes the extension to Castle Downs. The number of passengers per km drops slightly as the extension includes a gap between stations that brings down the line's average.
- The Capital Line (CL) has fewer boardings in this option, which is a combination of two factors. The line does not include the HVTC extension but does add two infill stations that attract modest ridership. This has the effect of increasing the number of passengers per km despite the lower number of boardings overall.
- The set of rapid bus routes is slightly different, reflecting a different set of routes being tested. *Refer to the following pages for more discussion of the rapid bus routes across the two options where they were tested.*

Exhibit 4.2: Boardings on Selected Mass Transit Elements, Option B

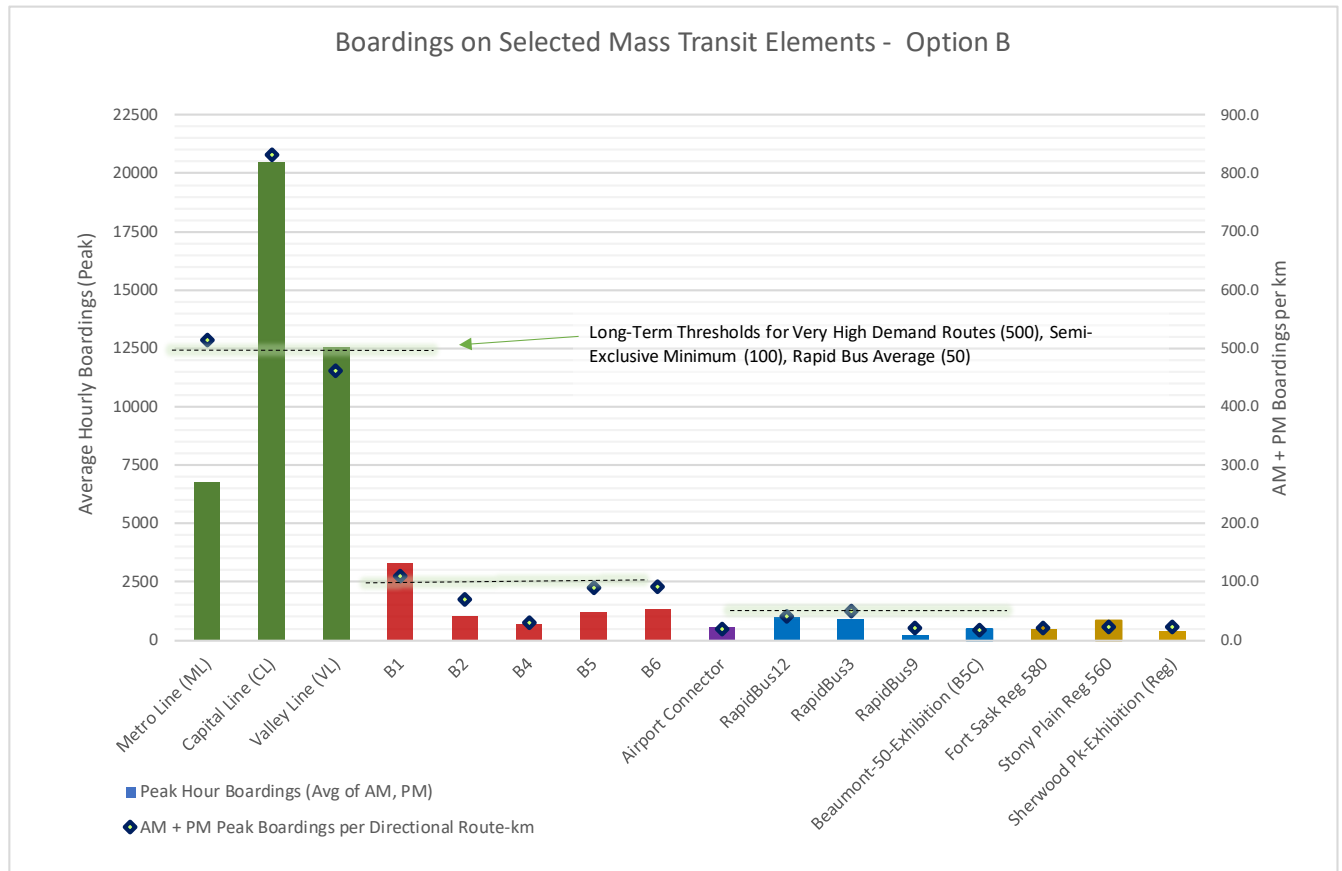
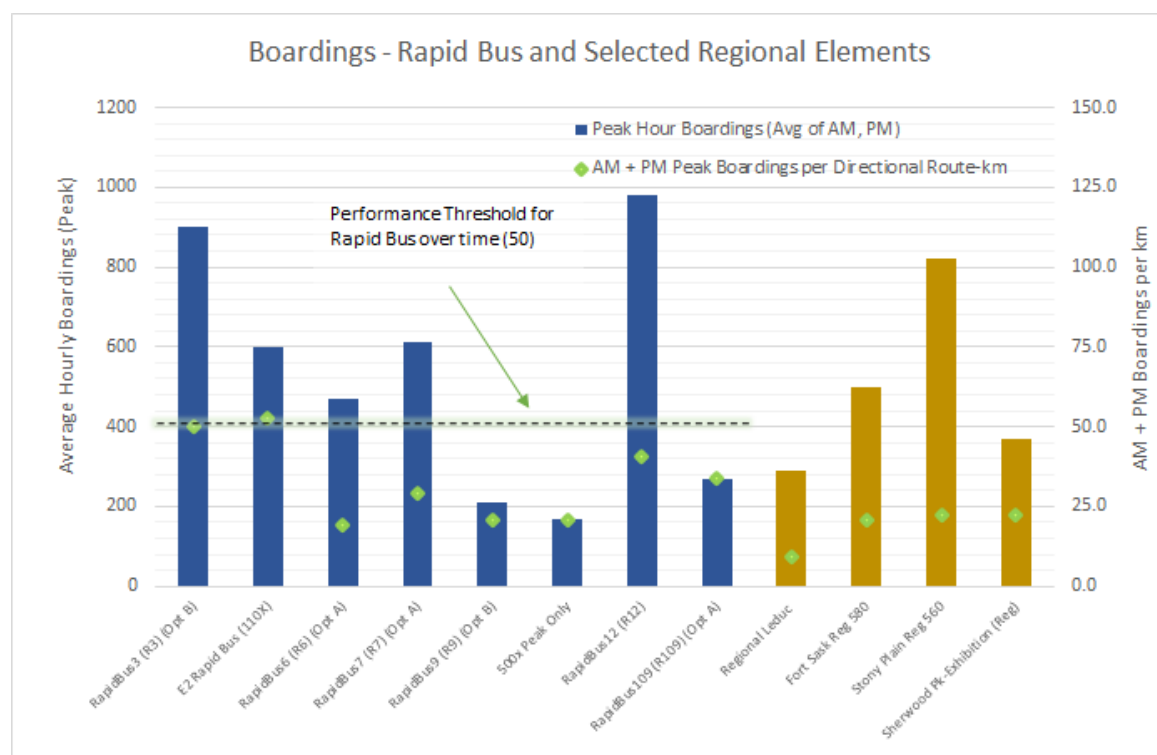


Exhibit 4.3 summarizes the average number of hourly boardings for the AM and PM peaks (coloured bars) and the per-km number of peak boardings for the rapid bus elements and several of the regional routes.

- Of the rapid bus routes, R12 (West Edmonton Mall/WEM - Clareview via Westmount, NAIT and 118 Ave) has the highest number of boardings. This is in part due to the route's length and its boardings per km are only third-highest in the category. A review of the passenger volumes shows relatively consistent peak loads along the length of the route, suggesting that many R12 passengers are travelling to the ends of the route and major transfer points along the line.
- Routes R3 serves the Ellerslie Road corridor, connecting to the Valley Line, Capital Line, and B6. It acts as both a crosstown trip option and provides access to north-south rapid transit from the southeast and southwest growth communities.
- Route E2 (ETS #110X) is a limited stop service on 97 Street between Eaux Claires and NAIT, and then continues downtown via 109 Street. It offers complementary service to B1 and is recommended to continue.

Exhibit 4.3: Boardings on Rapid Bus and Selected Regional Elements



A common transit industry metric for monitoring service performance is the number of boardings per hour of service. For most transit agencies, this is a useful way to manage service on a specific route and set financial priorities between similar types of routes, as it indicates how many passengers board each bus that is operating, in this case during the peak hours.

Exhibit 4.4 compares the LRT routes with the semi-exclusive and rapid routes in terms of boardings per hour, and boardings per route-km. The ranking of routes one would get is not the same between these measures. Boardings per hour on the LRT is naturally higher, reflecting service speeds, and the capacity of LRT being much higher. The Metro Line and Capital Line use high-floor trains of five cars, while the Valley Line uses low-floor cars in sets of two per train. The LRT indicator reflects train hours rather than car-hours.

Among the 'B' routes, B5 and B6 are the best performers in the service hour measure, which partly derives from their attractiveness along the route, and operations at fairly high speeds, which makes them efficient routes.

Exhibit 4.4: Boardings per km and per Service Hour, Selected Mass Transit Elements

Line Name (both Options unless indicated)	Peak Hour Boardings (Avg of AM, PM)	AM + PM Peak Boardings per Directional Route-km	Total Service Hours AM+PM	Boardings Per Service Hour, Peak
Metro Line (A)	5,120	604	6.4	1600
Capital Line (A)	20,770	768	32.2	1290
Valley Line	12,240	450	51.8	473
B1	3,680	123	79.3	93
B2	790	54	24.3	65
B4	750	31	15.9	94
B5	1,190	88	19.2	124
B6	1,310	89	24.4	107
Airport Connector	540	17	20.3	53
RapidBus12	1,070	44	39.6	54
RapidBus3	820	48	23.3	70
RapidBus6 (A)	470	19	15.1	62
RapidBus7 (A)	610	29	17.1	71
RapidBus9 (B)	210	21	7.46	56
RapidBus109 (A)	270	34	3.8	142
Beaumont-50-Coliseum (A)	290	11	18.6	31
Beaumont-50-Coliseum (B)	460	18	18.6	49
Note: In Option A, parts of RapidBus7 and Beaumont-50 overlap.				

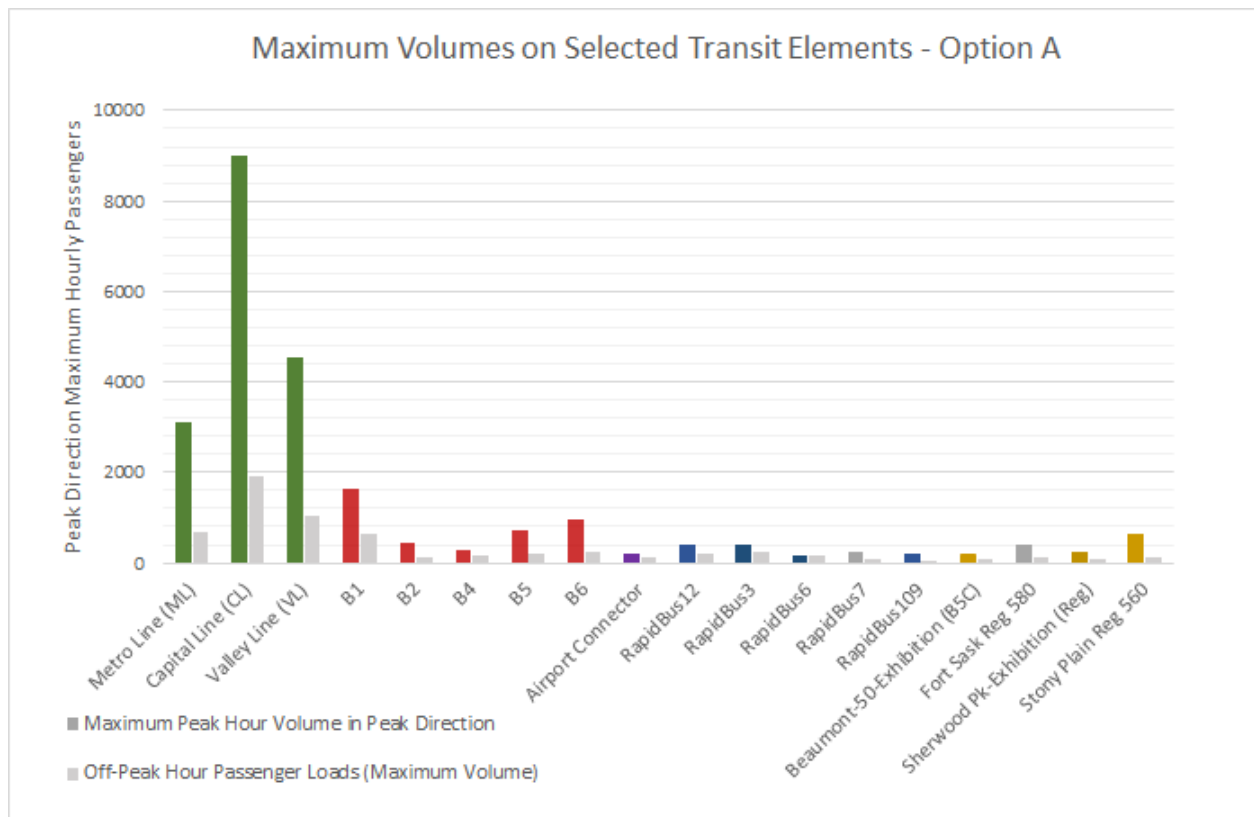
Boardings per service hour can vary greatly between different types of service, as shown above in the chart, and factors such as stop spacing, level of overlap with other routes, speed, and amount of service provided all factor into the response. The 'speed' is a measure of the running speed plus the time to access and wait for the service. This makes more frequent services very attractive to passengers, yielding the results as shown above where LRT and then the semi-exclusive 'B' routes perform well.

4.2.2. Peak Passenger Volumes (Passenger Load)

Exhibit 4.5 illustrates the maximum passenger volumes at the peak demand location on each route. It also shows the typical one-hour midday demand for each route in grey. For most of the routes, this value is less than half the peak hour which leads to service frequency being consequently much lower than in the peak, to better match service provided to demand.

- The maximum volume on the Capital Line is capacity-constrained to approximately 9,000 passengers, and this value is reached in the peak periods in the Base scenario and both of Options A and B. (Details for each line are included in Appendix A.8)
- Since it operates at half the frequency of the Capital Line, the Metro Line's capacity limit in the mode would be ~4,500 per direction, which it does not reach. Its peak load point is between MacEwan and Churchill Stations.
- While the B1 route was introduced in part to help address Capital Line capacity limits, its busiest point in Option A is north of 118 Avenue. The 97 Street segment has been identified by previous and recent studies (including the 2011 IRTMP and 2020 RTSC Business Case Analysis) as an important corridor for transit investment.

Exhibit 4.5: Maximum Volumes on Mass Transit Elements – Option A



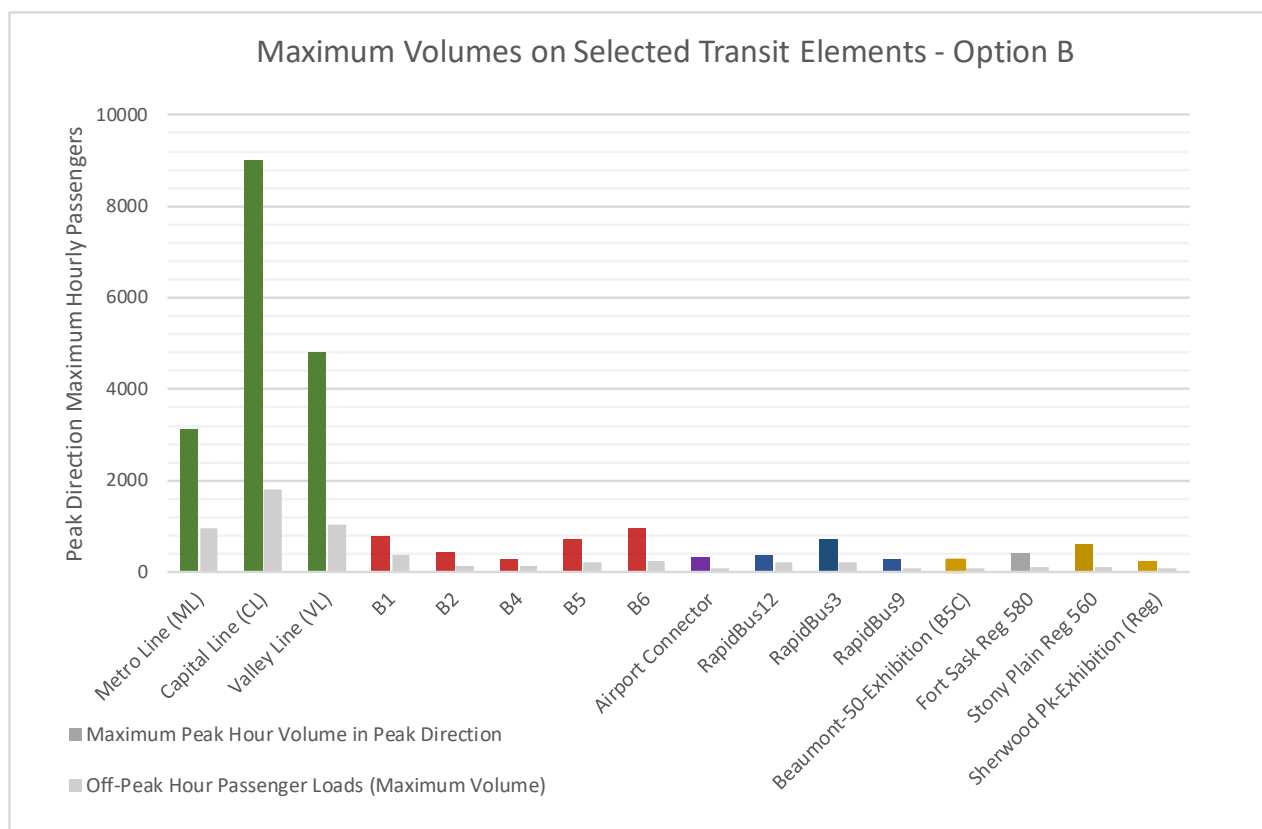
The maximum passenger volumes provide some of the guidance as to how much service would be needed on each route, in terms of frequency and vehicle capacity. Values of 2,000 passengers or fewer could be accommodated by articulated transit buses (or standard size buses) operating at a sufficiently high frequency and with support from transit priority measures.

The other aspect in defining these services is that some routes, especially in the off-peak, would not be expected to be as full, and would be operating at a policy headway to maintain convenience and make the service competitive in terms of overall trip times.

Exhibit 4.6 presents similar information for Option B. There are some notable differences to point out:

- Despite the ML extension in Option B, the peak load point downtown has similar volumes as Option A.
- The Capital Line hits the capacity limit in this option even without the extension. Additional passengers board at the infill stations, and marginally more people can fill up the capacity at stations closer to the peak demand point.
- Valley Line peak loads are slightly higher, in part due to feeder connections being tested as part of Option B.

Exhibit 4.6: Maximum Volumes on Mass Transit Elements – Option B



4.3. Frequent Routes

Exhibit 4.7 shows boardings for the Frequent routes as modelled in Option A. Many of these routes operate along primary and secondary corridors and pass through the Centre City node of The City Plan, which also explains their popularity. The routes are indicated by their functional code from the Bus Network Redesign (the same codes were used in the Mass Transit Network report). The ETS route numbers are also indicated for reference; this is what the public will see as the network identifiers.

Several routes stand out:

- Routes F5 (ETS #9) and F7 (ETS #4) are the busiest by number of boardings. F5 serves 112 Street south of downtown and 97 Street north of downtown. F7 serves 87 Avenue and Whyte Avenue, overlapping for much of its length with B2.
- The most productive route per km is F6 (ETS #3), which operates on 111 Avenue.
- F2 is not as busy a route by either measure, and it competes for passengers with the parallel Valley Line west. This appears to make it a less attractive route in the future.

Exhibit 4.7: Boardings on District Routes – Frequent Bus – Option A

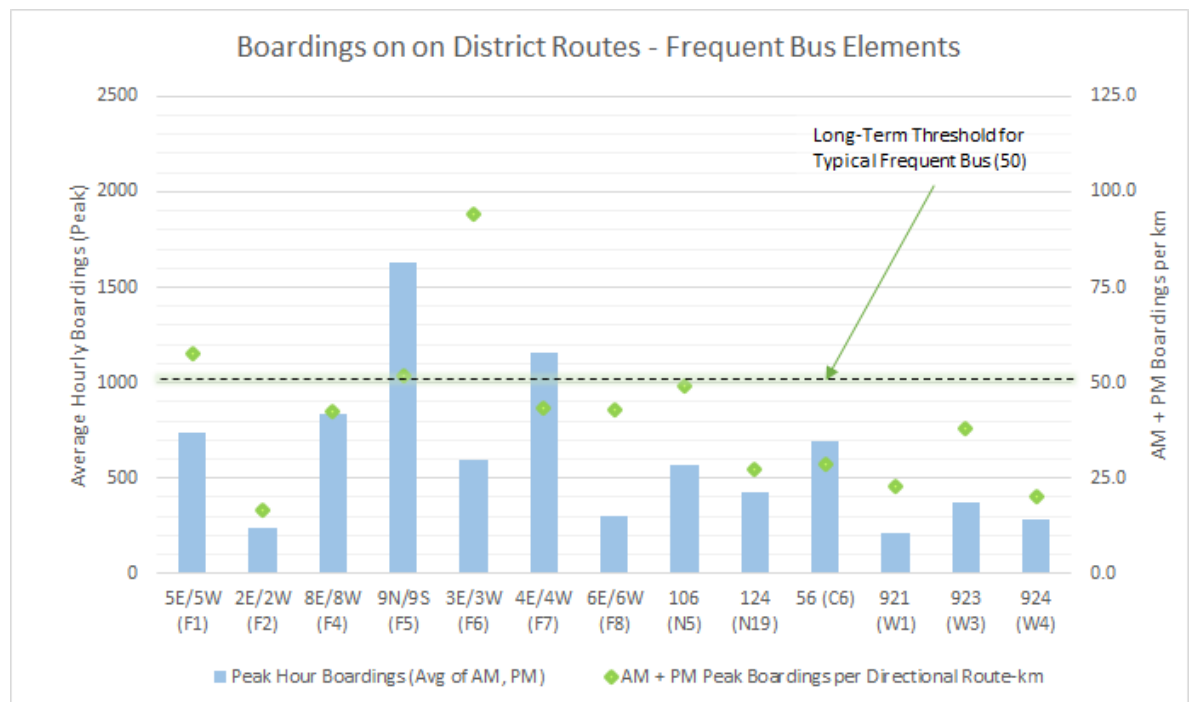
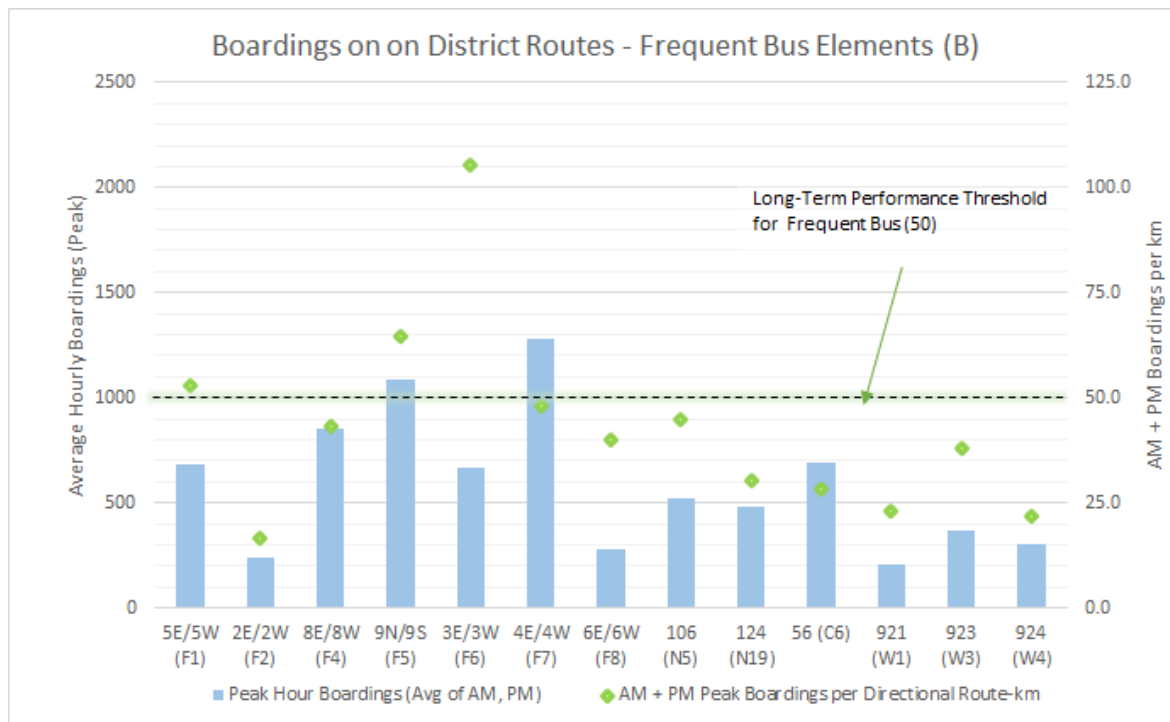


Exhibit 4.8 provides a comparison of frequent routes for Option B. The most significant difference is that F5 (ETS #9) sees fewer passengers, and this appears to be related to the Metro Line being extended north of the Yellowhead. This reduction in local demand in the face of ML and B1 competing for the same passengers also manifested itself in the demand forecasts for the Ultimate Mass Transit Network.

Exhibit 4.8: Boardings on District Routes – Frequent Bus – Option B



4.4. Trade-Offs between Mass Transit Service Options

This section focuses on locations where significant mass transit services were introduced relative to the Base Scenario, in one or both options, and illustrates the specific outcomes for those parts of the transit network.

4.4.1. Capital Line Extension

Exhibit 4.9 demonstrates the outcome of the Capital Line extension to Heritage Valley Major Node.

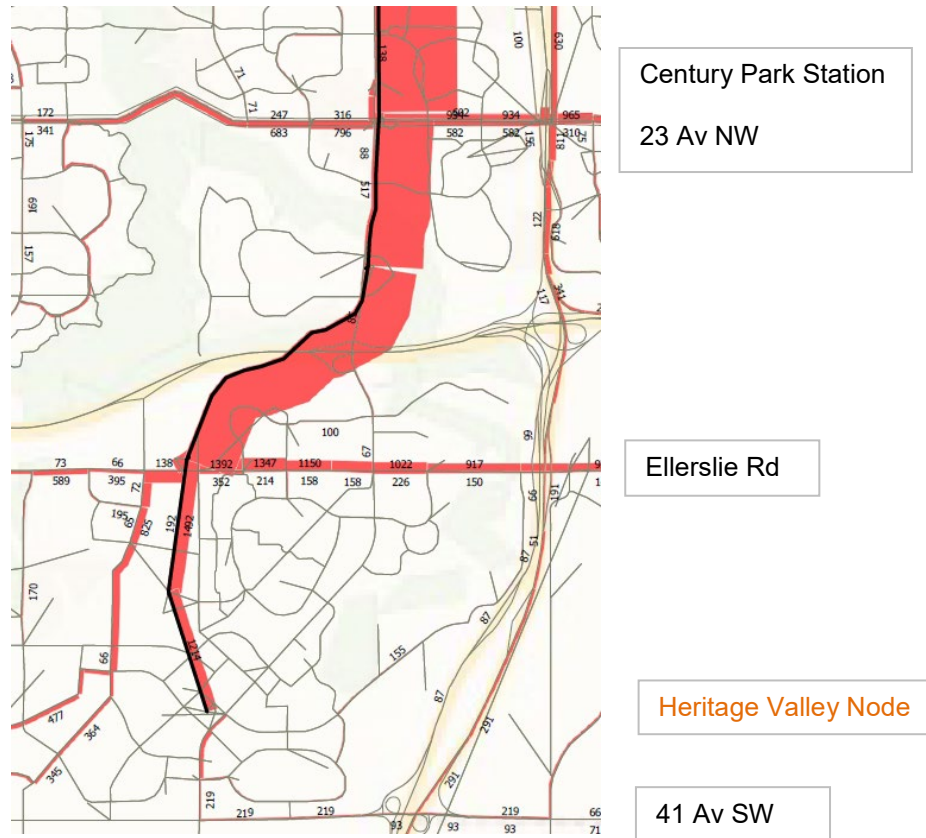
- During the AM peak, the Capital Line gains 1575 boardings
- Given that the length of the extension is 2.4 km, the extension attracts 650 passengers per km

The introduction of this extension increases transit ridership from this area. However, since the Capital Line is already capacity constrained in the future base, additional passengers boarding at any new stations would displace later passengers, unless the other passengers had other transit alternatives. The capacity limitation is reached for the AM northbound between McKernan/Belgravia and Health Sciences station. Past the peak point, the passenger load on the line is lower and passengers there are not displaced by adding demand.

This is where the other added transit services offered in Option A yield a benefit, by providing other routes in the north-south direction. These services include B6 (for passengers from the southwest) and B1 (for passengers heading north of Century Park towards Whyte Avenue or the City Centre). The parallel B6 service between South Campus and University stations also helps provide extra transit capacity between those LRT stations. The reverse occurs in the PM peak

where the LRT sees its maximum loads south of Health Sciences and continuing until South Campus. Refer to Appendix A (Exhibit A.8) for illustrations of projected passenger activity.

Exhibit 4.9: AM Peak Passengers Volumes – Capital Line Extension, Option A



4.4.2. Peak Loads on the Capital Line and Parallel services

The Capital Line already experiences heavy passenger loads during part of the AM and PM peak hours, with the highest volume of passengers observed south of Health Sciences station. This is expected to increase in the future as growth occurs in the south and southwest corners of the city, and the Capital Line is extended beyond Century Park, first to Ellerslie and then to the Heritage Valley Major Node. The 2030 base and Option B assumed a southwest terminus at Ellerslie Road SW park and ride, whereas Option A included a two-stop extension to Heritage Valley Major Node.

In parallel, the Terwillegar corridor connects to developed and developing communities in the southwest part of the city. The 2030 base includes a 'SWBRT' route, which in Options A and B was extended to University Station and renamed B6.

Exhibit 4.10 shows the effects of providing additional options north-south to complement the Capital Line:

- In both cases, the Capital Line reaches the modelling limit of 9,000 peak direction passengers. (Earlier modelling of the future base indicated that some passengers would shift to parallel transit routes, use autos, or some trips would not be made)
- In the Base, the SWBRT and the limited stop service added to Calgary Trail carry 900 additional peak direction passengers.

- In Option A, the combination of B1, B6 and the Airport Connector carry some 2,200 peak direction passengers. The additional routes and enhanced services clearly tap into a pent-up travel market that the Capital Line alone cannot address.

Exhibit 4.10: Peak AM Northbound Passengers on Mass Transit Lines Parallel to Capital Line

Route(s)	base	opt. a
Terwillegar Corridor (SWBRT / B6)	640	960
Capital Line LRT	9,000	9,000
Calgary Trail/Gateway (CPCBD / B1)	260	1,020
Airport Connector	--	220
Sum	9,900	11,200

4.4.3. Metro Line Extension

Option B included a test of the effects of an extension of Metro Line as far as Castle Downs station at 153 Avenue. This is illustrated in the transit volume plot in Exhibit 4.11.

Exhibit 4.11: Metro Line Extension and Connecting Services, Option B



Approximately 1700-1800 peak hour boardings are added in the AM and PM, taking into consideration the number of northbound and southbound passengers on the leg north of

Blatchford Station. For extension of 4.6 km, this amounts to over 360 passengers added per km of new construction. An important consideration for this option is the long bridge required to connect Blatchford to the stations north of Yellowhead Trail.

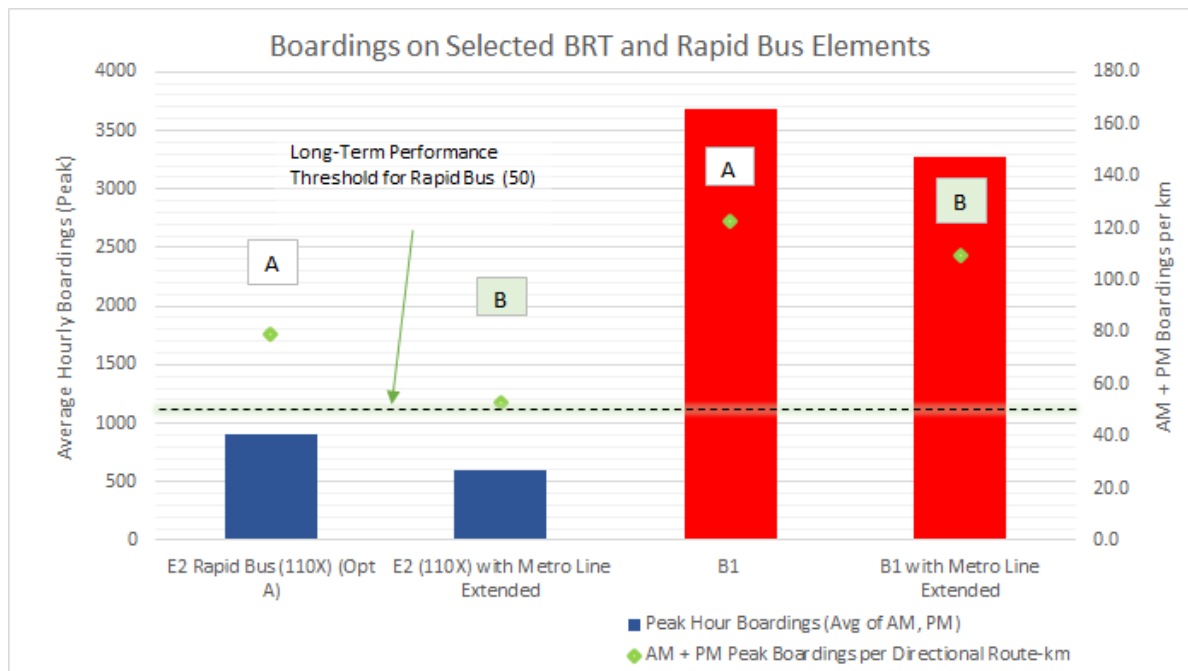
4.4.4. North of Centre City Node

As previously noted, Option B includes extension of the Metro Line to Castle Downs. This carries over 1700 passengers in the peak direction and produces 360 passengers per km. The Base Scenario and Option A exclude the Metro extension beyond Blatchford station.

Exhibit 4.12 shows the effects of the ML extension on the other key mass transit elements:

- The 110X limited stop bus drops 300 boardings, and the B1 drops nearly 400 boardings. Overall, the network gains approximately 1000 peak direction passengers from the ML extension. (This does not factor in the drop in riders on F5 also identified in Option B).
- The number of passengers per km on 110X and B1 decreases in Option B, but in either case, these are productive and attractive routes.

Exhibit 4.12: Peak Passengers to and from the North



Additional information on the demand profile for routes B1, E2 (110X) and F5 (ETS #9) is included in the Appendices. In Option A, routes 110X and 9 carry significant numbers of passengers as a complement to the B1 route, with a large number of passengers bound to and from the Eaux Claires Transit Centre.

4.4.5. Whyte Avenue

Shifting our attention to the east-west direction, one of the busiest travel corridor outside Centre City is the Whyte Avenue corridor. Options for this corridor have been reviewed in past studies and several different transit service options were considered in the scenario evaluation of this study. A semi-exclusive transit service complemented by frequent transit with closer stop spacing was identified as the best option for this corridor.

Exhibit 4.13 illustrates the differences between the base scenario and Option A, which includes B2. The interim version of B2 uses peak-direction, peak period bus lanes on Whyte Avenue as an initial step to improve travel time and reliability. With a future river crossing deferred for B2, the route would follow Fox Drive and Whitemud to connect to 87 Avenue.

- In the Base Scenario, during the AM Peak, peak loads are 760 WB and 250 EB passengers. This depends primarily on two frequent routes (F4 and F7), each operating at least every 10 minutes in the peak.
- In Option A, which includes B2, peak loads increase to 830 WB and 360 EB. There are increases in both directions and capacity for additional growth is added by the B2 service offering.
- Another benefit would be that the bus lanes in the peak direction could also benefit the F4 and F7, which was not explicitly assumed in the demand modelling.
- This corridor has a fairly high amount of passenger turnover, with passengers making short to medium length trips. This mix of activity is not as strongly reflected by the volume plot.

Based on a review of the passenger patterns, it would be recommended to assess the trade-offs between direct routing on B2, and detouring the route into University Station, and potentially South Campus.

Exhibit 4.13: Peak AM Passengers on Whyte Avenue, Base and Option A



Additional information on the demand profile for routes B2, F4 and F7 is included in the Appendices.

4.5. Additional Comparisons

GIS analysis was carried out for the major mass transit corridors being proposed to help evaluate which routes to prioritize. This information is a factor in the ridership results, but the conclusions one might draw are different, as the demand forecasts consider speed and network effects in addition to demographics.

4.5.1. LRT Station Catchments

Since Options A and B each consider LRT service expansion and test potential infill stations, the catchment of these potential new stations has been compared with some examples that would be present in the Base scenario. Several are already existing stations.

Exhibit 4.14 tabulates the results for 800-m radius catchment areas for stations, considering population and employment. The analysis takes an area-based average from the transportation zones around the stations and prorates how many residents and jobs might be within the radius. True results would vary since not all zones are uniformly developed.

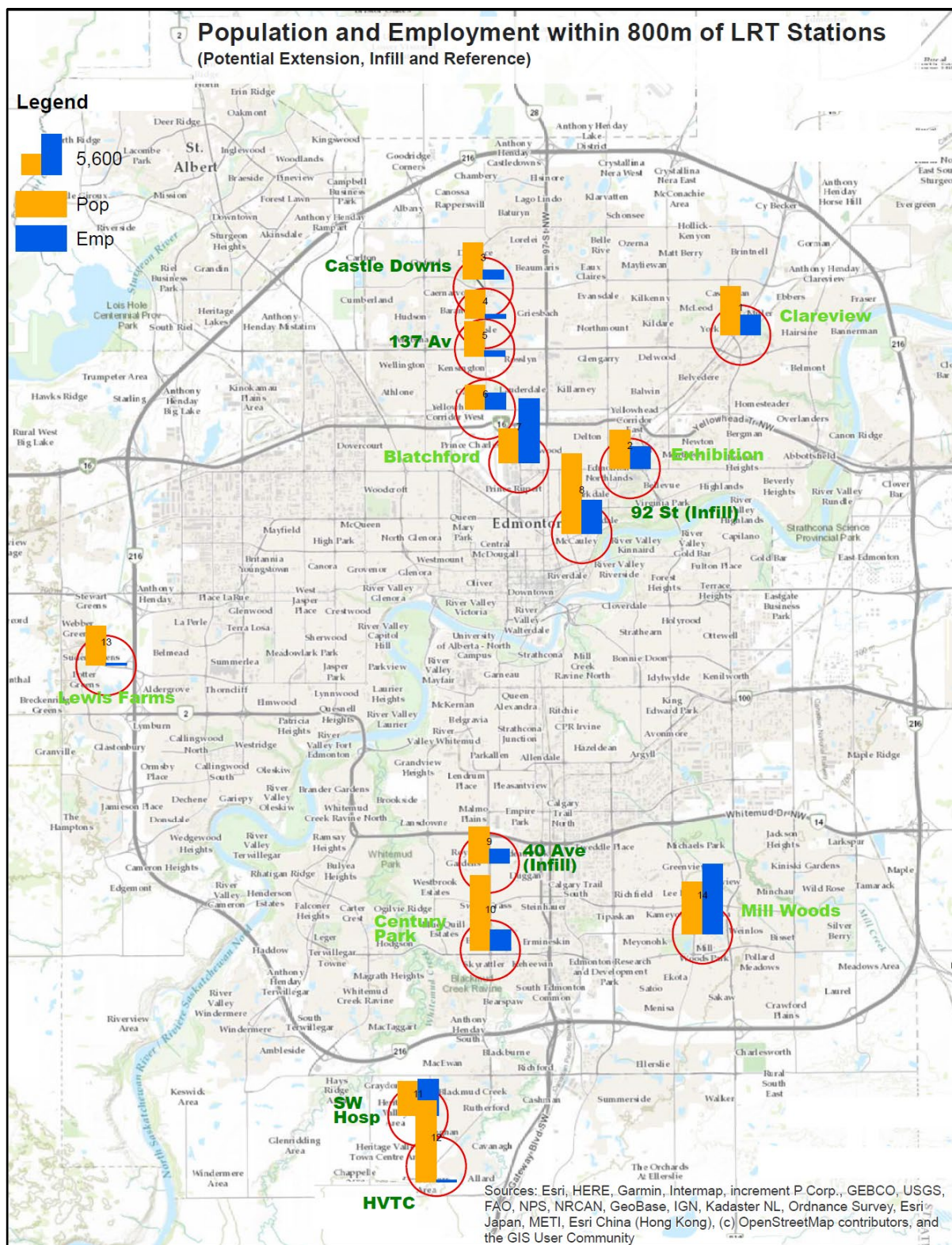
Nearly all the stations in this table have reasonable populations and most have nearby employment that would make them a potential destination for some transit passengers. Just based on these results, one might anticipate that the SW Hospital and Heritage Valley Town Centre stations will be strong performers in the future. It also suggests that the 92 Street station site might be worth pursuing provided that good connections and development plans around the station would support a business case to advance with that location.

Exhibit 4.14: Population and Employment within 800m of Selected LRT Stations

Station	Pop	Emp	Notes
Precedent Stations - included in Base			
Clareview	6,700	2,750	2021 end of CL
Exhibition	5,350	3,000	
Century Park	10,300	2,800	2021 end of CL
Mill Woods	7,150	9,650	2021 end of VL
Lewis Farms	5,500	300	future west end of VL
Blatchford	4,700	8,850	future north end of ML
Extension Stations			
Castle Downs	5,000	1,350	ML Ext. in Opt. B
145 Av	3,850	600	ML Ext. in Opt. B
137 Av	4,850	800	ML Ext. in Opt. B
132 Av	3,350	2,300	ML Ext. in Opt. B
SW Hospital	4,750	5,100	CL Ext. in Opt. A
HVTC	11,200	200	CL Ext. in Opt. A
Potential Infill Stations			
92 St	11,050	4,600	On CL in Opt. B
40 Av NW	5,000	1,900	On CL in Opt. B

Exhibit 4.15 is a map showing these stations, to provide some geographic context for the results.

Exhibit 4.15: Map - Population and Employment within 800m of Selected LRT Stations



4.5.2. Mass Transit Corridor Catchments

For the semi-exclusive and rapid bus routes, a 400-metre catchment around the path of each route was used as an approximation of the area served by each route. For several of the longer routes, segments were used in this analysis to differentiate between different parts of each corridor.

Exhibit 4.16 is a tabulation of the results for the 2030 modelling horizon. The corridor names are approximations and indicate which routes were being evaluated with each segment. Since these numbers are absolutes, they reflect land use patterns as well as the extent of each corridor.

Exhibit 4.17 is a map showing the segments to aid in interpretation.

One surprising observation was that corridor 11 (Terwillegar) is not a standout from the perspective of land use, and its performance is related to its speed and the set of origins and destinations it connects.

Exhibit 4.16: Population and Employment within 400m of Mass Transit Corridors













































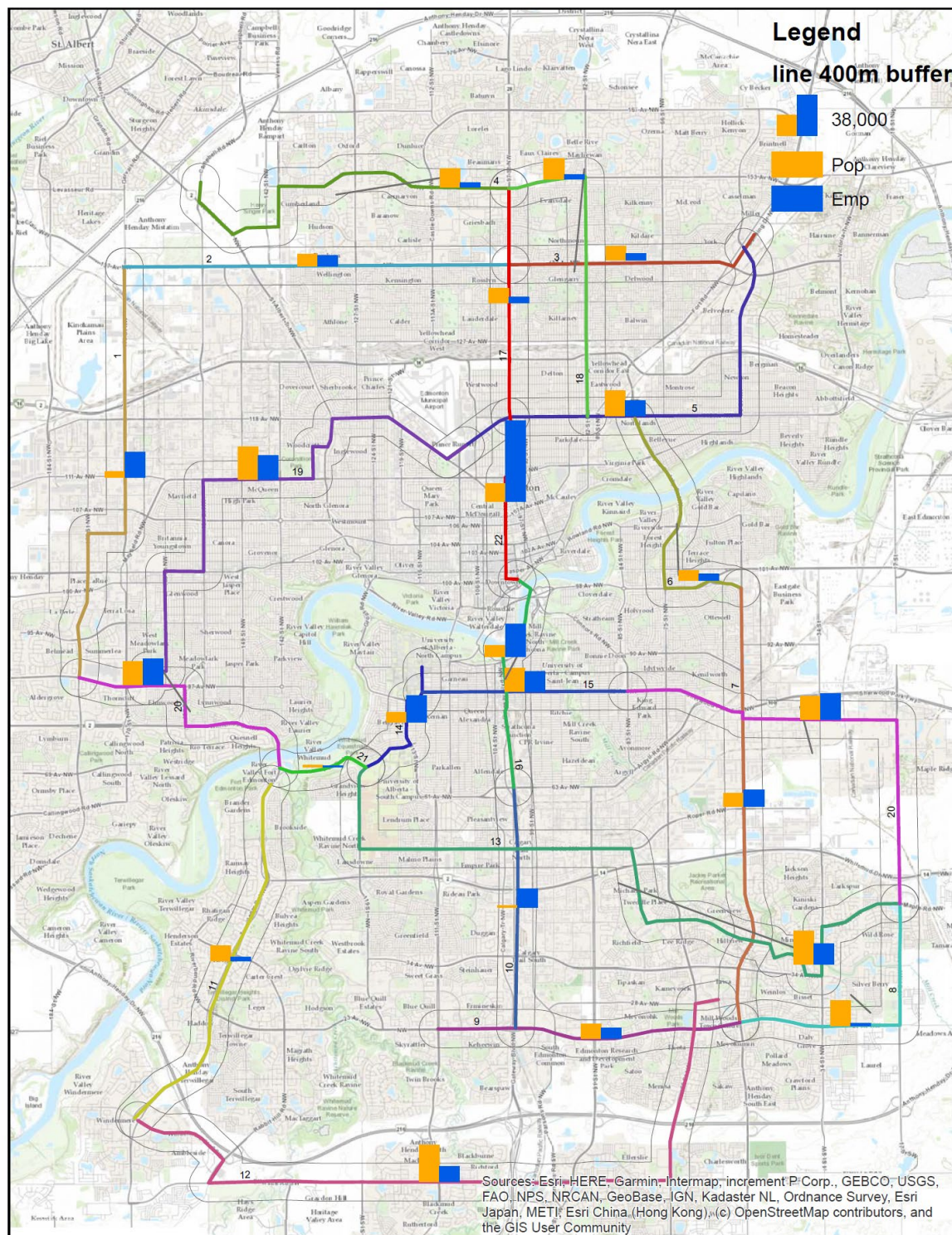
Estimated Statistics for 400 m Buffer around Transit Lines					
Map #	Location/Corridor	Population		Employment	
1	WEM TO 153 (B4)		5,400		23,900
2	137 WEST OF 97 (B4)		10,900		9,900
3	137 EAST OF 97 (B4)		13,800		6,600
4	153 Av (B1a)		17,700		4,600
5	EAST of NAIT (R12)		24,100		14,700
6	WAYNE GRETKY (R7, B5C)		9,300		6,200
7	50 St N. of MILL WOODS (B5C)		12,900		16,000
8	EAST OF MILL WOODS (B5)		24,100		2,600
9	23 Av, W. of MILL WOODS (B5)		14,000		10,600
10	23 Av TO 63 Av (B1/B1A)		2,400		17,900
11	TERWILLEGAR (B6)		15,000		3,800
12	ELLERSLIE RD (R3)		35,300		14,700
13	FOX DRIVE to MEADOWS (R6)		32,200		20,100
14	UNIVERSITY-S.CAMPUS (B2/B6)		9,300		25,400
15	WHYTE, W. of BONNIE DOON (B2)		22,300		19,400
16	63 TO N. Sask. River (B1/B1A)		11,000		31,300
17	97 NORTH OF 118 (B1/B1A)		13,600		5,700
18	82 St (R7)		20,000		4,500
19	WEST OF NAIT (R12)		30,800		22,900
20	WEM TO FOX DRIVE (B2)		22,500		24,700
21	FOX DRIVE (B2/B6/R6)		1,700		1,000
22	101 STREET/DOWNTOWN (B1/B1A)		17,200		76,700

Exhibit 4.17: Map - Population and Employment within 400m of Mass Transit Corridors



5. Recommendations for Mass Transit Planning at 1.25 Million

This section provides an initial recommendation for mass transit priorities leading up to the 1.25 Million population horizon. It includes an overview of the network and a discussion of each of the major elements, including what areas they serve, the rationale for the route, and implementation considerations (where applicable).

5.1. Most Promising Elements

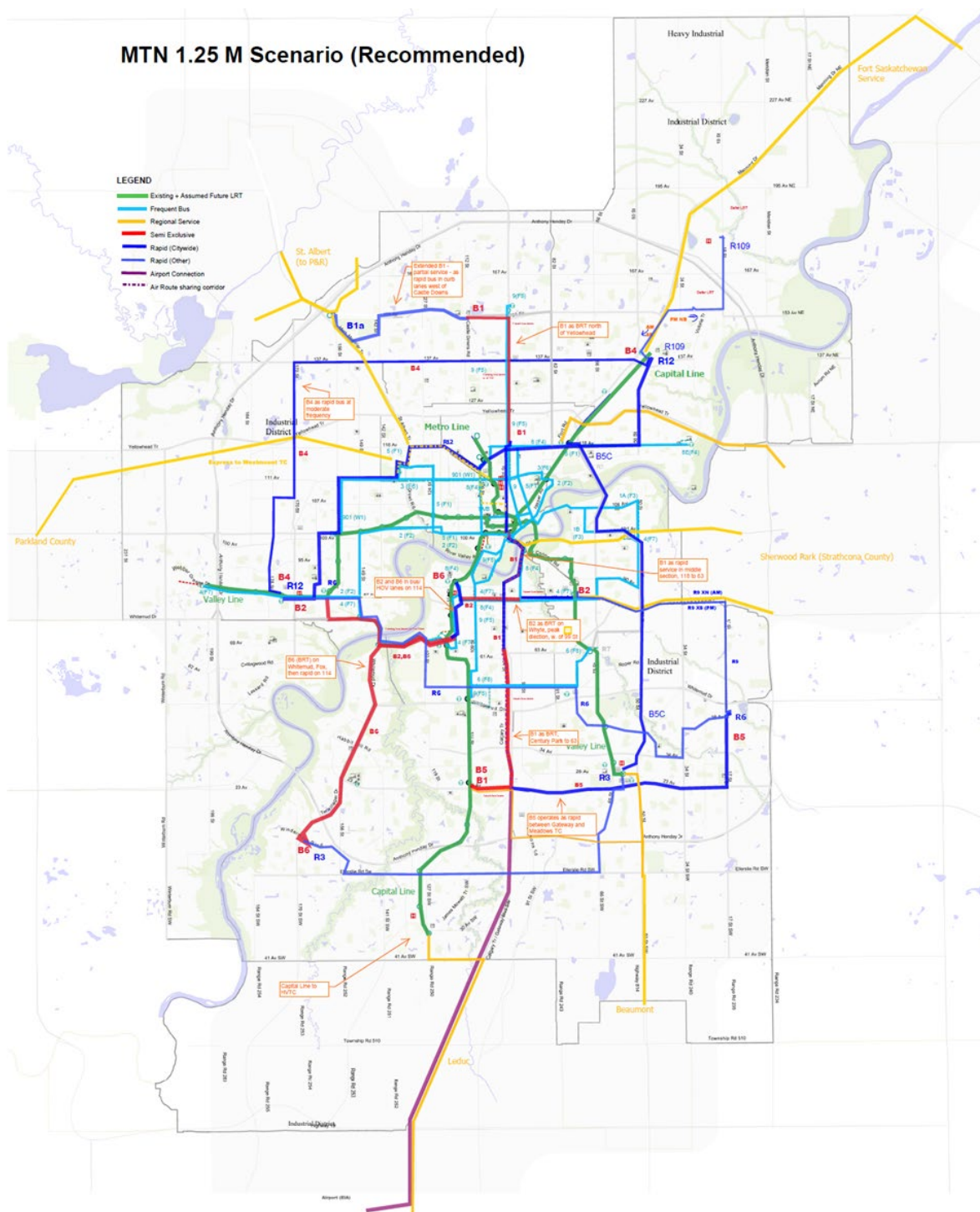
Based on the performance indicators and success factors for mass transit, the following elements are included in the recommended interim network for the 1.25 Million population horizon:

- The Heritage Valley Major Node extension of Capital Line is more likely to occur, ahead of the Metro Line extension beyond Blatchford, due to the expected development to occur at this Major Node.
- Several infill LRT stations are possible as development opportunities arise. Business cases should be created to validate their potential as opportunities arise.
- B1 (part BRT/ part rapid bus) replaces and expands on existing routes, operating from Century Park to Campbell Road connecting Whyte Avenue, the Centre City Node with the north and south sections of the city and Castle Downs
- B2 (part BRT/ part rapid bus) will connect from West Edmonton Mall to Bonnie Doon through the University of Alberta and Whyte Avenue. The balance of service levels and stopping patterns on B2 and existing routes warrant further study.
- B4 and B5 will initially begin service as rapid bus - to build demand.
- Terwillegar Bus Lanes will be implemented and converted to the “BRT” B6 with a rapid bus extension to University station. This will help avoid a forced transfer and provides additional capacity parallel to the peak load point on the LRT network.
- RapidBus routes R3, R12, E2 (110X); and R6 are recommended to provide a consistent spacing across the city of limited-stop bus routes. The higher achievable speeds attract additional future passengers.
- R9 and R109 are recommended to provide peak rapid service and connections to LRT from outlying development.
- Initiation of the Airport Connection using Hwy QE2 and follow the B1 routing.

Details of the individual routes are discussed in the following pages. Exhibit 5.1 illustrates the resulting network. Maps of the same network subdivided by the Citywide and District components (based on their categorization in the Ultimate MTN) are included in Appendix A.



Exhibit 5.1: Mass Transit Recommendations – 1.25 Million Population Horizon



5.1.1. Light Rail Transit (Citywide)

Exhibit 5.2 focuses on the subset of routes within the interim network that are categorized as Citywide in the Ultimate Network.

Capital Line (LRT): Clareview – Heritage Valley Major Node

The Capital Line (CL) will ultimately connect North-South from Edmonton Energy & Technology Park to the Heritage Valley Major Node. Along that route, it will serve the following nodes: Horse Hill, Clareview, Exhibition, Stadium, Centre City, University/Garneau, Southgate, Century Park, Heritage Valley and several important corridors. The line is recommended to retain its current northeast terminus at Clareview until at least 1.25 million horizon, given that only modest development is envisioned to the northeast. A peak-period bus route (see RapidBus109) is proposed to serve the area in the meantime.

This line currently has the highest peak passenger volumes and is expected to grow, with peak volumes occurring south of Health Sciences. This section will be capacity constrained until post-1.25 million horizon, as operating more than 12 trains per direction is not feasible at the existing level crossings. The mass transit network will include pre-1.25 million alternatives, including the B1, B2 and B6 routes (described in the next section) and an Airport Connection which all demonstrate positive results in ridership uptake and relief for the Capital Line.

Metro Line (LRT): Blatchford – Health Sciences

The Metro Line (ML) will ultimately connect north-south from Campbell Road to South Campus through the following nodes and corridors: Castle Downs, 137 Avenue, Blatchford-NAIT-Kingsway, Centre City and University/Garneau utilizing an exclusive ROW (as defined in this study).

For the 1.25 Million horizon, the current phase under construction will replace the temporary NAIT station and extend the line to Blatchford. A second phase of construction, likely to occur post-1.25 million, would follow a new bridge over the Yellowhead Trail and CN rail yards, and add four new stations, ending at Castle Downs station until a third phase to Campbell Road is constructed.

To the south the proposed longer-term service will be South Campus station, to provide capacity relief for the Capital Line. However, due to significant challenges in grade separating at University Avenue/114 St, the interim terminus for the Metro Line will be at Health Sciences station. It is anticipated that the implementation of other capacity relief measures (such as route B6) could provide future flexibility (post-1.25 million) to address this location.

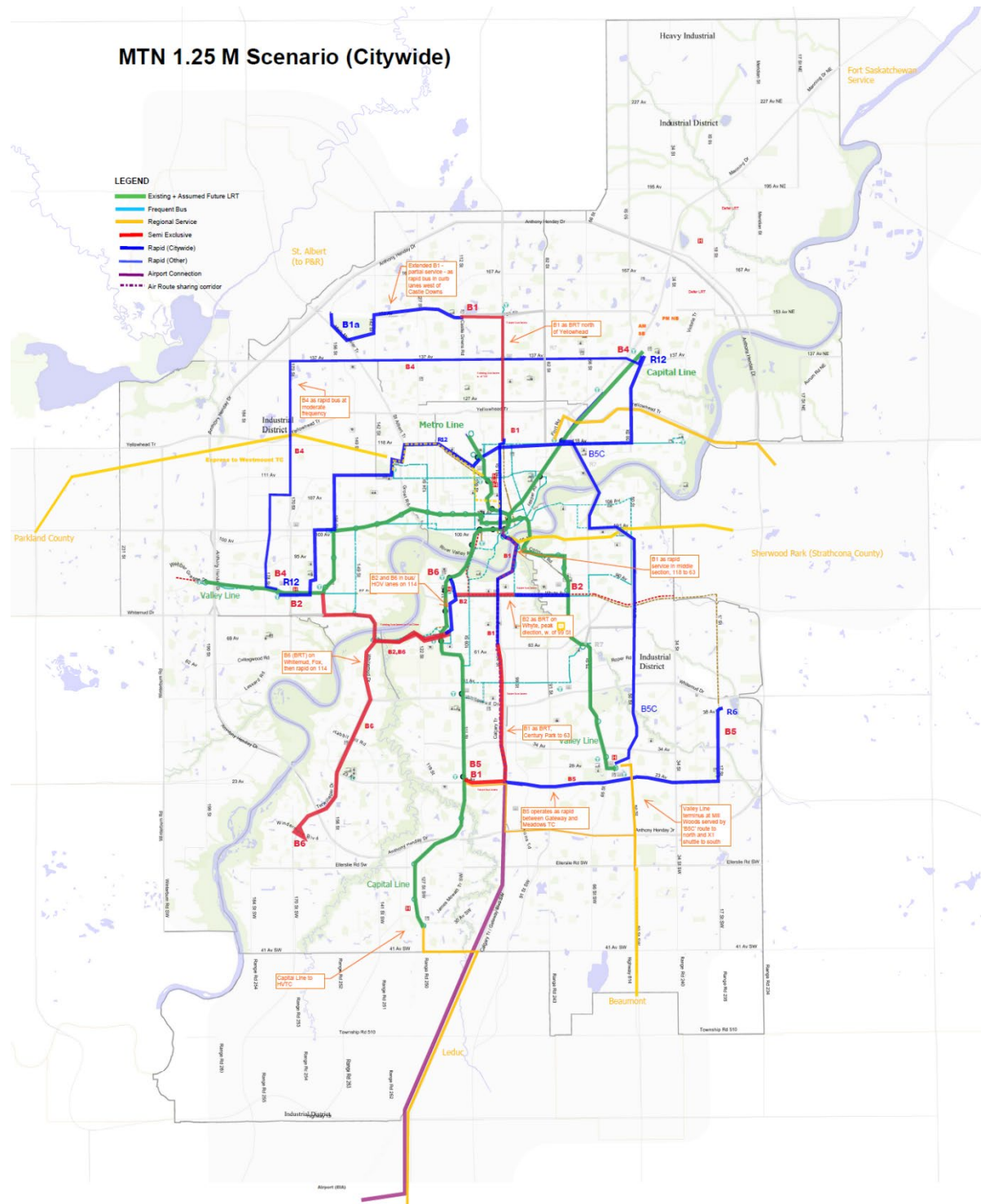
Valley Line (LRT): Lewis Farms – Mill Woods Node

The Valley Line (VL) will connect West to Southeast from Lewis Farms to Ellerslie Road (Charlesworth District Node). Along the way, it will serve the following nodes and corridors: Charlesworth, Mill Woods, Bonnie Doon, Centre City, Stony Plain Road, Meadowlark, West Edmonton Mall/Misericordia.

This LRT line will be using low-floor technology and will be more integrated into the urban fabric of the areas it serves, in particular the street-level segments on 102 and 104 Avenue in the Centre City. An initial segment from 102 Avenue to Mill Woods will enter service later in 2021, and construction of the west segment to Lewis Farms is now in the procurement stage.

Any extension beyond Mill Woods is expected to occur post-1.25 million. At or near the future site of Ellerslie SE/Charlesworth Station, a park and ride facility is planned, with an express shuttle connecting it to Mill Woods.

Exhibit 5.2: Citywide Mass Transit at 1.25 Million Population Horizon



5.1.2. Semi-Exclusive Services (Citywide)

Each of the non-LRT services introduces bus services on various forms of right of way with different levels of priority. In most cases, these routes provide an alternative form of transit service on routes that would already have service by extending the principles of the Transit Strategy and the Bus Network Redesign. However, the new mass transit routes offer speeds, directness, and coverage different from the other forms of bus service, which would make more frequent stops.

When the mass transit routes are implemented, ETS will find there are advantages to re-balancing the levels of service between the different routes to optimize how passenger needs are met. Based on other Canadian cities where the two forms of bus transit run in parallel, the semi-exclusive and rapid services typically capture 60-80% of the passenger demand and the other services can thereby operate at reduced frequencies, depending on the type of corridor.

B1 Route (BRT): Campbell Road – Castle Downs District Node – Century Park District Node

B1 is a proposed semi-exclusive transit route that will operate north-south from the Castle Downs district node to the Century Park district node in its ultimate configuration. This route will serve the following nodes and corridors: Northgate/Norhtown, 97 Street, Centre City, Whyte Avenue, Gateway/Calgary Trail. The route would primarily utilize 97 St, 101 Street and Gateway Boulevard/Calgary Trail.

The B1 service would stop every 1 to 1.5 km along its route and provide connections to numerous other elements of the mass transit network as well as the underlying network of other bus transit services. This adds significant north-south high-capacity frequent service to denser parts of the urban area. In the section north of 118 Avenue, B1 would operate in parallel with another rapid service, E2 (ETS #110X), which would provide additional capacity on this busy section of the transit network. E2 was assumed to connect to Eaux Claires Transit Centre while B1 stopped nearby at 153 Avenue and 97 Street. These assumptions should be revisited to determine the optimal stopping pattern for the services in the 97 Street corridor.

In its early stages of implementation, a 'B1A' extended service would continue onwards as a rapid bus using the mixed traffic lanes of 153 Avenue, making limited stops until a terminus at Campbell Road. This will provide service in northwest Edmonton and connect to numerous regional routes at the St. Albert transit facility. By the 1.5 Million horizon, once the Metro Line is extended west past Castle Downs, route B1 would be shortened and Castle Downs would become its north terminus.

In its interim state, this route will make use of dedicated bus lanes covering the maximum extent feasible. For 1.25 million, it is proposed that the bus lanes extend:

- North-south on 97 Street during peak periods in the peak direction (as a minimum);
- North-south on Calgary Trail and Gateway Boulevard, once implementation has been worked out for stop locations and operations at connecting streets and major commercial driveways;
- East-west on 153 Avenue to connect to Castle Downs hub, during peaks, and similarly east-west on 23 Avenue to connect to Century Park.

In addition to these areas where bus lanes are proposed, transit priority measures may also be considered where warranted to mitigate speed and reliability issues, in particular for limited-stop buses to avoid long queues and delays at signals with lengthy peak-period cycle lengths. This guidance would apply to all other routes in the semi-exclusive family in addition to transit hot-spots identified through travel time performance monitoring by ETS.

This route proposes a dedicated river crossing in the long term (by 2065); however, for the 1.25 Million horizon it is assumed that route B1 would repurpose some of the capacity on existing

bridges to carry the route between the downtown hub and the Whyte Avenue district. Near-term options include the Low Level and Waltherdale Bridges and connecting streets. The details of this section of the route will require more detailed analysis and will also reflect other projects in the vicinity, such as River Crossing.

B2 Route (BRT): WEM/Misericordia Major Node – Bonnie Doon District Node

B2 is a proposed route crossing east-west from WEM/Misericordia Major Node to Bonnie Doon District node. B2 will serve the following nodes and corridors: Meadowlark, University/Garneau, Whyte Ave/99 Street and Gateway/Calgary Trail.

The interim route for B2 defers consideration of a new river crossing to post-1.25 million 2030, and instead follows a less direct route via Whitemud Drive and Fox Drive. Long-term demand will warrant future exploration of the river crossing connection, not only determining potential financial costs but also social and environmental costs associated with this option.

B2 will operate semi-exclusively using peak-period, peak direction bus and HOV lanes on Whitemud Drive, Fox Drive, and Whyte Avenue west of 99 Street.

B5 Route (BRT): Century Park – Meadows North District Node

B5 is a proposed route making limited stops, operating in a primarily east-west orientation across the southern part of Edmonton. Longer-term, it is proposed that the route would operate from WEM/Misericordia and Meadowlark and then south and east to the Meadows North node. The interim version of the route includes only the eastern portion, where passenger demand is projected to emerge sooner. The proposed interim route, using 23 Avenue NW, will serve Century Park, South Common - Research Park, Mill woods, and Meadows South. The western portions of the ultimate B5 service will initially be addressed by similar crosstown bus routes.

This route will initially operate as a mix of semi-exclusive (west of Calgary Trail) and rapid bus, and transition over time towards more semi-exclusive alignment as demand increases.

B6 Route (BRT): University/Garneau Major Node – Windermere Hub

B6 is a proposed route servicing south-west Edmonton, using dedicated lanes on the Terwillegar Expressway to serve stations at major cross streets. The map shows an assumed route via Fox Drive and an extension of service via 114 Street to University LRT station. This extension is assumed to operate in mixed traffic given the physical constraints present on these streets. Spot improvements to signal timing along 114 or 112 Streets may be able to provide some transit priority; however, the details would also depend on adjacent LRT operations and how that interfaces with the traffic signals.

As indicated in public presentations for the Terwillegar Project, the initial “southwest BRT” was assumed to follow Fox Drive and Whitemud westbound/south, while coming north it would use 122 Street. This is nearly identical to B6, except for the section between the University and South Campus stations.

A direct connection to University station was found to increase the attractiveness of this route, by avoiding a forced transfer at South Campus station, in a section of the Capital Line where peak direction capacity is more limited.

5.1.3. Airport Connector

Airport Connector: Centre City (Downtown) – Edmonton International Airport

This proposed Citywide route would provide regional and intercity travel to the Airport, connecting with other services including the Metro Line, Capital Line, Valley Line and other Citywide routes (B1, B2, R8, B5, and R3).

The interim proposal for this route is to provide coverage by extending bus services using the B1 corridor between approximately 104 Ave (downtown) and 23 Ave NW. Because this route

extends well beyond the city to EIA, there may arise challenges with operational reliability. In addition, operating bus service with stops along the Queen Elizabeth Highway may also require a provincial partnership.

5.1.4. Rapid Bus

Citywide Elements

B4 Route (BRT): Clareview Major Node – WEM/Misericordia Major Node

B4 is a proposed route operating crosstown from WEM/Misericordia Major Node to Clareview Major Node, connecting the following nodes and corridors: Londonderry, Northgate/Norhtown, 137 Avenue. It will travel through northern and western Edmonton, primarily on 137 Avenue (east-west) and a combination of 170 and 178 Street (north-south). Initially, this route will operate in mixed traffic with strategically located transit priority features. Over time, it is expected to transition towards using semi-exclusive lanes in more congested portions.

RapidBus12 (R12): WEM/Misericordia Node– Clareview Major Node

R12 is a proposed rapid transit route operating east-west with limited stops between Meadowlark district node and Clareview major node. The route travels primarily along 118 Avenue, with a north-south section on 163 Street. This route has strong ties to land use, with ten nodes and corridors along its proposed route including the following: 124 Street, Blatchford-NAIT-Kingsway, 97 Street, 118 Street, and Exhibition.

In addition to the corridors being served and the support it will provide for intensification along 118 Avenue, and Kingsway near Blatchford, this route has an important role providing connections to other mass transit routes at transit centres and LRT stations. This includes two locations along the Valley Line, once on the Metro Line, and twice on the Capital Line. In addition, it also provides service to Westmount Transit Centre.

B5C (50 Street-Exhibition): Mill Woods Node – Exhibition District Node

Over the long term, this route is identified as a regional connection due to the southern portion operating in the City of Beaumont. Trips from Beaumont are partially oriented towards the southern end of the Valley Line, but many also continue north along 50 Street. The primary markets served by this route are crosstown travel to and from the Exhibition district node and trips to and from employment areas along 50 Street and in Capilano. The interim B5C route will focus on providing rapid crosstown service between Mill Woods and Exhibition (Coliseum LRT station). Service south of Mill Woods on 50 Street is planned to be provided by a limited-stop shuttle (in lieu of route B5C) to a future park and ride facility at Ellerslie Rd SE.

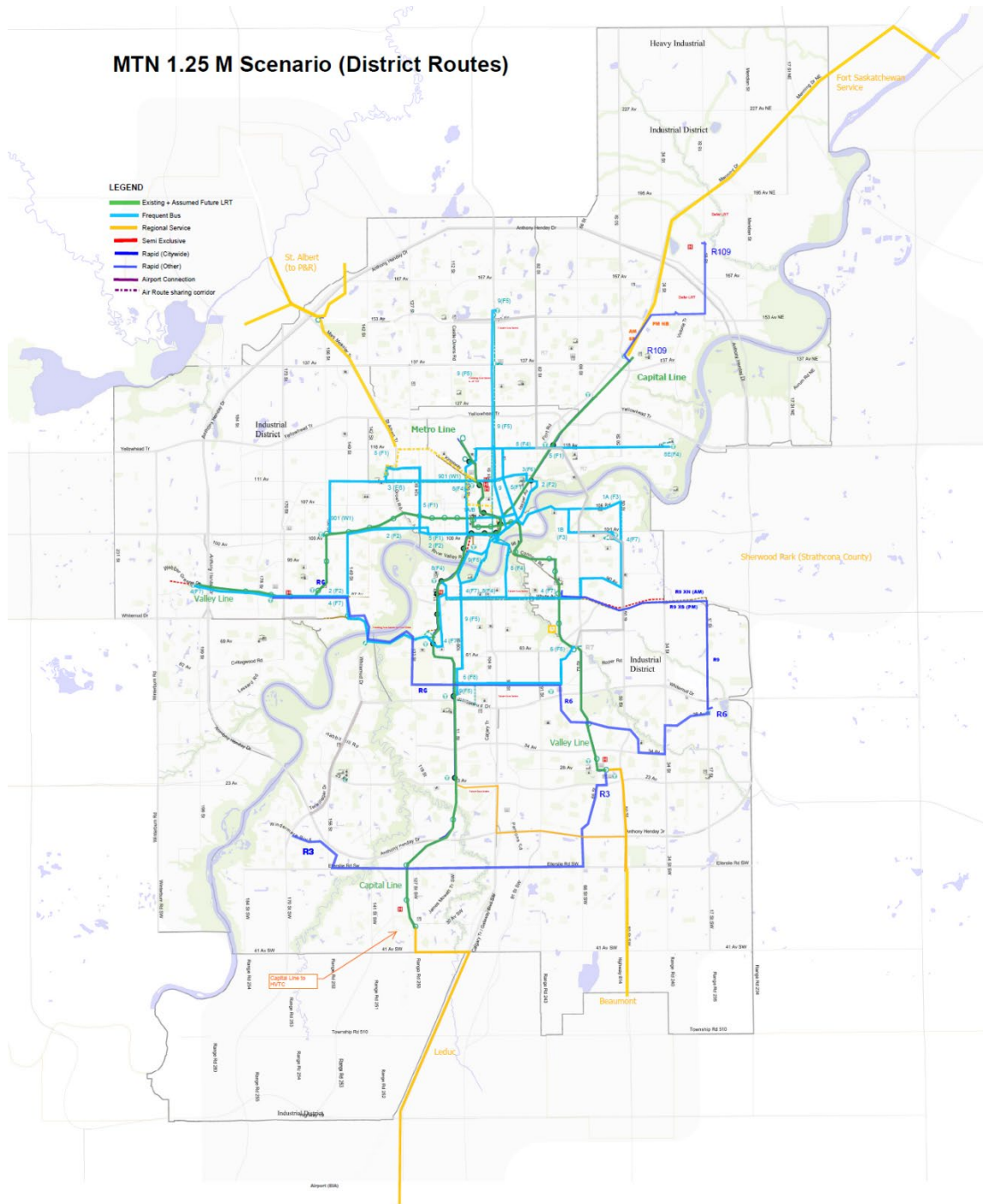
District Elements

Exhibit 5.3 is a map of the recommended interim network, focusing on the district routes. (The LRT lines are included for geographic reference since many of these routes terminate at transit centres adjacent to stations.)

RapidBus3 (R3): Windermere District Node – Mill Woods Node

R3 is a proposed rapid route operating west-east between Windermere and Mill Woods, which will extend in the future to the Meadows district nodes. It will connect several development nodes as well as the Ellerslie Road corridor in the southern part of the city. Further into the future, there could also be potential for this route to be extended via mixed traffic to the Riverview area west of the river, depending on how travel patterns evolve.

Exhibit 5.3: Mass Transit at 1.25 Million Population Horizon – District Routes



RapidBus6 (R6): WEM/Misericordia Node –Meadows North District Node

The R6 is a proposed rapid route going east-west between WEM/Misericordia Node and Meadows North District Node primarily along Whitemud Drive, 51 Avenue, and 38 Avenue. Design for this service will consider its potential relationship with crosstown service on Whitemud Drive and with local services in the eastern part of Mill Woods.

RapidBus9 (R9): Bonnie Doon District Node – Meadows North District Node

R9 is a proposed east-west rapid route between Bonnie Doon district node and Meadows North district node primarily along 82 Avenue, 76 Avenue, and 17 Street. It would provide key linkages to the B2, Valley Line, B5C, R3, and B5 routes.

This route initially serves commute trips in two directions during peak periods. There is also a parallel peak express route (500X) that skips the 76 Avenue corridor; there are opportunities for these two services to be scheduled to provide alternating service along the two routes, since they both pass through Bonnie Doon station and the transit centre in Meadows.

Rapid Bus 109 (R109): Edmonton Energy Park Area – Clareview Major Node

Route R109 is a proposed rapid bus connection into the northeast residential and employment districts, with termini proposed at the Clareview major node and serving Alberta Hospital. The northern terminus may be a temporary on-street layover or could continue towards Edmonton Energy Park. Much of this route's initial projected demand relates to a transitional park and ride opportunity at the future Gorman station site. This route is intended to operate – in peak periods at a minimum – until the Capital Line is extended northeast, well after the 1.25 million horizon.

5.1.5. Frequent Routes (District Services)

The names of the urban frequent are indication of where they are located within the city. Routes passing through the centre of the city have the 'F' designation carried over from the upcoming BNR, while N, SE, SW, and W routes extend into city quadrants. The near-term numbering of these routes (the ETS designation appearing on buses) is also identified.

- **F1 Route: Westmount District Node – Exhibition District Node (ETS #5).** The proposed F1 east-west route connects the Westmount and Exhibition district nodes travelling mainly along 124 Street, Jasper Avenue, 97 Street, and 118 Avenue.
- **F2 Route: Stadium LRT-WEM/Misericordia Major Node (ETS #2).** F2 is a proposed route operating crosstown from Stadium LRT to WEM/Misericordia Major Node to, connecting the following traveling along Jasper Avenue, 102 Avenue, 142 Street and 87 Street.
- **F3 Route: Centre City – Capilano District Node (ETS #1A/1B).** The F3 east-west route connects Centre City to Capilano district node travelling mainly along Jasper and 98 Avenue.
- **F4 Route: University Major Node – 118 Avenue Primary Corridor (ETS #8).** The proposed F4 is an S-shaped route to connect University Station and the east limit of 118 Avenue primary corridor travelling mainly along 82 Avenue, 99 Street, Jasper Avenue, 109 Street, and 118 Avenue and it expected to serve nodes and corridors well.
- **F5 Route: Eaux Claires – Southgate District Node (ETS #9).** BNR line F5 is a north-south route travelling mainly along 97 Street, 101 Street, 105 Street/109 Street. It will provide linkages to the Capital Line, B2, Metro, Valley, B1, R8, and R12.
- **F6 Route: Westmount – Stadium LRT (ETS #3).** This line will operate on 111 Avenue, providing frequent local service immediately north of the downtown core.
- **F7 Route: Lewis Farms – Capilano District Node (ETS #4).** The proposed F7 east-west transit service between Lewis Farms and Capilano travels mainly along 87 Street,

Whitemud, Fox Drive, 114 Street, and 82 Avenue. Despite competing with other mass transit network services (such as B2) along much of its length, this route is attractive to passengers. It serves several higher-density areas, and since its stop spacing is closer than B2, it provides a complementary service.

- **F8 Route: Southgate District Node – Davies LRT (ETS #6).** This line will operate on 51 Avenue, providing a connection between Capital Line LRT, B1 and Valley Line LRT, as well as service along a secondary corridor.
- **W1 Route: Stony Plain Road Primary Corridor – Centre City (ETS #901).** The W1 proposed east-west line connects Jasper Place within the Stony Plain Road primary corridor and Centre City travelling mainly along 107 Avenue. It would provide linkages to the Valley Line, R12, Metro Line and B1.

5.1.6. Other ETS Services

The Bus Network Redesign (BNR) carried out as part of the Transit Strategy (2017) includes restructuring of the network to address customer service objectives, and to reshape the system around the introduction of Valley Line SE LRT later in 2021.

The same principles were carried forward by ETS and planning staff to define the underlying transit services for the 1.25 Million population horizon, and this set of routes is included in the transit plan. Where there is some duplication of service, or a mix of local and rapid services in the same corridors, future headways would be adjusted to optimize how demand is served and the transit fleet deployed.

5.1.7. Regional Service Assumptions

Regional services are subject to decisions made by the regions and municipalities in the Edmonton Metropolitan Region. For the analyses in this report, the set of services currently provided to and from surrounding cities is included in the demand model, including refinements to include proposals from the RTSC business case. Some of the regional proposals included significant portions of routes within Edmonton, and these are represented either as regional routes in the current analysis, or by proposed semi-exclusive and rapid routes that had already been identified during The City Plan Mass Transit Study.

Significant connections include:

- St. Albert routes connecting into Edmonton. Local routes were assumed to terminate at Campbell Road, and express routes at West Edmonton Mall, University of Alberta, NAIT, and downtown;
- Service between Fort Saskatchewan and the Capital Line NE;
- Services between Strathcona County and Edmonton, including continuation of existing express routes to University of Alberta, downtown and NAIT, and potential future connections to the Capital Line outside of downtown to the northeast;
- Beaumont and Leduc to Valley Line and Capital Line LRT stations;
- Services from Parkland County, Spruce Grove and Stony Plain, with express services being considered to Metro Line or to Westmount TC, and shorter distance services from locations such as Big Lake and Acheson connecting to Valley Line stations.

The exact routing and the operations of these routes in the future are outside the scope of this current study.

5.2. Summary of Routes

Exhibit 5.4 presents a rolled-up summary of the mass transit routes in the LRT, semi-exclusive, rapid bus and airport connector categories. The table includes information on the round-trip distance, the one-way length of the route, and how much of each falls into different categories of Right of Way. These distances are based on the interim stages of each route as presented in the map (Exhibit 5.1). Refer also to Appendix A for additional maps of this interim network.

Exhibit 5.4: Characteristics of Mass Transit Elements – 1.25 Million Population Horizon

Line Name	Principal Alignment(s)	Endpoints	Directional Route-km	One-way distance	LRT (km)	Semi-Exclusive Bus (km)	Mixed Bus (km)
Citywide Transit Routes (at Interim 1.25 Million Horizon)							
Metro Line		Blatchford – Health Sciences	16.9	8.5	8.47		
Capital Line		Clareview – Heritage Valley District Node	54.1	27.1	27.1		
Valley Line		Lewis Farms - Mill Woods Node	54.4	27.2	27.2		
B1	153 Av, 97 St, Calgary Tr, Gateway	Campbell Rd - Castle Downs Node - Century Park Node	60.0	30.0		16.0	14.0
B2	Whyte Av, 87 Av	WEM/Misericordia Node – Bonnie Doon Node	29.1	14.6		4.3	10.3
B4	137 Av, 170 St	Clareview Node - WEM/Misericordia Node	48.3	24.2			24.2
B5	23 Av, 17 St	Century Park – Meadows North Node	27.0	13.5		1.8	11.7
B6	Terwillegar Expressway	University/Garneau Node – Windermere Hub	29.3	14.7		10.3	4.4
Airport Connector	Hwy QE2, Calgary Tr, Gateway	Centre City – Edmonton International Airport	63.0	31.5		5.1	26.4
RapidBus12 (R12)	118 Av, Kingsway, 111 Av, 163 St	WEM/Misericordia Node – Clareview Node	48.3	24.1			24.1
B5C (50 Street-Exhibition)	50 St (north of 23 Av)	Mill Woods Node – Exhibition Node	30.0	15.0			15.0
District Transit Routes (at Interim 1.25 Million Horizon)							
RapidBus3 (R3)	Ellerslie Rd	Windermere Node – Mill Woods Node	34.3	17.1			17.1
RapidBus6 (R6)	51 Av	WEM/Misericordia Node – Meadows North Node	53.6	26.8			26.8
RapidBus9 (R9)	76 Av	Bonnie Doon District Node – Meadows North Node	20.1	10.1			10.1
RapidBus109 (R109)	153 Av, 18 St	Edmonton Energy Park Area – Clareview Node	15.9	8.0			8.0
Approximate Network Extents			Overlaps between routes		4.0	9.0	5.0
for Exclusive, Semi-Excl., and Rapid			Net distance for network elements (km)		59	29	189

Exhibit 5.4, continued

Line Name	Principal Alignment(s)	Endpoints	Directional Route-km	One-way distance	LRT (km)	Semi-Exclusive Bus (km)	Mixed Bus (km)
Frequent Routes (part of District Network)							
5 (F1)	124 St, Jasper Av, 97 St, 118 Av NW	Westmount Node-Coliseum	25.6	12.8			12.8
2(F2)	Jasper Av, 102 Av, 142 St, 87 Av	Stadium - WEM/Misericordia	29	14.5			14.5
1A/1B (F3)	504 Av, 106Av, 76 St, 101 Av, 50 St	Capilano-Downtown	16.5	8.3			8.3
8 (F4)	112 St, 82 Av, 99 St/ Scona, Jasper, 109 St	University Stn - Abbottsfield	39.5	19.7			19.7
9 (F5)	97 St, 101 St, Bellamy Hill, 105 St/109 St	Eaux Claires - Southgate	31.5	15.8			15.8
3 (F6)	111 St	Westmount-Stadium	12.7	6.4			6.4
4 (F7)	87 St, Whitemud, Fox Dr, 114 St, 82 Av	Lewis Farms - Capilano	53.3	26.7			26.7
6 (F8)	51 Av	Southgate - Davies	14	7			7
901 (W1)	107 Av	Jasper Place - Downtown/ 101 Street	18.3	9.2			9.2
Total Frequent routes, km (includes some overlaps)							120

5.3. Order of Magnitude Costs

The capital costs for the recommended network have been estimated to determine the incremental costs beyond the future base, which already includes existing and planned services for the City of Edmonton.

The costs in Exhibit 5.5 are based on typical unit rates for transit construction and on the incremental quantities of infrastructure and transit vehicles implied by the recommended interim network. Major items are as follows:

- Expansion of the Capital Line LRT south to Heritage Valley Major Node. The estimate shown was previously provided by city staff, and is based on an extension by two stations;
- Bus lane modifications and BRT stop/station installations along the portions of routes B1, B2 and B5 proposed to advance towards semi-exclusive operations;
- Articulated vehicles for the semi-exclusive/BRT routes, including the portions initially operating in mixed traffic;
- An allowance for rapid bus stops to be installed along all planned 'R' routes, including the portions of the B1, B2 and B5 that will operate in mixed traffic. This allowance is to provide for expansion of bus stops or installation of new stops, to allow the limited stop routes their own space adjacent to any local services.
- Additional transit buses to operate the net increase in bus service associated with the rapid bus routes (based on Section 3.2). The rapid routes fully or partially replace some future base service, so this increase assumes reallocation of buses;
- The increased bus fleets for the addition of BRT and rapid services will be factored into planning for bus garages by ETS. This cost would be in addition to what is shown in the exhibit.

Exhibit 5.5: Order of Magnitude Capital Costs (Increment over Future Base)

Proposed Element	Cost - Conceptual
LRT Extension of Capital Line, including vehicles ¹	\$ 325,000,000
BRT vehicles, stations, and initial lane conversions ²	\$ 220,000,000
Rapid Bus stops and additional buses ²	\$ 50,000,000
Incremental Cost over Future Base	\$ 595,000,000

Note 1: LRT costs for Capital Line South from Report: CR_8337, Att. 3.

Note 2: BRT and rapid bus costs are conceptual, subject to a -50%/+100% cost range due to potential for changes as the project is developed.

These costs do not include the entire interim network for 1.25 Million, which is largely comprised of existing and planned services. Some have committed funding and others are related to planned growth of the city.

Future Base Items Excluded from Mass Transit Incremental Cost

Major items in the future base, and therefore not counted in the mass transit costs, include:

- LRT services that either exist, have construction underway, or have committed funding. These include:
 - Existing Capital Line from Clareview to Century Park;
 - Extension of Capital Line to Ellerslie Road SW;

- Valley Line, eastern and western segments, from Mill Woods to Lewis Farms;
- the existing Metro Line to NAIT;
- Metro Line extension now under construction to Blatchford Gate.
- LRVs to operate these services at a 5-minute peak headway, plus spare vehicles. This would include new vehicles and replacements for aging vehicles.
- The southwest BRT service on Terwillegar Expressway to South Campus, including dedicated lanes and buses to operate the route;
- Planned future bus services, including:
 - 2021 implementation of the Bus Network Redesign, including frequent routes, rapid routes, peak rapid/express, crosstown, local and community shuttles.
 - Expansion of bus service into growth areas between 2021 and the 1.25 Million population horizon. This would represent approximately 25% more buses in service than today, and installation of new bus stops.
 - Ongoing bus fleet renewal, replacement, and technological innovation.
 - As noted above, expansion of the bus fleet is accommodated by new bus garage facilities, and these are outside the costs shown above.
- Changes related to regional services in the future.

5.4. Success Factors

As a foundation to the definition of future transit network options for this study, a review of several peer agencies and background industry technical reports was conducted, with the results documented in the *Mass Transit Backgrounder*. The key lessons from this review were applied during the entire study, and many of the key elements of a successful mass transit network were demonstrated in the Ultimate Mass Transit Network defined for the 2 Million population horizon, as documented in Section 2.1.

Given that the **1.25 Million horizon** is an **interim state**, some of the measures of success are less complete for the partially implemented Mass Transit Network. However, since the developed portion of Edmonton will have a smaller footprint, a smaller network will still meet many of the requirements.

The following factors are common to other transit networks (or strong-performing portions of networks) across North America:

- Supportive urban form and densities (measured as number of people and jobs located near rapid transit stations);
- Length of exclusive right-of-way transit available, and the strongly related travel time competitiveness with the car; and
- Frequent Transit Network (FTN) coverage.

Exhibit 5.6 recaps the summary of key measures of success and major lessons learned identified through the peer review. Most of these measures relate directly to the mass transit and the land use around mass transit station locations. Measures such as these were applied to define network elements for the evaluation scenarios in the previous stage of the study, and the implementation options evaluated in this current report.

As identified in the following pages, the interim mass transit network begins to address all the factors that were previously defined as key descriptors of a successful mass transit network. The success factors were an input to the definition of the interim network scenarios, and the factors were also a key consideration in selecting the elements carried forward from that evaluation.

Exhibit 5.6: Key Measures of Success for Mass Transit

Number of residents and jobs located near mass transit stations

This promotes the network serving more passengers, and supporting land use objectives in The City Plan

Most City-wide and District routes, including the LRT, connect to major nodes and primary corridors in The City Plan land use concept.

The focus of the interim network is on adding service to nodes and corridors where investment is planned to stimulate development, and in growth areas around and within the current built-up footprint of the City.



Images are examples illustrating the concepts.

Length of exclusive and semi-exclusive right-of-way transit available

Reflects speed and reliability for transit dependent and choice riders; *also supports travel time*

The proposed mass transit network includes planned extensions of the Valley Line to Lewis Farms and proposed LRT extensions to Heritage Valley Major Node. It also includes and semi-exclusive transit routes B1, B2, B5 (east portion) and B6. These will increase the length of exclusive and semi exclusive ROW of Edmonton's mass transit network from 24 km now (37 km when Valley Line Southeast opens) to over 90 km for the interim network.



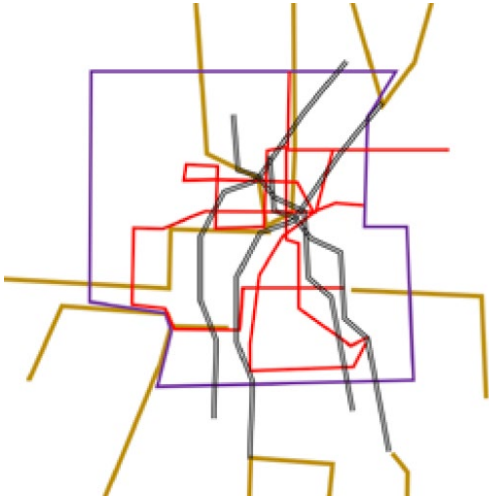
Frequent Transit Network (FTN) coverage

Connectivity beyond basic rapid transit, integration of services

All parts of the city will have at least one transit route with frequent service within 1km, due to the grid structure of the mass transit network

Core areas of the city will be served by a variety of exclusive, semi-exclusive, rapid and frequent routes offering more localized service.

Outer parts of the City, including growth areas to the southwest, southeast and west, will gain new rapid bus routes as a starting point for mass transit.



Travel time competitiveness with the car

Support mode share and sustainability objectives

Higher mode shares result in most parts of the city, including harder-to-serve employment areas, due to introduction of higher-speed semi-exclusive routes and a network of rapid and frequent routes.

The projected all-day mode share with the proposed interim network will be 9.3%, an increase from the recent 8.3% (based on the most recent travel survey in 2015).

Just maintaining the past transit share requires investment keeping pace (or more) with population; generating a future increase comes from some trip types becoming more attractive by transit than currently.



Multiple anchor destinations along mass transit

Increases ridership and spreads demand across more of the day

The mass transit network achieves this through expansion of service types and additional capacity options between major origins and destinations.

The anchor destinations include Centre City node, University/Garneau, Mill Woods, Heritage Valley, West Edmonton Mall /Misericordia, Blatchford-NAIT-Kingsway and Clareview Major Nodes and all of these are served by various mass transit routes.



Parking cost/availability at destination(s)

Higher parking prices are a stronger deterrent to drive-alone travel than fuel or the 'sunk costs' of auto ownership.

While general parking policy goes beyond the scope of the mass transit strategy, new park and ride would be focused at ends of the rapid transit lines to create a catchment area feeding into transit. In other locations, parking would be tied in with development objectives, with mobility hubs providing parking where consistent with their function, and then redeveloping some or all parking as more travel shifts to other transit routes and relies less on parking supply.



Speed, reliability and capacity measures

Operating transit in mixed traffic tends to reach a capacity limitation sooner, often due to platform (sidewalk) space at stations. In addition, the speed and reliability of mixed operations can reduce how many transit vehicles can operate along the route during peak hour. The impacts on travel speed therefore have a knock-on effect on capacity.

Implementing exclusive and semi-exclusive ROW with priority measures help to sustain higher-capacity service. The mass transit network includes extensions of the Capital, Metro and Valley Lines, and proposed new semi-exclusive routes B1, B2, B4, B5 and B6 (some of which may be BRT routes). In addition, priority measures for other routes, such as the ‘R’ series of limited stop Rapid routes, helps distribute this benefit around the city.



Limited stop buses

A highly flexible form of mass transit, with some limitations due to operations in traffic; nevertheless, these routes can be highly productive, especially when linked to a major destination.

In addition to the ‘B’ series of routes that may be bus or rail, the ‘R’ rapid bus routes form a grid with services between major nodes and providing a two-way grid of crosstown connections.

The interim network focuses on areas where higher demand and land use support warranted implementation of service. This network includes approximately half of the ultimate route coverage and frequency.

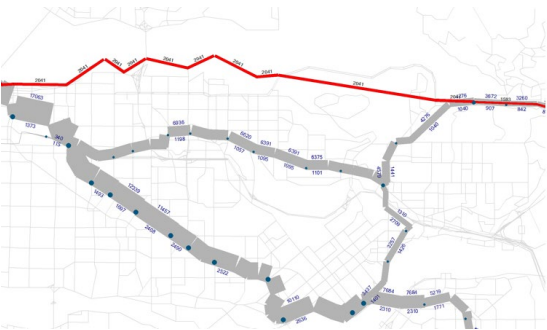


Operations in different parallel corridors

This approach helps match the demand more effectively with capacity, with the added benefit of providing limited stop service to other passengers.

Analysis of the interim horizon focused on capacity-constrained modelling which caps transit volumes on each route.

Many of the major nodes and transit terminals are served by multiple routes in the mass transit network, in addition to local bus routes. A specific case where parallel services are critical is the north-south travel to areas between downtown and the airport. While the Capital Line is planned to be extended to Heritage Valley Major Node, new Airport Connector routes and B1 (stopping 1-1.5 km) help to serve the employment areas parallel to 111 Street and offload some of the potential excess demand from the Capital Line. Similar offloading can be expected from the B6 route.





6. Developing the Network

The mass transit network will require implementation that stages the network, so it is developed in response to existing transit demand and capturing future ridership demand. It is also critical that the network be developed in manner the helps support components of The City Plan, in particular the land use concept. Finally, the next steps for this study and beyond are outlined to conclude this chapter.

6.1. Concept Staging

The Ultimate Mass Transit Network defined in conjunction with The City Plan represented the transit services available over a long-term horizon for a city with 2 million residents. This doubling in size will take several decades. As the city grows, the population increase will also mean that more public funding is available for transit operations. The extent of the transit system will gradually increase over time, through introduction of new types of service, new routes, and increased frequency. Staging is typically carried out under the guidance of shorter-term strategic and investment plans focusing on 4-year and 10-year time periods.

The COVID-19 pandemic has had a marked influence on travel patterns in the short term (2020-2021), and due diligence through monitoring of ridership recovery and the emergence of any new patterns will no doubt influence the first few years of this plan. That is part of the reason the 1.25 Million horizon has been given a range of 10 to 15 years in the future.

The mass transit network is expected to be deployed over time, with several opportunities and constraints factoring into the staging.

Existing ridership demand and desired lines can provide a starting point for developing and expanding Edmonton's current mass transit network (mainly dominated by LRT). The result will be building the network logically through extensions or new mass transit lines (where the infrastructure/technology allows for exclusive or semi-exclusive ROW) connecting to current demand and to where already existing services exist (ideally coalescing around at least one mobility hub location). Additionally, the potential to capture future ridership (through future land development, or direct/fast connections) should be considered as the mass transit network is developed.

- The interim network proposed in Section 5 assumes extension of the Valley Line to Lewis Farms, and of the Capital Line to Ellerslie Road SW. It proposes a further extension to Heritage Valley Town Centre.
- The proposed interim network consolidates and extends the Terwillegar Bus Lanes project past South Campus to University Station, thereby adding capacity parallel to the Capital Line at its peak demand point and making the route (B6) itself more attractive by offering direct service.
- The north-south B1 service provides service into northwest Edmonton in advance of the future extension of the Metro Line, and south of downtown, this new route adds future capacity and opens new transit travel markets.

There will be a need to further evaluate the best solution to Capital Line capacity issues. Additional routes such as B1 and B6 can also mitigate capacity issues in the south which may be an effective way to address the LRT 'pinch point' that occurs in the peak hour between Health Sciences and South Campus stations. Solutions may include combinations of measures directly related to the Capital Line operations, and introduction of other services.

The rationale for projects can and should be linked to city building opportunities. The City Plan land use concept proposes its own staging plan for different types of development, and the deployment of transit infrastructure and services can provide support and be a catalyst for the land use initiatives and transit-oriented development.

- East-west corridors such as Whyte Avenue (B2) and 118 Avenue (R12) are supported by implementation of new semi-exclusive and rapid routes.

Financial resources available during a given period mean that certain projects will be prioritized while others are deferred until more funding becomes available.

- The implementation of B1 on 97 Street and 153 Avenue provides a lower-cost and easier to implement building block for eventual extension of the Metro Line north from Blatchford. The ML extension requires a costly bridge to carry the LRT over the Yellowhead and CN yards, and this also introduces a long gap between feasible station locations.
- Some of the longer-term rapid bus services within the existing built area of Edmonton have been deferred to post-1.25 million, focusing investment on higher ridership and more strategic corridors to start with. Some of these corridors, such as 111 Avenue, are projected to achieve high demand in the future as infill development occurs, and in the meantime can be served by planned services such as F6 (ETS route 3).

Some forms of capital construction can be converted from one mode to another, but this will have significant capital cost and design implications. (I.e. new bridges or tunnels built for transit). Designing and building for multiple modes can introduce extra design features, requirements and costs which become 'throw away' after the transition. Furthermore, upgrading to new infrastructure requirements requires shut down or diversion to existing services causing disruption to mobility options.

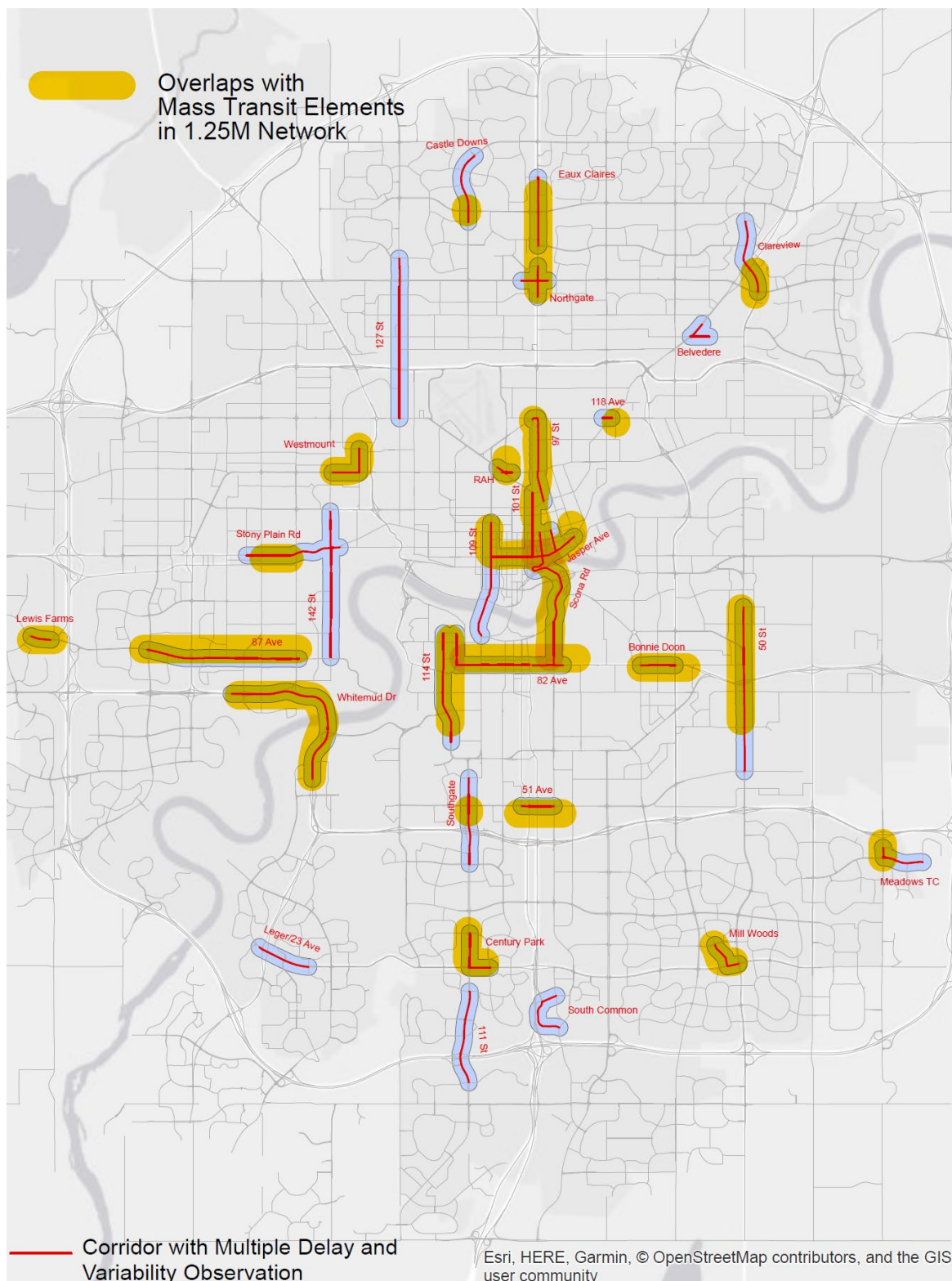
- Addition of more frequent Metro Line and Capital Line service through the downtown tunnel and across the grade crossings south of Health Sciences is currently constrained by several technical factors. The frequencies of each route during the peak are capped, with 18 trains per hour per direction assumed in the tunnel, and no more than 12 per hour at the grade crossings.
- Addressing these constraints may become more feasible once other mass transit options are available, so that construction to upgrade these lines can take place (replacement of signals and other upgrades to LRT typically require reduced service or bus bridging around the site to carry out upgrades). The interim network includes new routes that could form part of the building block to this enhancement strategy such as the incorporation of the south leg of B1 into semi-exclusive route and extension of B6 to University major node. With these routes in place, the transitional upgrades might then become feasible post-1.25 million.

Some services may be introduced in a less capital-intensive form sooner (for example a rapid or limited stop bus) and then be converted in part or in full to semi-exclusive or exclusive transit as needs arise.

- This approach has been taken with partial implementation of bus lanes assumed on B1, B2, and B5.

There will also be opportunities to implement Transit Priority Measures (TPM) at hot spots – either existing or emerging. These TPMs may include physical measures, as well as lane management/regulatory and signal operations modifications. Many corridors across the city could potentially warrant TPM implementation, including sections of 97 Street, 101 Street, and longer sections of arterials approaching key mobility hubs (such as Century Park and Mill Woods.) Exhibit 6.1 shows the overlap between mass transit elements and potential TPM implementation corridors.

Exhibit 6.1: Potential Locations for Transit Priority (Within 10-15 Years)

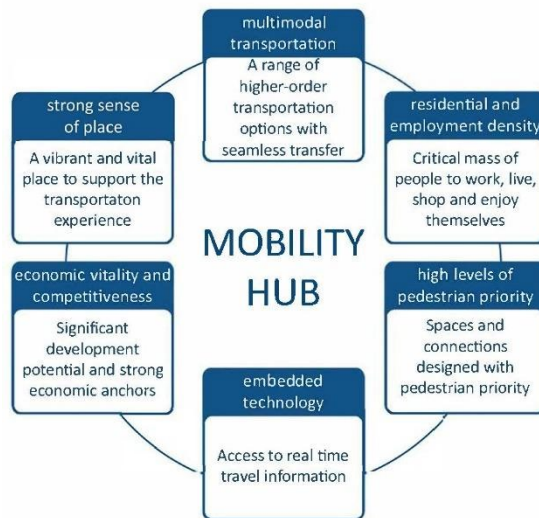


6.2. Mobility Hubs

The mass transit network recommendations for 1.25 million can be further refined by identifying intermodal transit hub locations, based on transportation and land use considerations that will emerge during the first quarter of development towards the ultimate 2 million. These intermodal sites are referred to as mobility hubs and are an important form of investment in transit infrastructure and help to support and incentivize large scale transit-oriented development. They tie important pieces of the proposed land use and transit strategies together.

A mobility hub is more than just a transit station. Mobility hubs consist of major transit stations and the surrounding area. They serve a critical function in the regional transportation system as the origin, destination, or transfer point for a significant portion of trips. They are places of connectivity where different modes of transportation – from walking to riding transit – come together seamlessly and where there is a concentration of working, living, shopping and/or playing. They are an important form of investment in transit infrastructure and help to support and incentivize large scale transit-oriented development. They tie important pieces of the proposed land use and transit strategies together. The key elements of a successful mobility hub are illustrated in Exhibit 6.2.

Exhibit 6.2: Mobility Hub Elements



Mobility hubs vary in size, but generally comprise the transit station and surrounding area that can be comfortably accessed by foot, approximately an 800-metre radius. However, the actual hub boundary should be determined based on the specific physical characteristics, neighbourhood context, and planning framework of the area. Of the mobility hub concept locations nominated for the Edmonton area, there is a range between existing sites and those that are envisioned after rapid transit investment. Many existing sites offer little more than vast parking lots, while others are easily accessible by many modes and are already vibrant places of activity and destinations in themselves.

Mobility Hubs are strategically located in nodes or can be centred on a mass transit station. They serve as critical places for trip origins, destinations and transfer points. Furthermore, they create connectivity to different modes, supporting a mobility system that allows people to seamlessly move from one travel option to another and to conveniently fulfill their daily needs. This is where different modes of transportation come together including walking, biking, transit and shared mobility options to create connections within Edmonton and to the region. Existing

examples of possible emerging mobility hubs where key connections between routes are made could include Century Park and West Edmonton Mall.

The provision of a safe transportation system is a cornerstone of The City Plan. Given the fact that most transit users are pedestrians during the first, last and transfer components of their trips, pedestrian safety is a major concern. These users need safe and efficient routes when accessing stations and while making multi-modal transfers. They rely on existing active transportation networks.

Selection of these functional types of mobility hubs was made based on identifying key City Plan nodes and key transportation intersection points that were candidates to fit the primary function for each of these types of mobility hubs:

- **Entry hubs:** Typically situated at or near the end of the high-capacity mass transit lines;
- **Transfer hubs:** Areas of significant network transfer points that combine higher volumes of passengers with a proposed land use node or location along a designated development corridor.
- **Destination hubs:** Identified as the Major Nodes from The City Plan Concept, since these are planned to act as both employment centres (destinations) and as origins and transfer points for people movement.




Exhibit 6.3 describes the characteristics of the mobility hub locations and provides high-level guidance as to the typical features of each hub. The locations of the hubs in each category are also listed for reference. It should be recognized that each mobility hub location may serve more than one function. Therefore, the typologies assigned to each location serve as preliminary identification of each mobility hub's primary function. It is expected that further study and planning will identify and incorporate other secondary functions of each mobility hub in parallel to land use planning for infill development.

Planning Steps

Common early steps to plan for and start to implement Mobility Hubs include the following suggestions:

1. Reviewing the existing planning context for the location, including regional, municipal and neighbourhoods plans. This assists in determining what elements of a hub would align with existing plans and community values. Where plans are due for a refresh, this presents an opportunity to incorporate stakeholder and community input into the process as the mobility hub is introduced as a concept.
2. Carrying out an inventory of study area infrastructure and land parcels to identify available capacity, constraints and opportunities. These steps are important where the vision for the hub is to encourage or help support redevelopment or infill, consistent with the vision in The City Plan for the study area. Since some mobility hubs are constructed adjacent to or jointly with developments, it is important to understand how feasible development would be, what form it might take, and when it may be triggered.
3. Defining guiding principles for the hub, such as what specific objectives it will have, and how it relates to the surrounding community.
4. Developing options and selecting a concept plan. Again, with input from community stakeholders, a recommended built form, and proposed infrastructure and streetscape modifications are developed. A staging plan that includes lead and supporting partners is also drafted to help carry forward momentum. Partnerships are typically needed in the areas of planning, services and elements, land development and funding.

Exhibit 6.3: Proposed Mobility Hub Typologies and Design Guidance – for the Edmonton Mass Transit Study

Typology	Examples	Description
Entry Hubs	 <p>Ellerslie District Windermere</p>	<ul style="list-style-type: none"> Typically situated at or near the end of the high-capacity mass transit lines. Existing development forms and transportation network generally auto oriented. Growing market for mixed use development with significant developable land available including high development potential.
Transfer Hubs	 <p>Whyte Avenue Century Park Jasper Place Bonnie Doon Castle Downs</p>	<ul style="list-style-type: none"> Areas of significant network transfer points that combine higher volumes of passengers with a proposed land use node or location along a designated development corridor. Major and local centres with a mix of uses and moderate to high densities. Some developable land availability. Development opportunities primarily through infill.
Destination Hubs	 <p>Downtown City Centre University of Alberta West Edmonton Mall</p>	<ul style="list-style-type: none"> Identified as the Major Nodes from The City Plan Concept. Regional centre with mature mix and scale of development, multiple destinations, and high densities. Universities, Colleges, Airports in varying urban contexts. Large trip generators. Good pedestrian environment with well connected, walkable street network. Limited developable land availability. Development opportunities primarily through infill.

The proposed locations of mobility hubs in the City of Edmonton are identified on Exhibit 6.4. A general explanation of what could take place at these hubs follows.

Entry Hubs

- The NW Metro Line hub will form around the future extension of the Metro Line to the Campbell Road station. The City of St. Albert owns land near the future station and in 2020 opened the Naki Transit Centre, which includes a bus terminal and large park and ride lot. The City of Edmonton will want to include mobility hub considerations in the station area planning for this location, in advance of construction, which is expected post-1.25 million.
- Horse Hills is deferred to post-1.5 million since much of the development in that part of the city is not staged to occur until then, which would become a trigger for Capital Line extension.
- A hub at Lewis Farms should be under consideration as soon as possible, building on the existing transit centre and responding to any opportunities related to the construction of Valley Line West, which will commence imminently.
- Windermere Centre hub requires decisions to be made around the optimal location for the major transit exchange in this corner of the city. The current Ambleside location may see many of the functions shift to a larger transit centre in Glenridding. Once this has been resolved, planning of the joint hub and transit centre should begin, given that the area around this hub is projected to see significant residential growth and high transit mode shares. The B6 route would be modified as necessary to serve the major hub.
- The 'New Southwest Node' on SW 41 Avenue will be triggered by plans to extend the Capital Line to its terminus in the Heritage Valley Major Node. Based on the recommendations of this report, that extension will take place once development of lands south of SW 41 begins in earnest, which is likely after the initial 10-15-year window.
- Ellerslie District hub is planned to include a park and ride and be connected by frequent limited-stop bus service to Mill Woods LRT station and Transit Centre. The initial hub should consider street-facing land uses. The park and ride would feature transitional surface parking set back from the arterial streets, and ideally this will be laid out in modules of a suitable size for staged redevelopment in the medium to longer-term.

Transfer Hubs

- Castle Downs: In keeping with the recommendation to initiate B1 service through Castle Downs, this hub would initially focus on the operations of the new route, and how this would be integrated with the transit centre in this area. The planning process for the transit infrastructure and adjacent land uses would also need to consider staging considerations for the future extension of the Metro Line.
- Exhibition: This hub has the potential to build from the existing transit centre at Coliseum LRT and feed into planning processes related to the Exhibition lands. Several of the new mass transit routes will connect or terminate at this hub.
- Jasper Place: This location represents an opportunity to link existing commercial areas and the transit exchange in the area with the Valley Line. Planning here may need several smaller stages to advance as the area is constrained and the streets where the LRT is being constructed will not lend themselves directly to high numbers of connecting buses.
- South Campus: New mass transit services will either pass close to or connect directly to the LRT station and some reconfiguration of stops may be required to optimize operations. Given that University of Alberta regularly undertakes planning initiatives, a

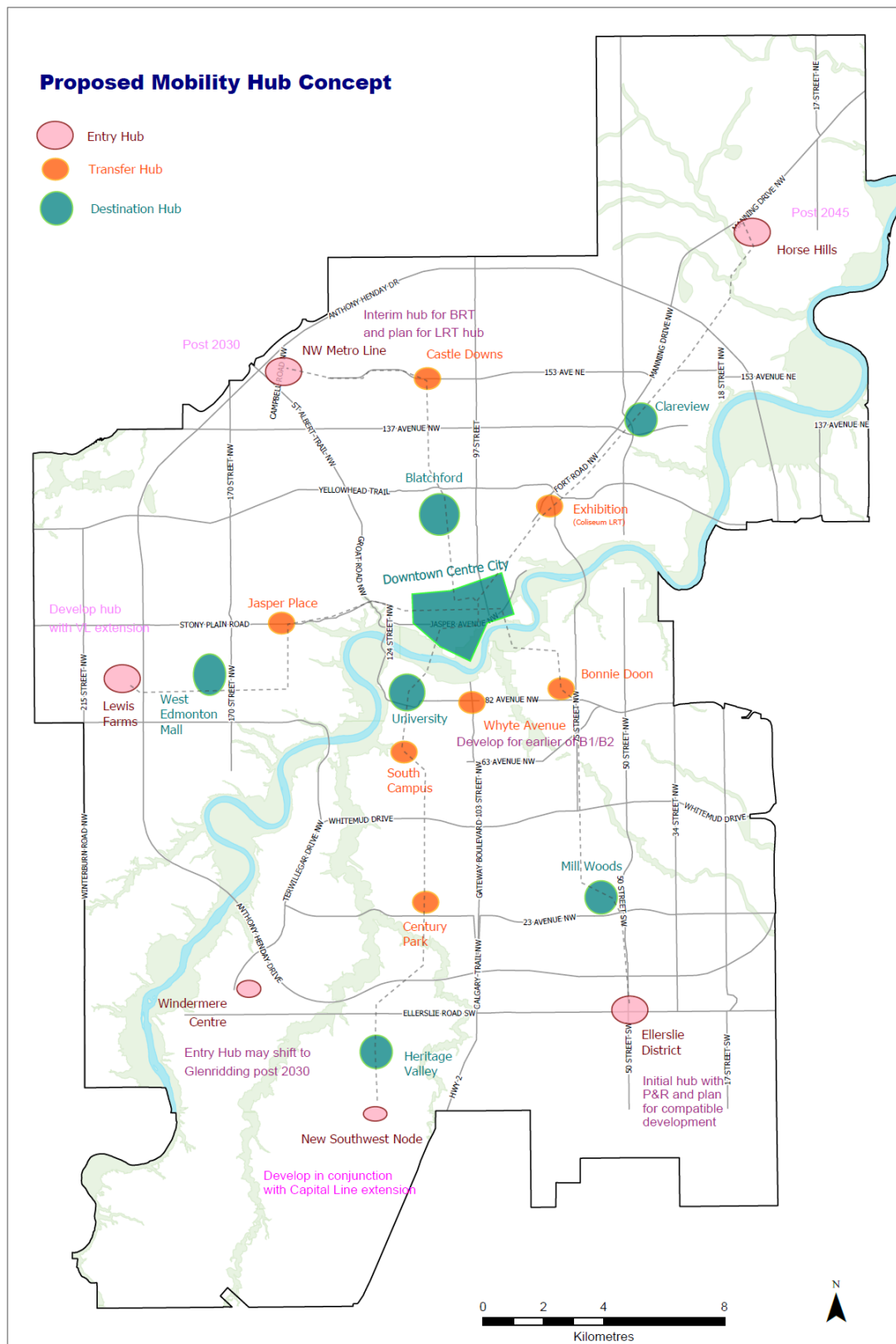
review of transit needs and transit-friendly development opportunities around this hub should feed into that process.

- Whyte Avenue: This future hub is already served east-west by several frequent bus routes. It will become a transfer point once the B1 service is implemented. As part of the planning for those stops, which may be split northbound/southbound onto different streets, active modes connections, public spaces and development plans in nearby parts of Whyte Avenue will need to be included in planning for this connection.
- Century Park: This is an existing LRT station and bus transit center that will remain important even after the Capital Line is extended farther south. There will be need here to re-organize the bus operations to accommodate new routes such as B1 and B5. In addition to these needs, there may be opportunities at such time the site undergoes renovation or redevelopment.
- Bonnie Doon. This near-future LRT station will be a terminal point for the B2 route, and potentially an intercept point for some regional services. Again, over time this area may evolve in response to the additional transit services.
- In addition to the hubs noted on the map, there are existing locations where transit centres are adjacent to commercial areas (such as Northgate and Southgate), and efforts to enhance the integration and urban design of these locations may take place as needs and opportunities arise at those locations.

Destination Hubs

- These include Centre City Node, Blatchford, Clareview, Mill Woods, Heritage Valley and West Edmonton Mall Major Nodes.
- These areas have already undergone planning processes, and so more of the focus in defining mobility hub features will be to determine the major passenger destinations, flows to/from/between transit services, and how the active modes network and public spaces in these hub areas will function together.
- Each of these should undergo review of the station areas and transit centres within them in conjunction with planning around transit service expansion, including new LRT, BRT and rapid routes.

Exhibit 6.4: Proposed Mobility Hubs – Edmonton Mass Transit Study



6.3. Next Steps

This report documents the ultimate mass transit network and a proposed interim network for a 1.25 Million population horizon. The next technical step is to integrate these findings with the other aspects of the **Mobility Network Assessment** to define transportation project priorities across multiple modes. These will be guided by community needs and opportunities, as well as the logistics of implementing infrastructure and services.

Another branch of technical analysis will be to assess the **operational feasibility** of elements of the mass transit network, to evaluate if and how they could be implemented. The increases in service frequency and new types of service point to several challenges that will need to be addressed through future study. These include:

- Increasing the capacity of certain parts of the LRT network to interline the Capital and Metro Lines at higher frequencies, and finding the best way to address the capacity constraint at University Avenue;
- Operating frequent and rapid buses at high frequencies, typically in mixed traffic and with constraints on 'platform' space in the public right of way. This will need to consider transit priority measures and curb management;

This type of work is usually collaborative and would draw upon the local knowledge base for the transit system, bring in lessons learned from applicable case studies, and evaluate potential solutions, potentially through modelling simulation.

Design Guidelines and Standards for the new and evolving types of transit service will need to be developed to inform planning and design of future services. This may take several forms but typically starts with confirming the 'function and feel' of transit infrastructure and services, with technical and stakeholder input informing this. Design standards can then be developed by merging best practice from existing standards, with emerging urban design principles, and the guidelines developed for transit infrastructure, vehicles and operations. It will also be important to align these guidelines and standards to City Policy (both short term and long term) and in particular land use development policy to ensure the integration with land use policies.

Bus Rapid Transit (with fully-segregated or dedicated lanes) types of service would be "new" to Edmonton and some elements would warrant development of guidelines and standards to support and inform future project development. This would also be applicable to mobility hubs and large-scale mass transit stations not designed specifically for rail technology.

Early Implementation can take several forms. The Bus Network Redesign is already approved and many of the early versions of future routes included in the mass transit network will be in service in the city before the end of 2021.

The rapid bus and semi-exclusive services, including the look and application of Bus Rapid Transit (BRT), bus only or HOV lanes (painted and segregated) and transit priority measures, will be new to Edmontonians. Therefore, purposeful and coordinated efforts to define these concepts in the Edmonton setting will be critical for the success of implementing the mass transit network. It is common in the industry to select a priority corridor, work with stakeholders to develop, design and implement 'quick wins' improvements (for example, confirming and implementing bus stop locations for a rapid bus service) and deploying a demonstration/pilot version of the service.

Appendix A – Additional Mass Transit Reference Exhibits

Categories of Mass Transit Modes

Nodes and Corridors Reference Maps

Volume Plots for AM Peak – Options A and B

Additional Model Outputs (Transit Volumes)

Categories of Mass Transit Modes

In addition to building on the future base network, the mass transit network provides as opportunity to bring together and categorize different mass transit modes. Exhibit A.1 outlines the types of services that are included in the mass transit network, and explains their role or the primary market that they cater too as well as some examples of each type of service. Most of the services can be provided by more than one technology option (primarily rail and bus variations).

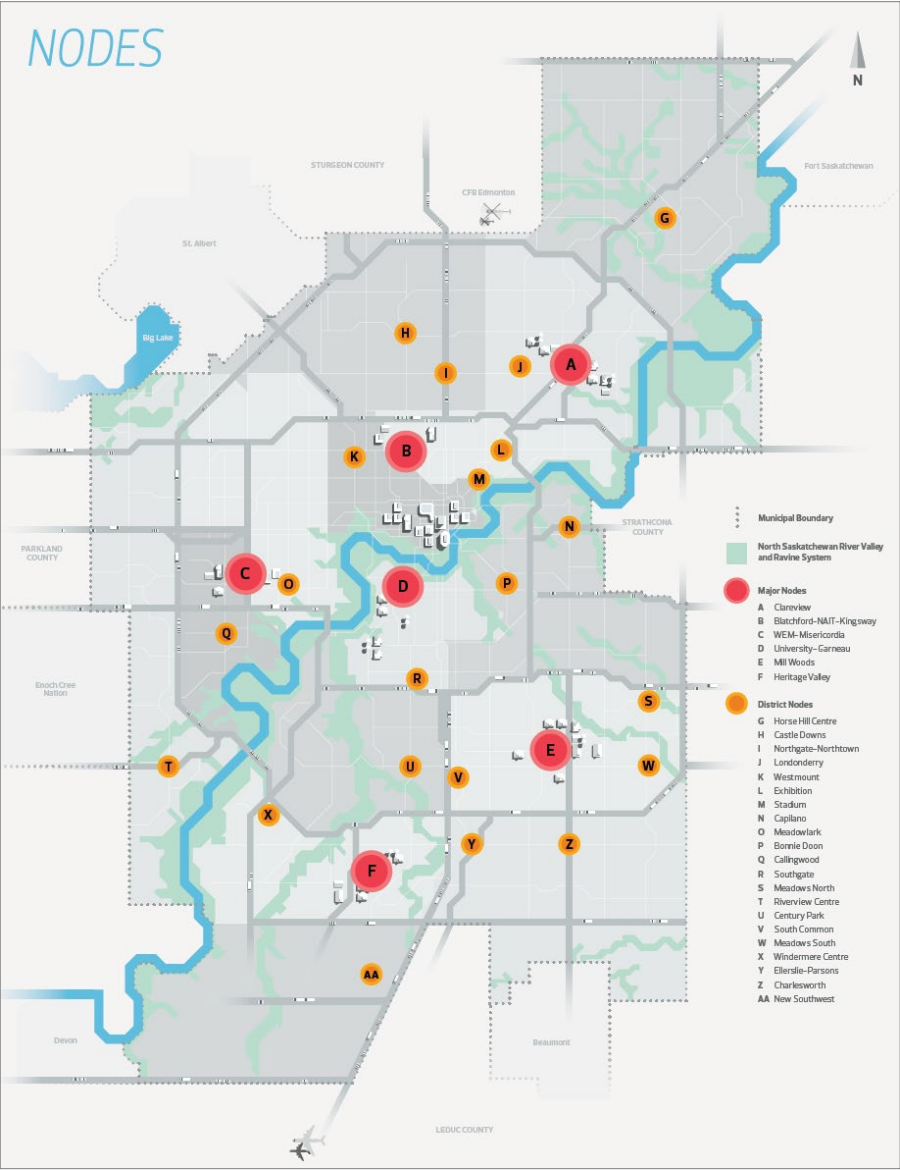
The exhibit also identifies:

- The range of typical operations usually seen with the different modes of transit operation for the regional, rapid and urban forms of mass transit. These are expressed in terms of stop spacing and frequency;
- The lengths of typical trips supported by the different forms of mass transit;
- The typical densities served and connected by the different forms of transit. This provides some guidance as to where the different forms of transit would usually find success in attracting enough passengers;
- Typical benefits and challenges associated with implementation and operation of each type of service. These are based on general practice in North America.

Exhibit A.1: Mass Transit Modes, Technology Examples and Service Characteristics

Mode	Primary Trip Markets	Technology Examples	Typical Services	Trip Length (km)	Density (people + jobs/ha)	Benefits	Challenges
Regional Transit (Link Cities Together)							
All Day	<ul style="list-style-type: none"> Long commuter trips Long off-peak discretionary trips 	<ul style="list-style-type: none"> Passenger train Highway coach (Bus) 	<ul style="list-style-type: none"> Peak headway, 5 to 15 minutes 800 m to 4 km spacing 	>15	Varies by context	<ul style="list-style-type: none"> Competitive with auto for long trips Better mitigates peak hour congestion 	<ul style="list-style-type: none"> ROW can be costly given long distances Costly station parking & road improvements
Peak Only	<ul style="list-style-type: none"> Long commuter trips 	<ul style="list-style-type: none"> As above, but only commuter services 	<ul style="list-style-type: none"> Peak headway, 10 to 20 minutes 800 m to 4 km spacing 	>15	Varies	<ul style="list-style-type: none"> Better mitigates peak hour congestion Restricted service times lowers operating costs 	<ul style="list-style-type: none"> Does not serve non-work based trips well Costly station parking & road improvements
Rapid Transit (Support Cross-City Travel and Higher Density Development)							
Exclusive ROW	<ul style="list-style-type: none"> Long and intermediate distance trips, all times of day 	<ul style="list-style-type: none"> Subway Automated Train or Bus LRT or BRT in tunnel, trench or on structure Signal Pre-emption or Priority System at intersections 	<ul style="list-style-type: none"> Peak headway, 3 to 6 minutes 400 m to 2 km spacing 	5-15	>200	<ul style="list-style-type: none"> Very high capacity Can encourage densification 	<ul style="list-style-type: none"> High capital costs Space requirements
Semi-Exclusive ROW	<ul style="list-style-type: none"> Long and intermediate distance trips, all times of day 	<ul style="list-style-type: none"> LRT or BRT in exclusive path, but with intersections Integrated Transit Priority Measures (queue jumping, dedicated lanes, etc.) 	<ul style="list-style-type: none"> Peak headway, 3 to 10 minutes 400-800 m stop spacing 	5-15	100-200	<ul style="list-style-type: none"> High capacity at lower costs than exclusive ROW Can encourage densification 	<ul style="list-style-type: none"> Less reliable and potentially slower than exclusive ROW Space requirements
Limited Stop	<ul style="list-style-type: none"> Long and intermediate distance commuter trips 	<ul style="list-style-type: none"> Limited stop 'rapid' bus in bus lanes and mixed traffic Optional Transit Priority Measures (queue jumping, dedicated lanes, etc.) 	<ul style="list-style-type: none"> Peak headway, 5 to 12 minutes 400-800 m stop spacing. 	5-15	50-100	<ul style="list-style-type: none"> Reduced travel times attracts new riders Low cost, flexible route designs 	<ul style="list-style-type: none"> Reliability concerns due to mixed traffic Less impact on densification
Urban Mass Transit– (Convenient Access to Local Destinations)							
Frequent	<ul style="list-style-type: none"> Long and intermediate distance commuter Off-peak discretionary trips in major nodes and corridors 	<ul style="list-style-type: none"> Bus or streetcar/ tram in frequent/primary transit network 	<ul style="list-style-type: none"> Peak headway, 5 to 10 minutes Spacing same as currently done, 100-200m. 	<10	50-100	<ul style="list-style-type: none"> Extend reach of rapid services 	<ul style="list-style-type: none"> Operating costs need to be justified by demand Need many intersecting routes to work well

Exhibit A.2– Reference Maps – City Plan Nodes and Corridors



Source: City of Edmonton

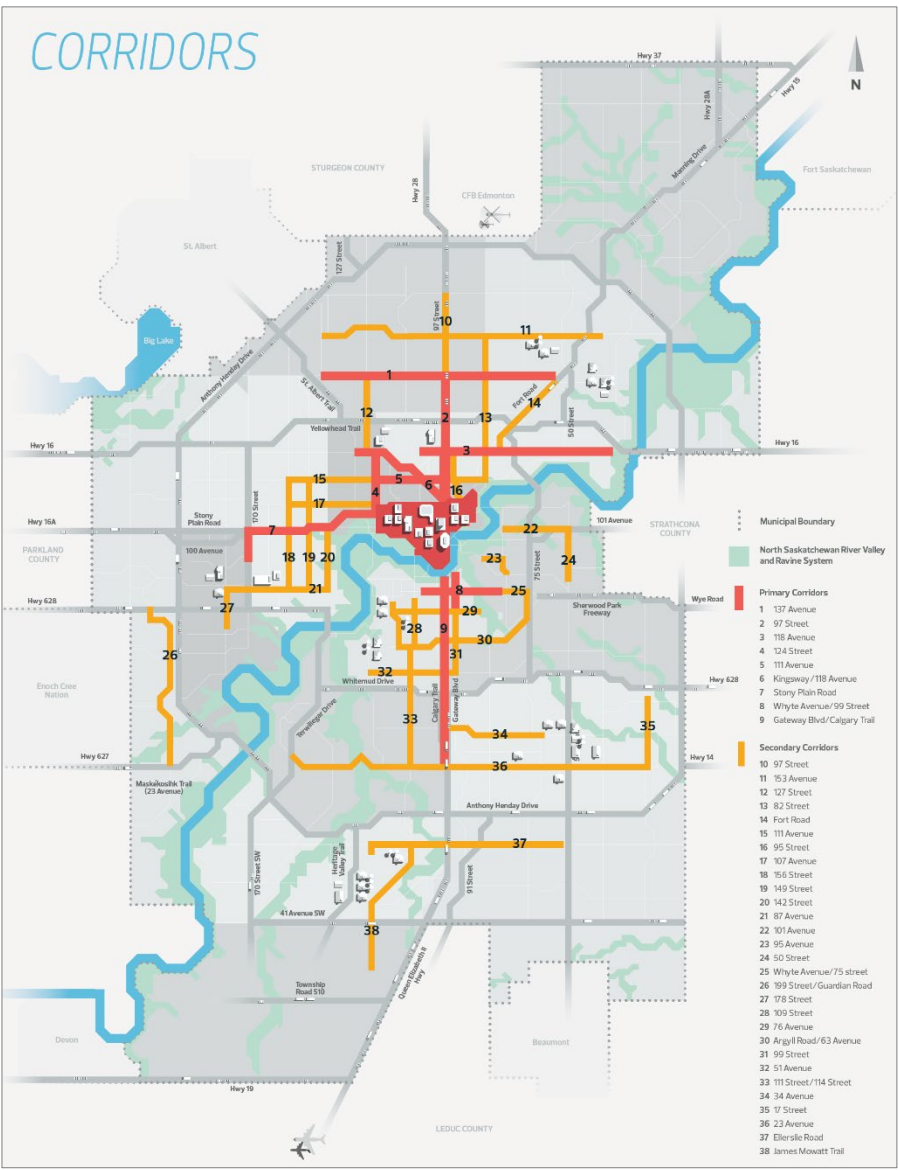


Exhibit A.3 – Combined Population and Employment Distribution at 1.25 Million Horizon

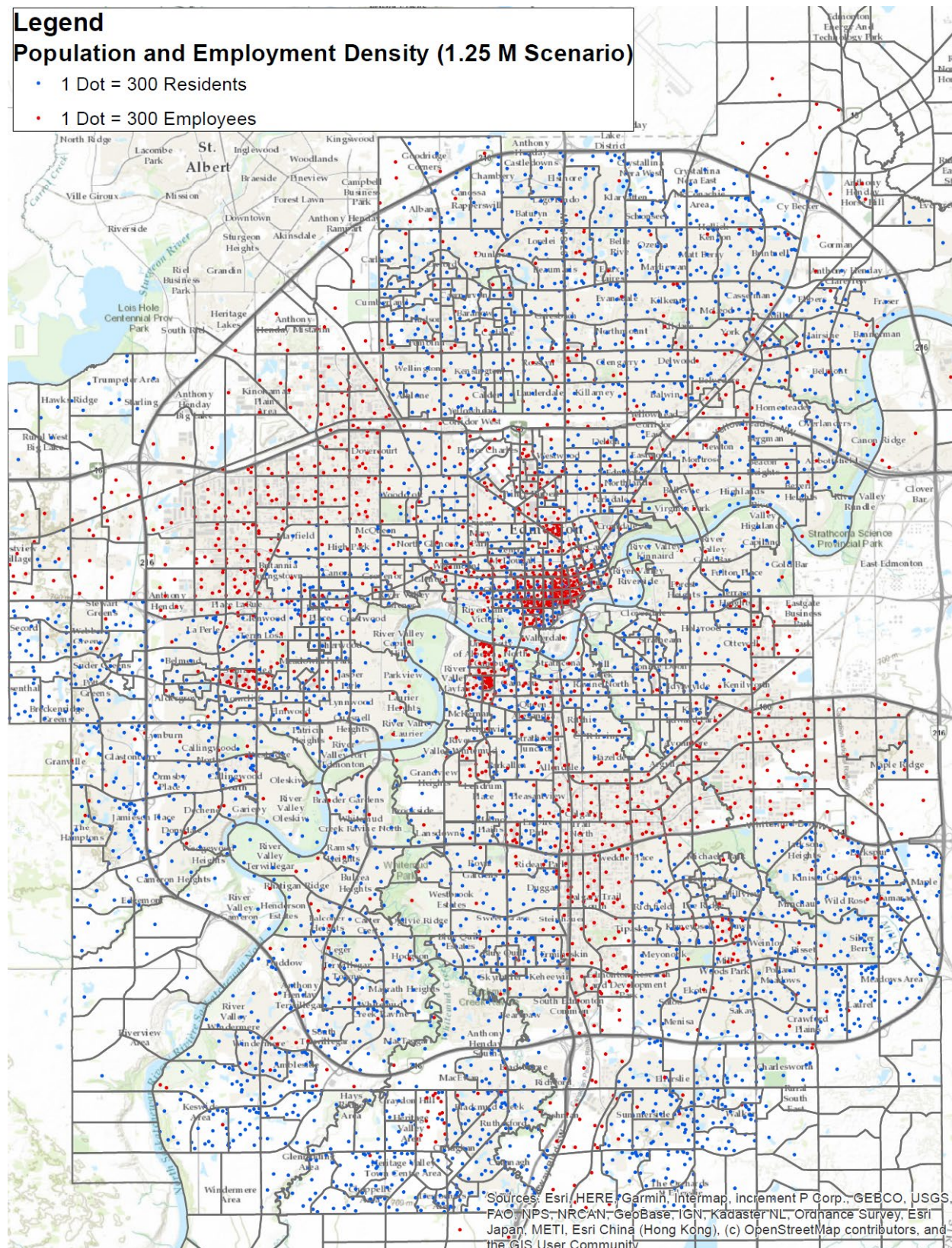
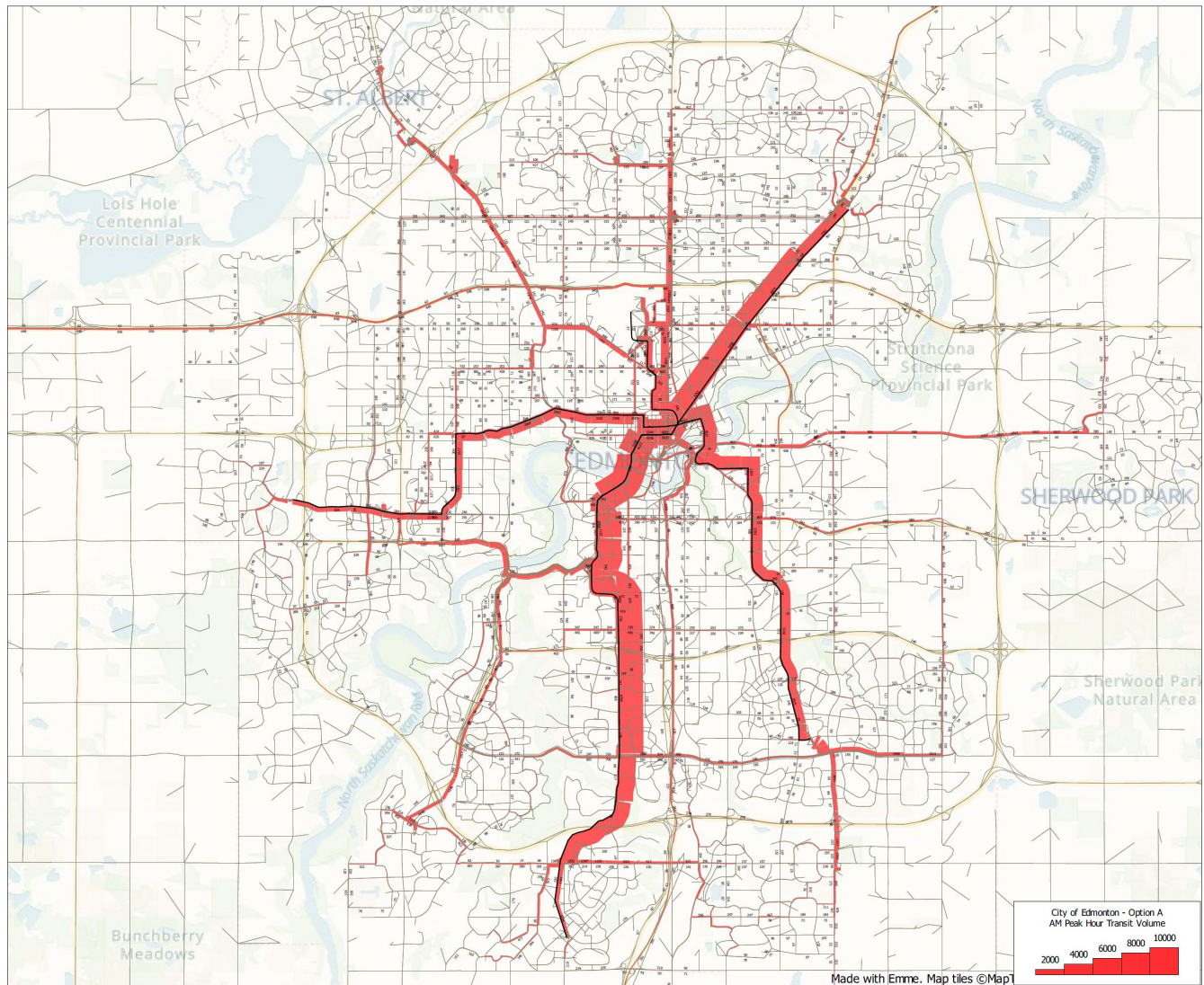
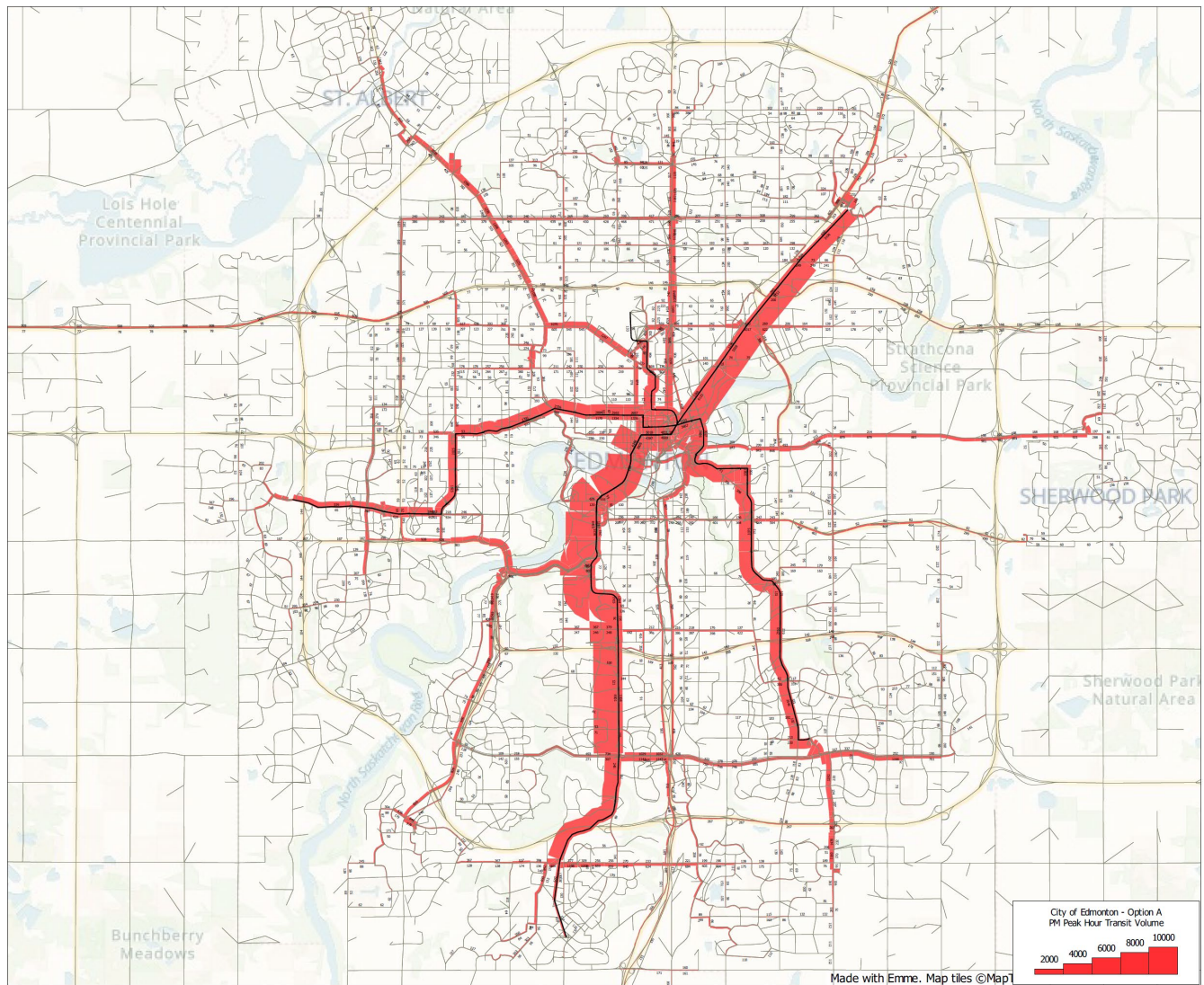


Exhibit A.4 – AM Peak Transit Assignment Result – Option A



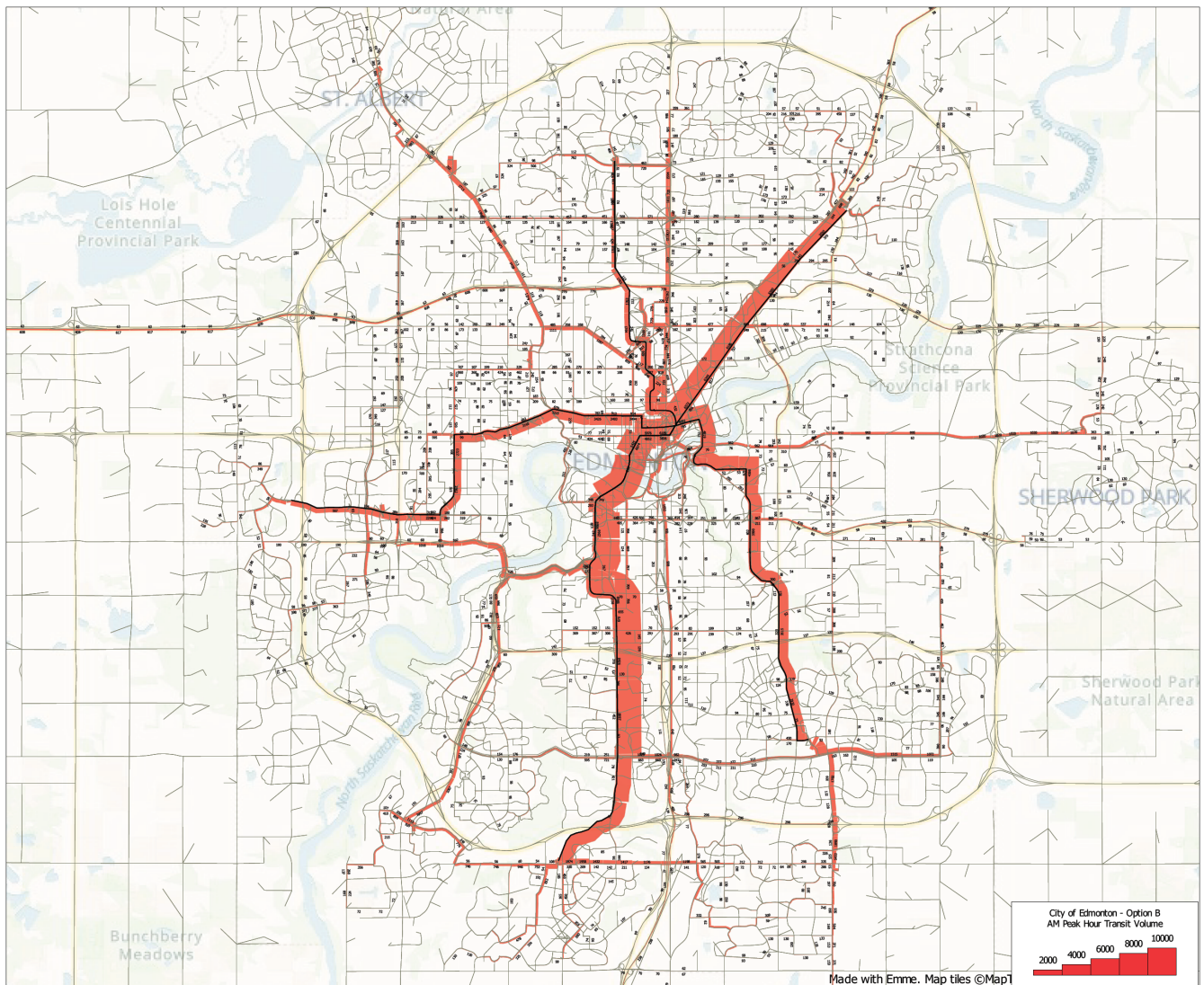
Source: IBI Group/City of Edmonton. EMME Transit Volume Plot.

Exhibit A.5 – PM Peak Transit Assignment Result – Option A



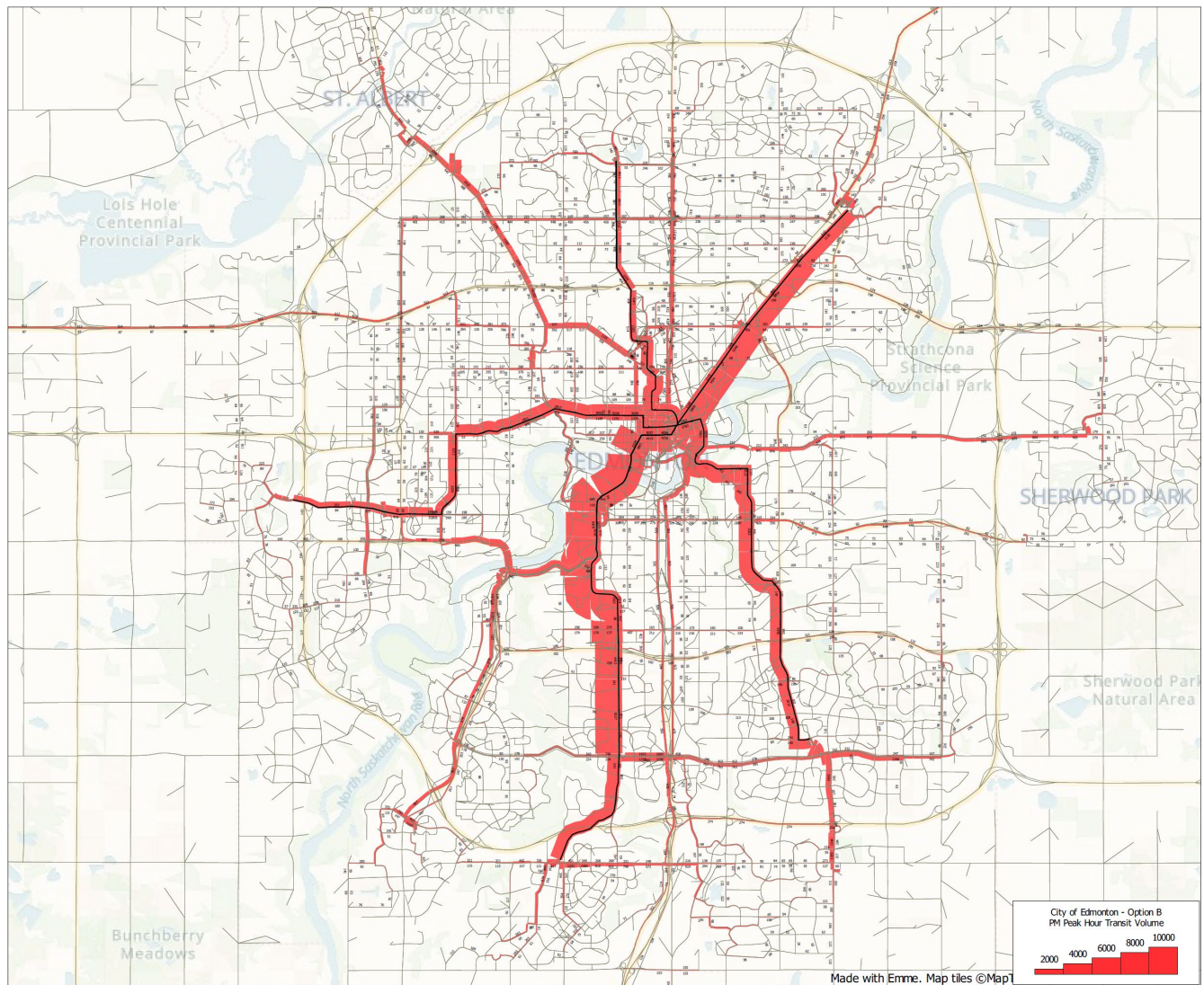
Source: IBI Group/City of Edmonton. EMME Transit Volume Plot.

Exhibit A.6 – AM Peak Transit Assignment Result – Option B



Source: IBI Group/City of Edmonton. EMME Transit Volume Plot

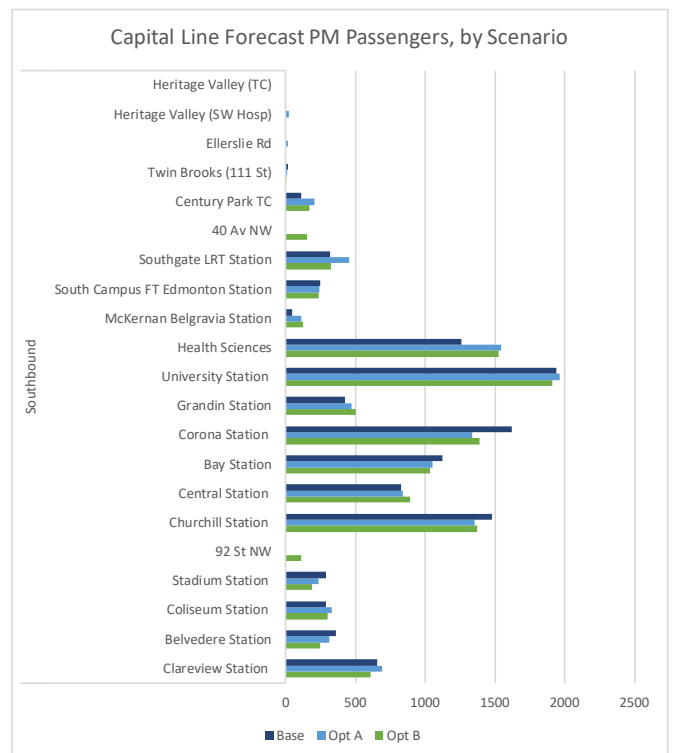
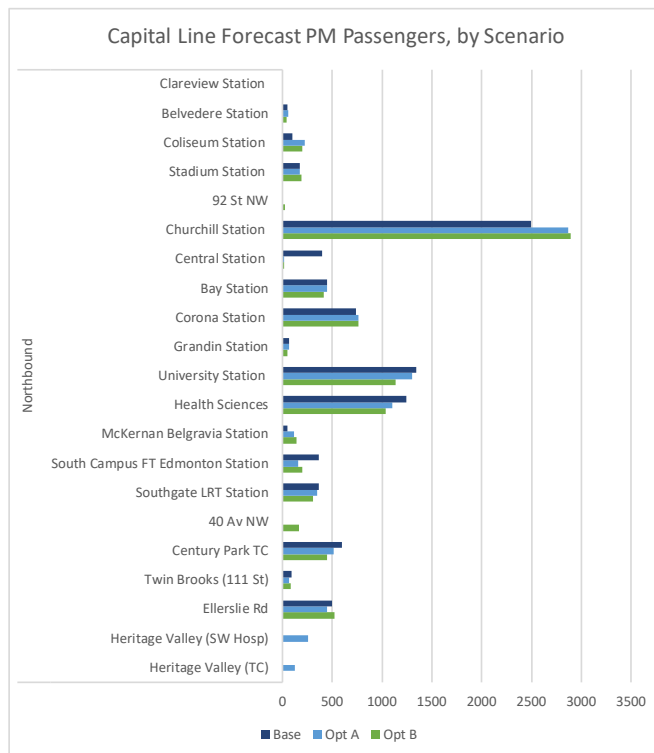
Exhibit A.7 – PM Peak Transit Assignment Result – Option B



Source: City of Edmonton. EMME Transit Passenger Demand - Volume Plot.

Exhibit A.8– Light Rail Transit Boarding Activity, by Scenario

			Capital Line		Metro Line		Valley Line	
	Peak	Direction	Board	Alight	Board	Alight	Board	Alight
Comparing Options								
PM	Base	2-way	20,014	20,015	4,680	4,679	13,130	13,130
	Opt A	2-way	20,216	20,220	4,869	4,867	12,507	12,507
	Opt B	2-way	20,216	20,220	6,510	6,511	12,563	12,562
Option A	PM Peak	North	9,038	9,040	1,731	1,730		
		South	11,178	11,180	3,138	3,137		
		East					6,703	6,704
		West					5,804	5,803
		Total	20,216	20,220	4,869	4,867	12,507	12,507
	AM Peak	North	11,327	11,326	3,836	3,836		
		South	9,988	9,986	1,539	1,538		
		East					5,487	5,487
		West					6,493	6,493
		Total	21,315	21,312	5,375	5,374	11,980	11,980



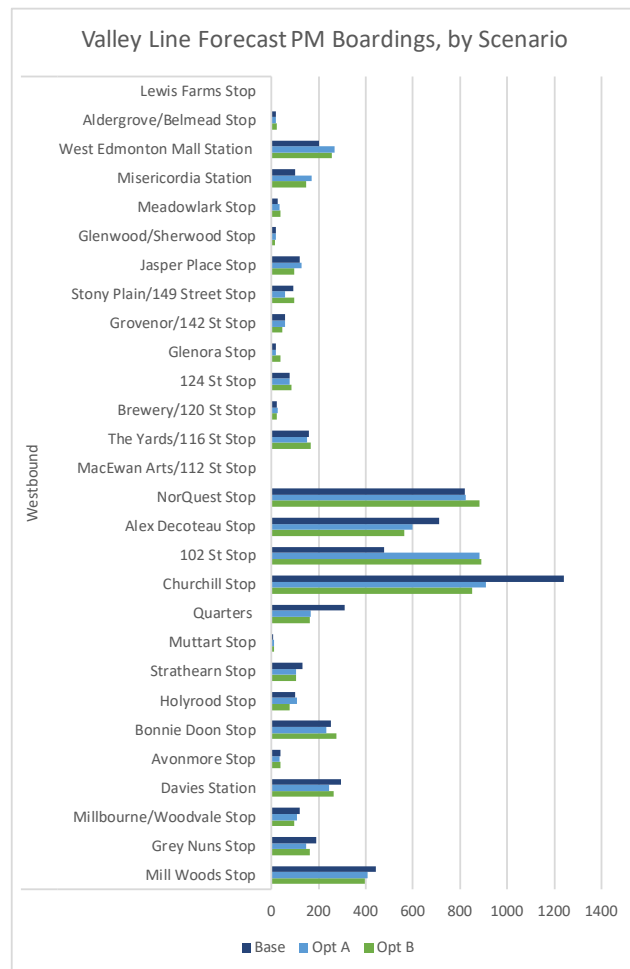
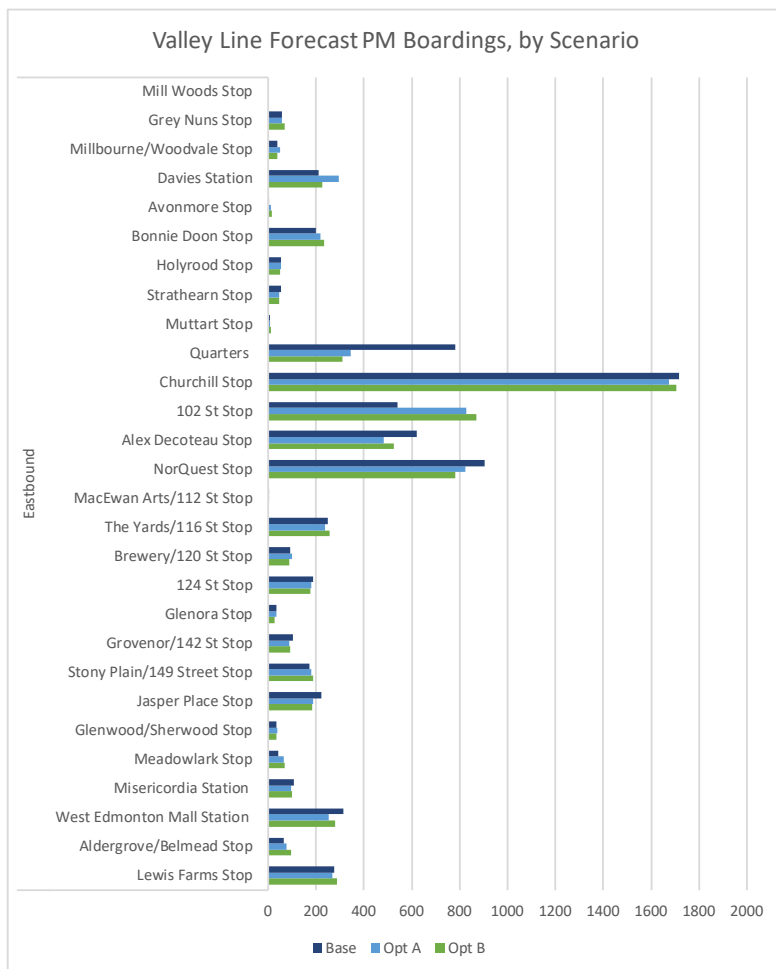
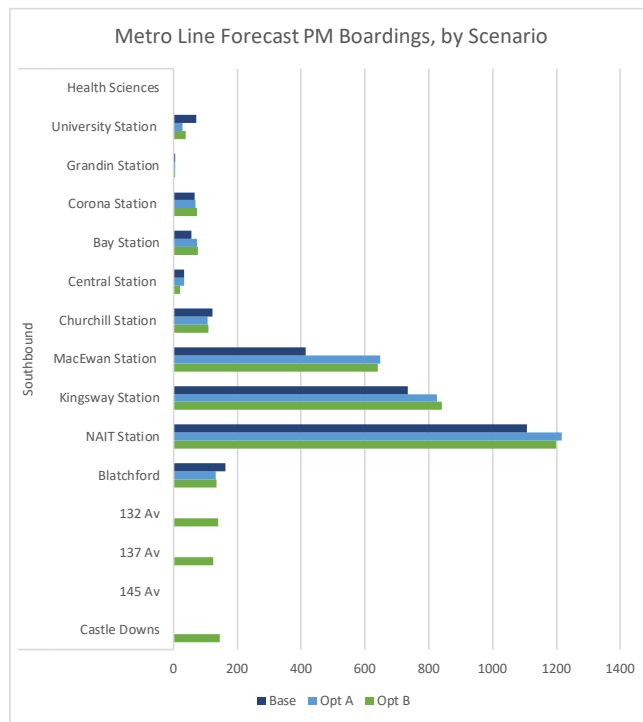
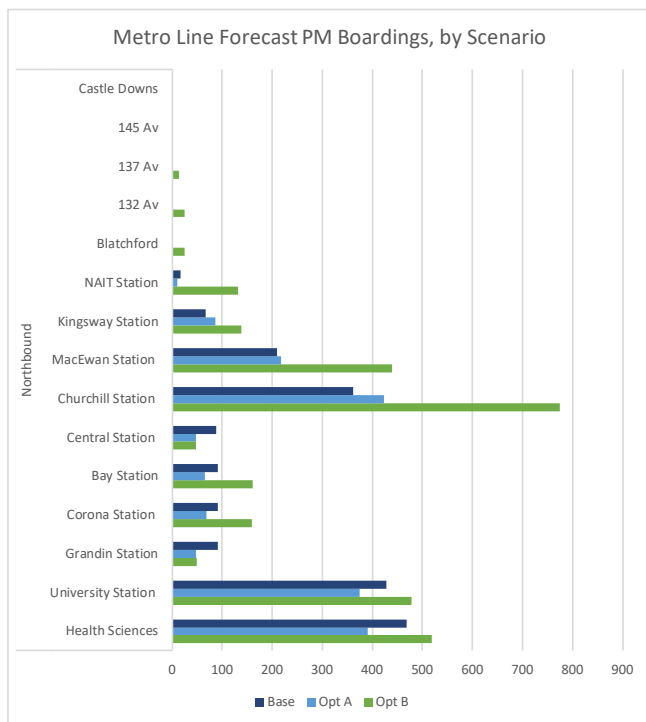
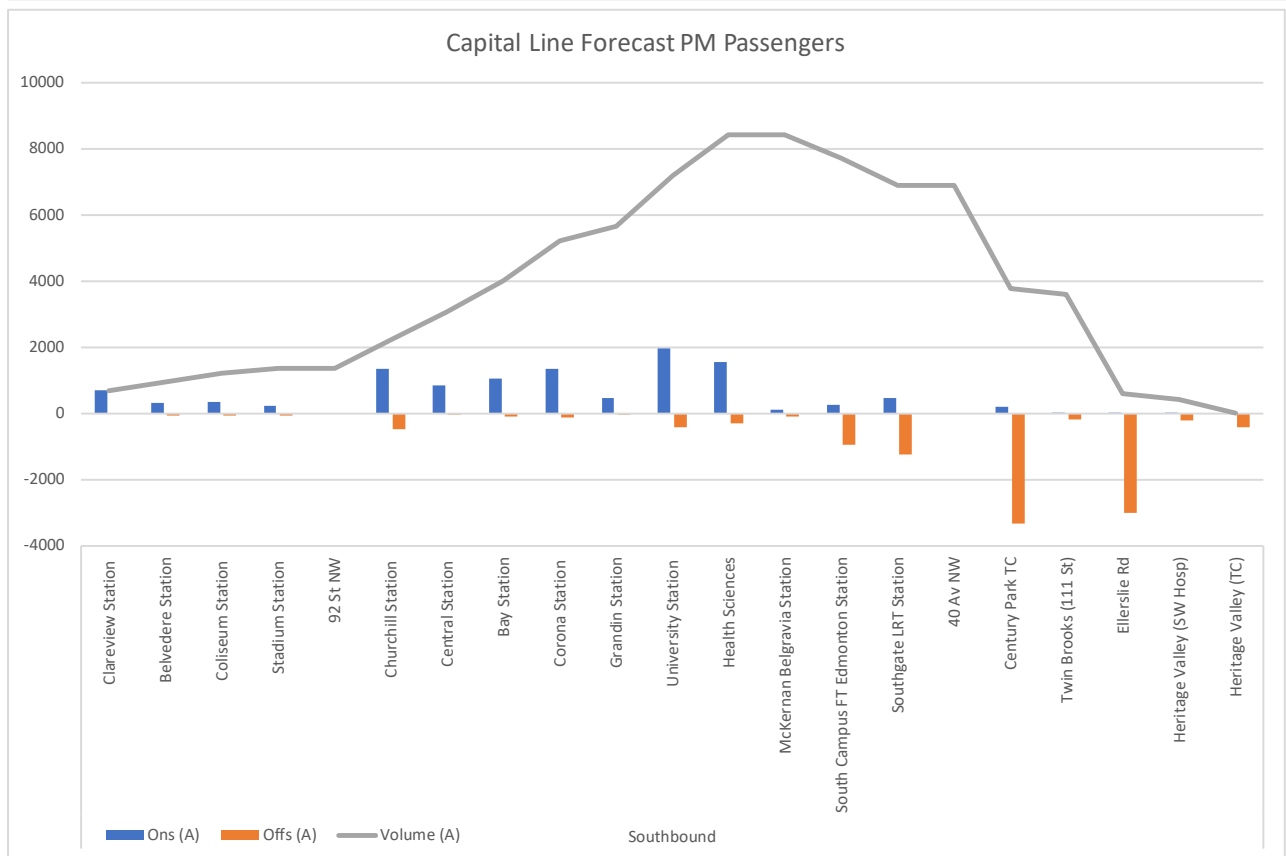
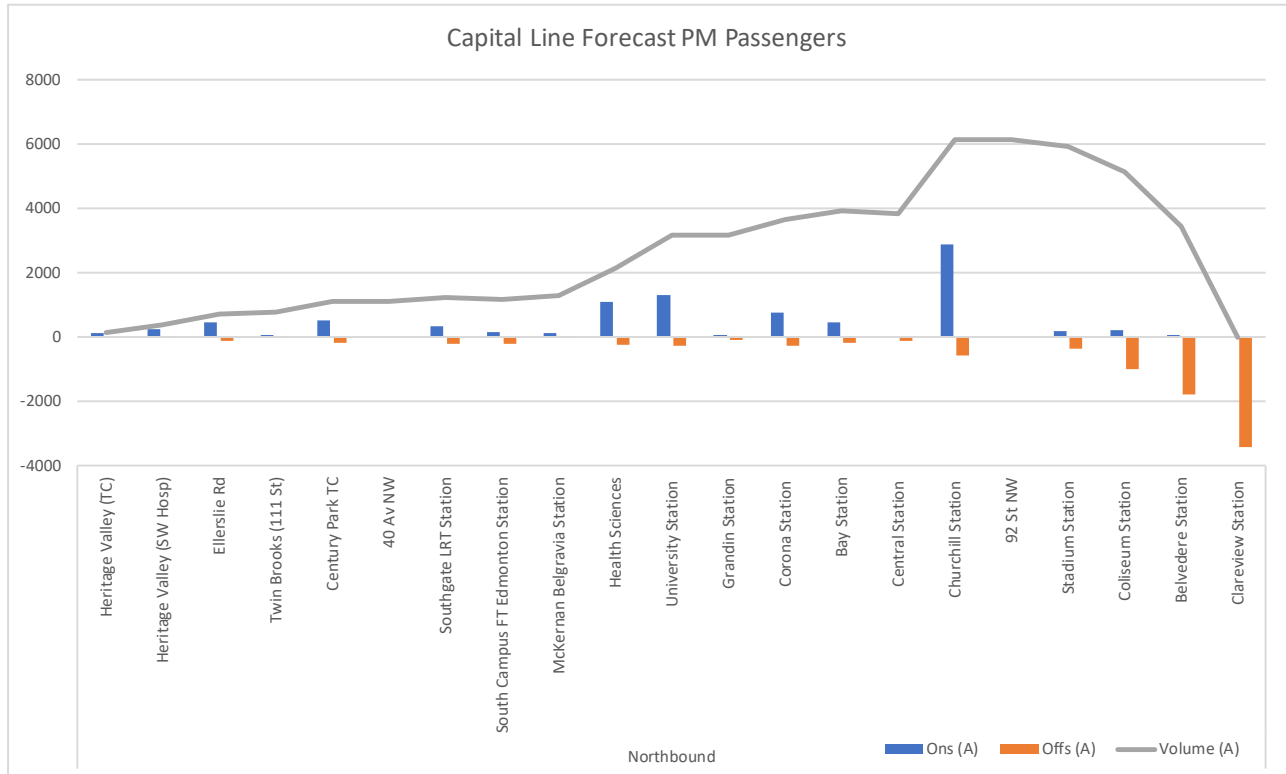
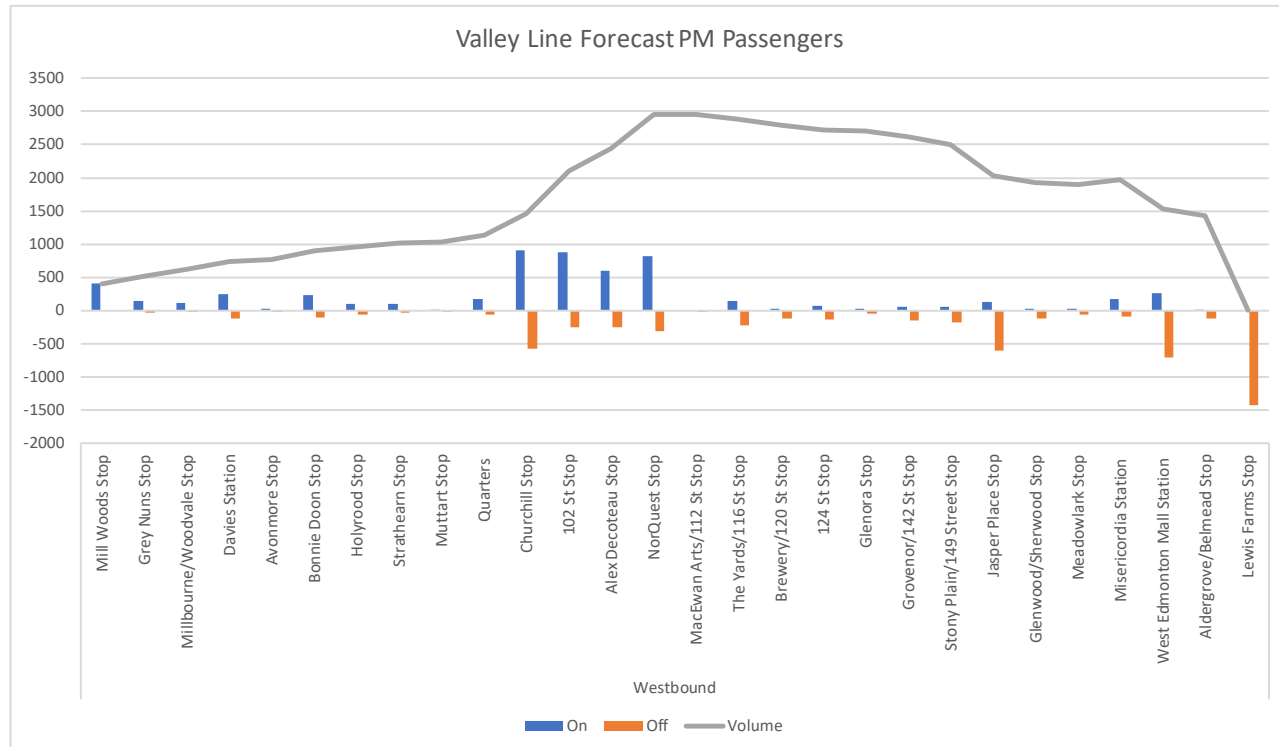
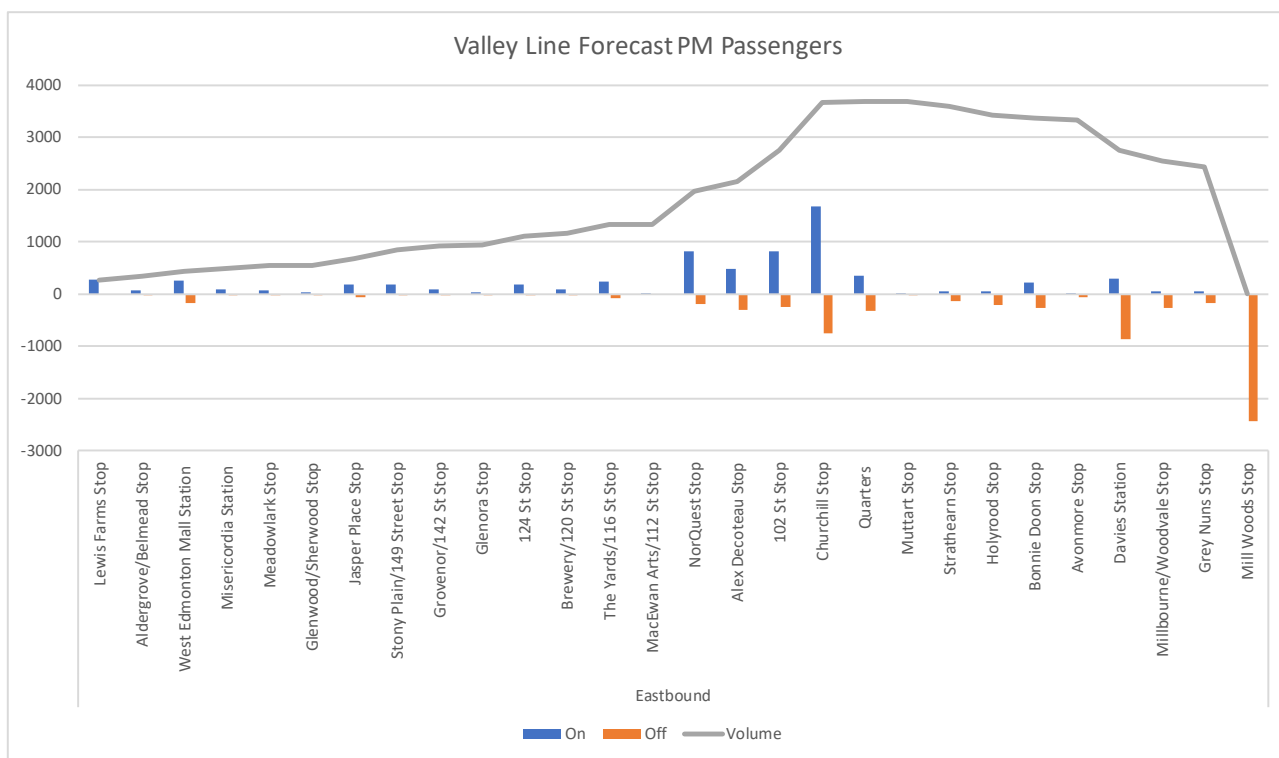


Exhibit A.9– Light Rail Transit Passenger Profiles (PM Peak)





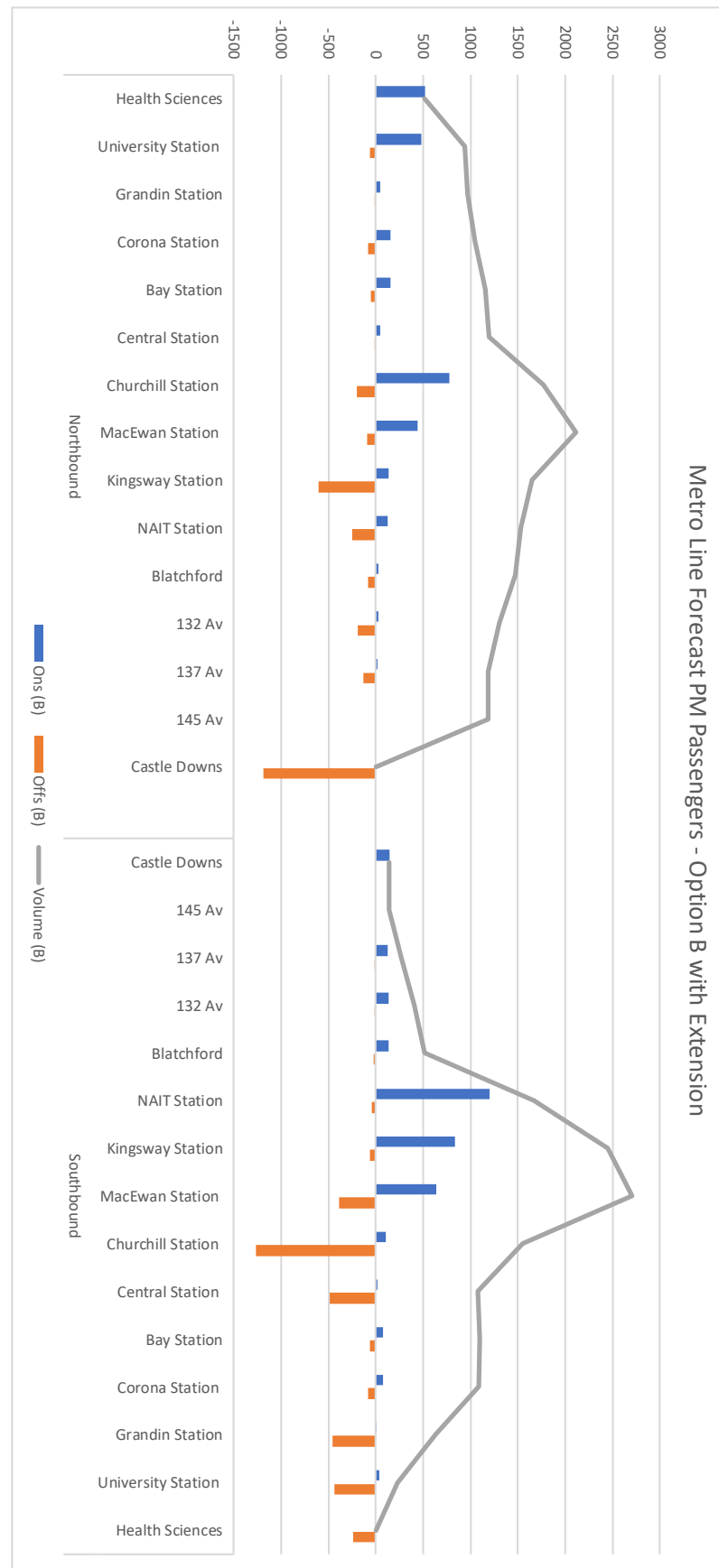


Exhibit A.10 – Bus Passenger Activity – 97 Street North of 118 Avenue

Peak	Direction	Location	B1/B1a		110X		9		Total	
			Board	Alight	Board	Alight	Board	Alight	Board	Alight
PM Peak	NB	97 Street & 118 Avenue	42	43	9	17	16	23	67	83
PM Peak	NB	97 Street & 127 Avenue/128 Ave	43	45			1	71	44	116
PM Peak	NB	97 Street & 132 Avenue	37	36	1	9	1	4	39	49
PM Peak	NB	97 Street & 137 Avenue/Northgate	98	113	54	139	62	73	214	325
PM Peak	NB	97 Street & 153 Avenue	100	536				18	100	554
PM Peak	NB	Eaux Claires TC			8	457	10	279	18	736
PM Peak	NB	Castle Downs Road & 153 Avenue	46	134					46	134
PM Peak	NB	Castle Downs Transit Centre	38	372					38	372
		NB PM Total	404	1279	72	622	90	468	566	2369
PM Peak	SB	Castle Downs Transit Centre	96	36					96	36
PM Peak	SB	Castle Downs Road & 153 Avenue	72	7					72	7
PM Peak	SB	Eaux Claires TC			105		174		279	0
PM Peak	SB	97 Street & 153 Avenue	18	37					18	37
PM Peak	SB	97 Street & 137 Avenue/Northgate	7	29	57	31	114	38	178	98
PM Peak	SB	97 Street & 132 Avenue	8	2	2	1	4	1	14	4
PM Peak	SB	97 Street & 127 Avenue/128 Ave	54	6			13	6	67	12
PM Peak	SB	97 Street & 118 Avenue	18	2	0	6	6	8	24	16
		SB PM Total	273	119	164	38	311	53	748	210

B1 operates from Campbell Rd to Century Park

110X operates Eaux Claires to Government Centre; ETS #9 operates Eaux Claires to Southgate

Exhibit A.11– Bus Passenger Activity – Whyte Avenue Corridor/U of Alberta area

Major Services on Whyte/82 Avenue - as modelled			B2		4		8		3-Route Total			
Peak	Direction	Location	Board	Alight	Board	Alight	Board	Alight	Board	Alight		
PM Peak	EB	Fort Edmonton Park Road & Fox Drive		0	-	-			0	0		
	EB	Belgravia Road & Fox Drive	28	1	-	1			28	2		
	EB	116 Street & Belgravia Road			-	4			0	4		
	EB	116 Street & 68 Avenue			-	-			0	0		
	EB	South Campus Ft Edmonton Station			47	72			47	72		
	EB	113 Street& 65 Avenue			2	43			2	43		
	EB	114 Street & 71/72 Ave	3	3	-	1			3	4		
	EB	114 Street & 76 Avenue	-	54	0	3			0	57		
	EB	114 Street & 82 Avenue/University Dr	0	1	1	0			1	1		
	EB	114 Street & 83 Avenue			0	28			0	28		
	EB	114 Street & 85 Avenue			-	33			0	33		
	EB	University Station			252	6			167	-	419	6
	EB	112 Street & 87 Avenue			0	31			0	17	0	48
	EB	112 Street & 84 Avenue			0	17			-	13	0	30
	EB	112 Street & 82 Avenue/Whyte Ave	129	10	0	1			0	4	129	15
	EB	109 Street & 82 Avenue/Whyte Ave	20	25	-	34			1	26	21	85
	EB	106 Street & 82 Avenue/Whyte Ave			10	46			6	34	16	80
	EB	104 Street & 82 Avenue/Whyte Ave	85	146	2	10			2	7	89	163
PM Peak	EB Total		265	240	315	330			176	101	756	671
PM Peak	WB	104 Street & 82 Avenue/Whyte Ave	33	2	13	6	8	4	54	12		
	WB	106 Street & 82 Avenue/Whyte Ave			15	17	9	9	24	26		
	WB	109 Street & 82 Avenue/Whyte Ave	17	8	8	3	4	2	29	13		
	WB	111 Street & 82 Avenue/Whyte Ave		12	-	11	-	6	0	29		
	WB	112 Street & 82 Avenue/Whyte Ave			-	22	-	5	0	27		
	WB	112 Street & 84 Avenue			-	30			0	30		
	WB	112 Street & 87 Avenue			-	44			0	44		
	WB	University Station			133	10	-	5	133	15		
	WB	114 Street & 85 Avenue			-	10	-	13	0	23		
	WB	114 Street & 83 Avenue			1	0			1	0		
	WB	114 Street & 82 Avenue/University Dr	-	1	-	-			0	1		
	WB	114 Street & 76 Avenue	3	21	-	0			3	21		
	WB	114 Street & 71/72 Ave		1	-	-			0	1		
	WB	113 Street & 65 Avenue			4	8			4	8		
	WB	113 Street & 65 Avenue			2	26			2	26		
	WB	South Campus Ft Edmonton Station			100	9			100	9		
	WB	Belgravia Road & Fox Drive	67	2					67	2		
	WB	Fort Edmonton Park Road & Fox Drive	1	5	4	0			5	5		
PM Peak	WB Total		121	52	280	196	21	44	422	292		
EB	Subtotal - Fox Drive/114 Street/U of A		31	59	303	239	167	30	501	328		
	Subtotal - Whyte Avenue (82)		234	181	12	91	9	71	255	343		
									756	671		
WB	Subtotal - Whyte Avenue (82)		50	22	36	59	21	26	107	107		
	Subtotal - Fox Drive/114 Street/U of A		71	30	244	137	-	18	315	185		
									422	292		

B2 operates from West Edmonton Mall Station to Bonnie Doon Station

ETS #4 operates Lewis Farms to Capilano; ETS #8 operates University to Abbotsfield

Appendix B – Previous Mass Transit Study Reports

Mass Transit Backgrounder

https://www.edmonton.ca/city_government/documents/PDF/CityPlan_MassTransitBackgrounder.pdf

City Plan Mass Transit Scenario Analysis

https://www.edmonton.ca/city_government/documents/PDF/CityPlan-MassTransit_ScenarioAnalysis.pdf

Mass Transit Strategy

https://www.edmonton.ca/city_government/documents/PDF/CityPlan_Edmonton_Mass_Transit_Strategy.pdf

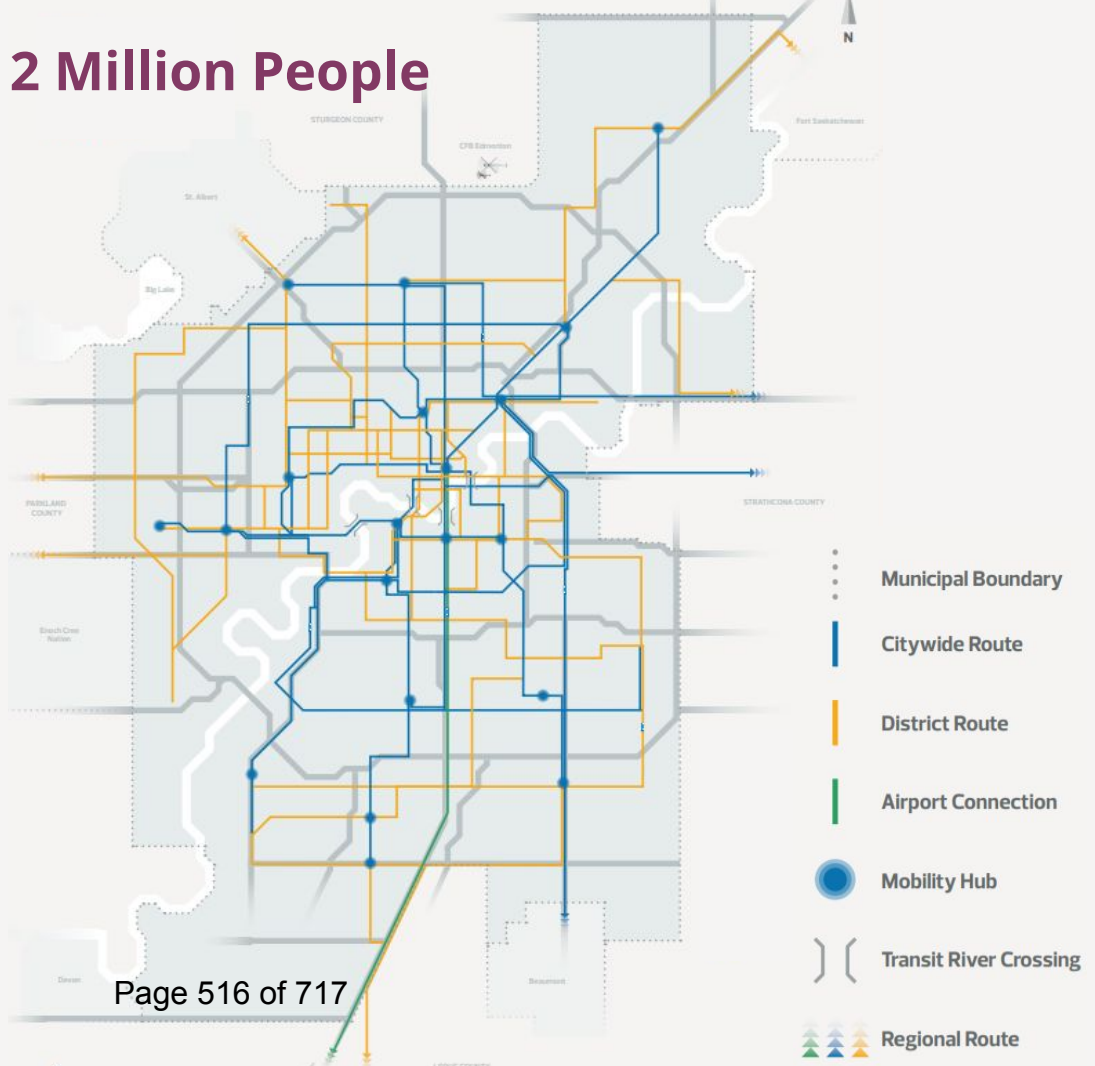


Mass Transit

Planning for 1.25 Million People

Urban Planning Committee
February 15, 2022
City Council
February 22, 2022

Mass Transit Network for 2 Million People



The City Plan Implementation Approach



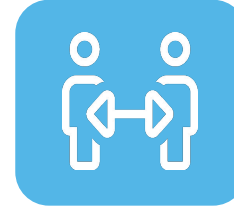
Planning, Policy & Regulation



Process & Service Delivery



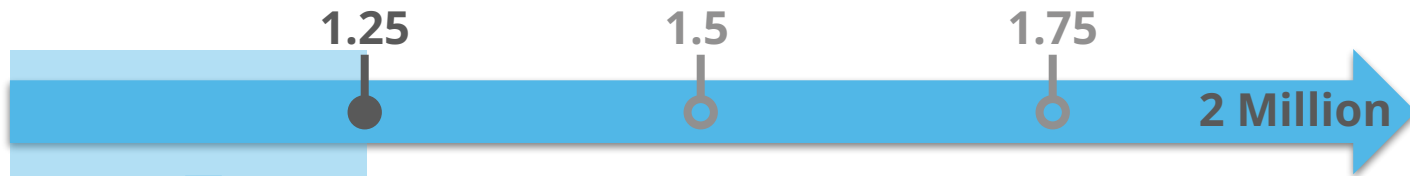
Data & Measurement



People, Partnerships & Change Management

Examples

- | | | | |
|---|--|---|--|
| <ul style="list-style-type: none">• District Planning | <ul style="list-style-type: none">• Prioritized budgeting | <ul style="list-style-type: none">• Measures and targets | <ul style="list-style-type: none">• Organizational change management |
| <ul style="list-style-type: none">• City Planning Framework | <ul style="list-style-type: none">• Business planning | <ul style="list-style-type: none">• Transparent reporting | <ul style="list-style-type: none">• External relationships and partnership |
| <ul style="list-style-type: none">• Zoning Bylaw Renewal | <ul style="list-style-type: none">• Operational service delivery | | |



Mass Transit Process for 1.25 Million People

Strategy

Implementation

Design

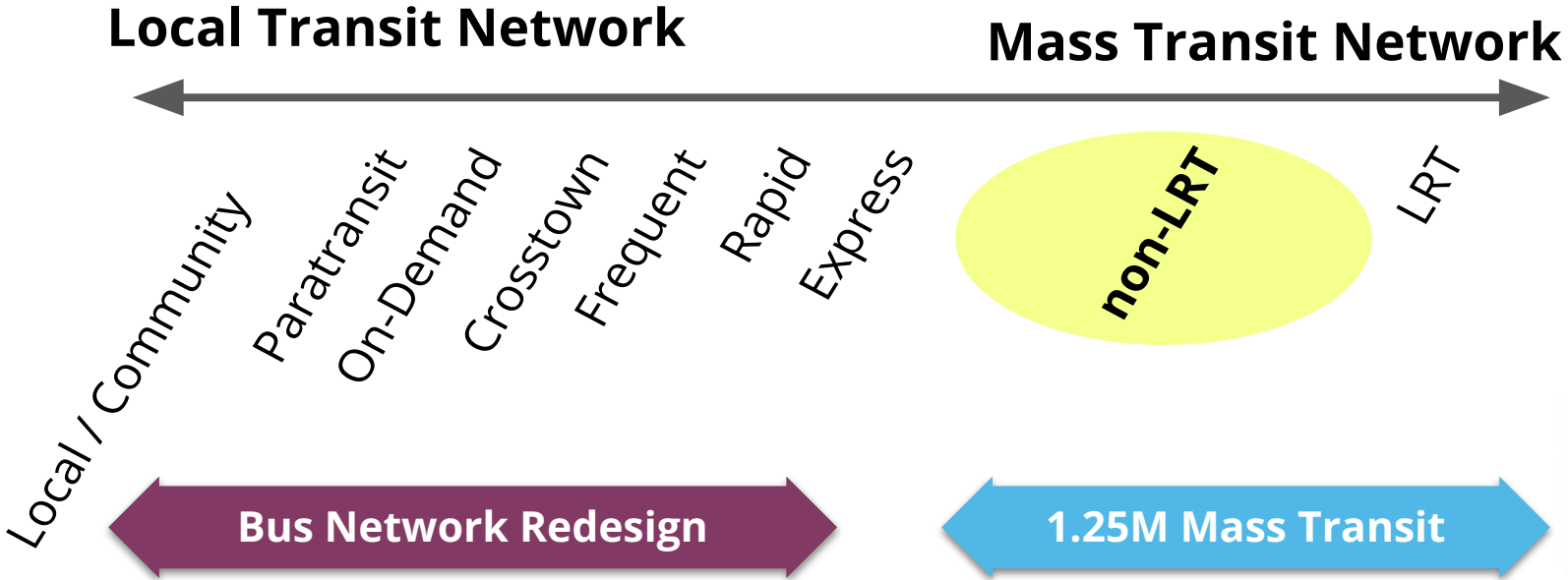
Construction

Operation

Present

Edmonton

Mass Transit in Edmonton



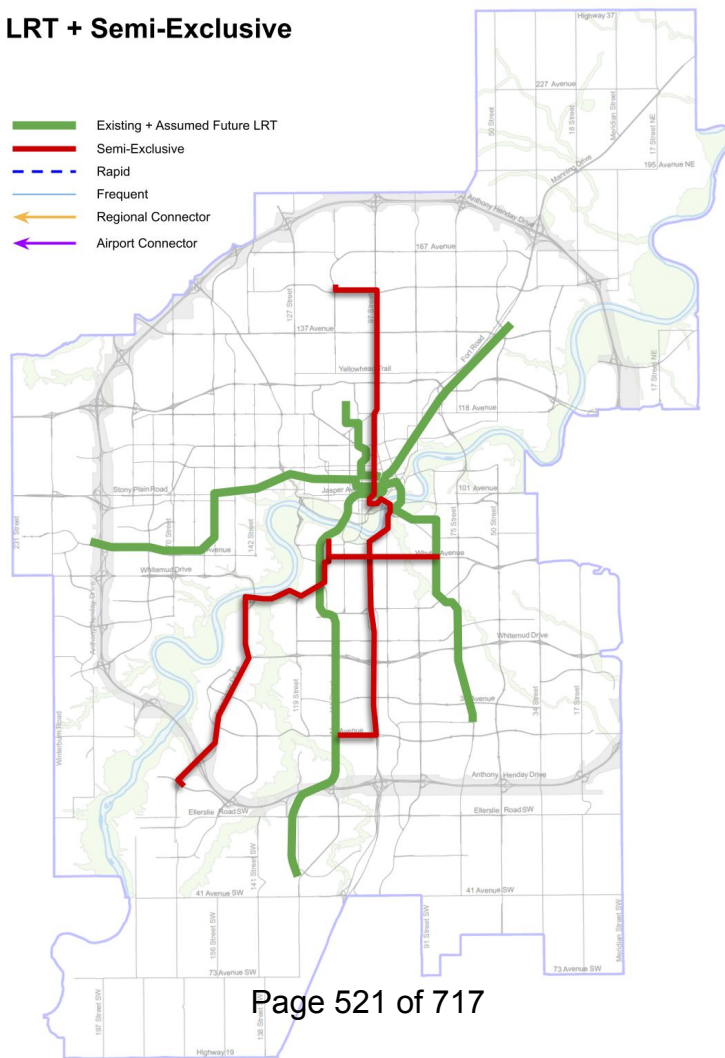
Mass Transit Success Factors for 1.25 Million



1. Mass Transit Priority
2. Future Development Opportunities
3. Filling in Network Gaps + Parallels
4. Parking Policy + Mobility Hubs

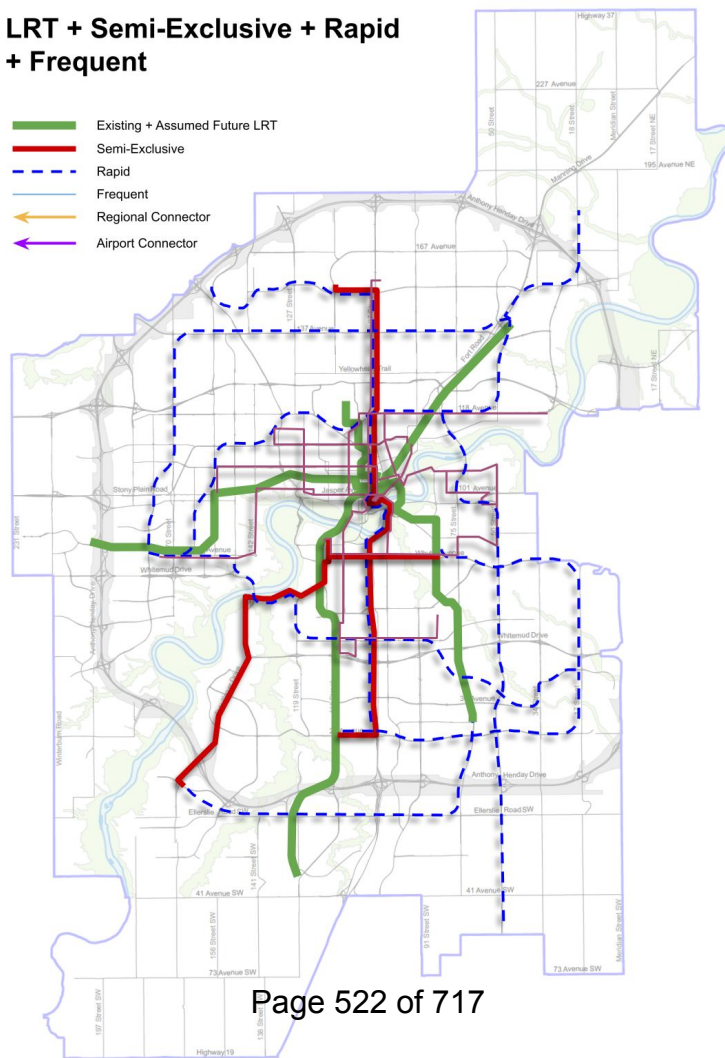
LRT + Semi-Exclusive

- Existing + Assumed Future LRT
- Semi-Exclusive
- Rapid
- Frequent
- Regional Connector
- Airport Connector

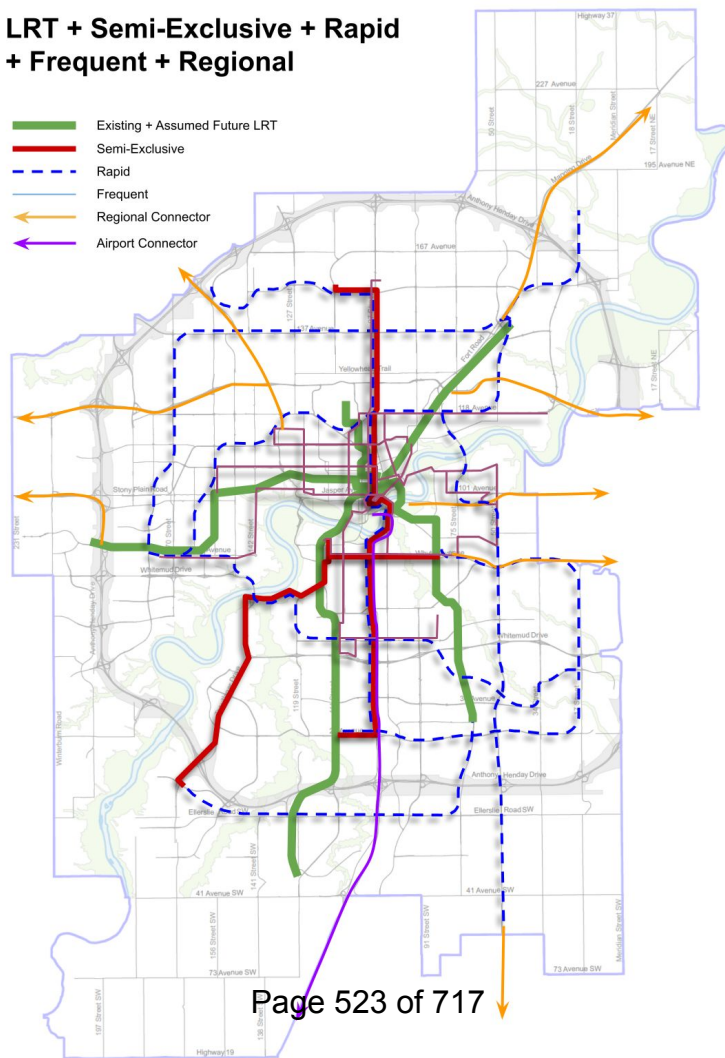


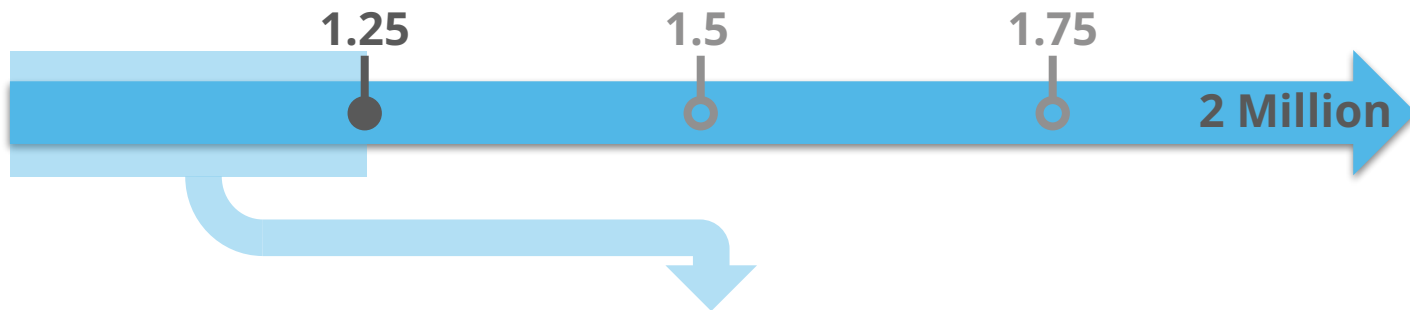
LRT + Semi-Exclusive + Rapid + Frequent

- Existing + Assumed Future LRT
- Semi-Exclusive
- - - Rapid
- Frequent
- ← Regional Connector
- ← Airport Connector

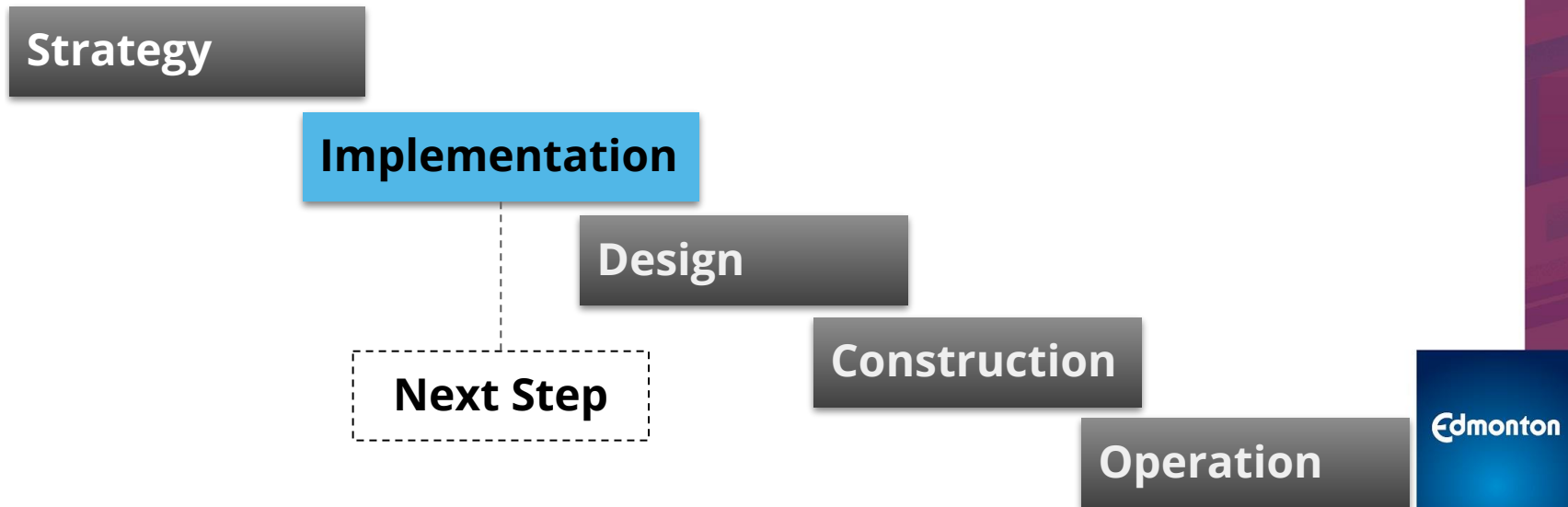


- Existing + Assumed Future LRT
- Semi-Exclusive
- Rapid
- Frequent
- Regional Connector
- Airport Connector





Mass Transit Process for 1.25 Million People



Questions & Discussion



URBAN PLANNING COMMITTEE REPORT
ETS Fleet Storage and Maintenance Facility Project

Recommendation of the Committee

That the strategy as outlined in Scenario 3 of Attachment 1 of the February 15, 2022, Integrated Infrastructure Services report IIS00416, be approved.

History

At the February 15, 2022, Urban Planning Committee meeting, the February 15, 2022, Integrated Infrastructure Services report IIS00426 was considered.

Attachment

February 15, 2022, Integrated Infrastructure Services report IIS00416

ETS Fleet Storage and Maintenance Facility Project

RECOMMENDATION

That Urban Planning Committee recommend to City Council:

That the strategy outlined in the February 15, 2022, Integrated Infrastructure Services report, IIS00416, be approved.

Report Purpose

Council decision required

Council is being asked to approve the strategy and next steps outlined in this report that supports the long term need to guide the renewal and development of existing and future Edmonton Transit Service fleet storage and maintenance facilities as a priority for alignment with The City Plan.

Executive Summary

- The Edmonton Transit Service Fleet Storage, Operations and Maintenance Facility Strategy ("the Strategy") is designed to guide the renewal and development of existing and future Edmonton Transit Service fleet storage and maintenance facilities to address the growth, capacity and electrification needs of the fleet through to 2040.
- Transitioning to a zero-emission transit fleet is a core objective of this work and currently calls for up to 440 electric buses to replace diesel buses by 2030.
- The Strategy recommends the construction of two new operations and maintenance garages in the southeast and northwest quadrants of the city, enabling a fully electrified bus fleet. The Strategy also recommends a progressive series of upgrades, renewals and expansion projects within existing facilities to accommodate growth, capacity and electrification.
- The success of this Strategy will ideally see facility development stay ahead of fleet growth, capacity and electrification requirements. New and upgraded facilities are needed to enable transit service growth related to bus service.
- The Strategy will help address corporate outcomes and future impact on our community, including support in delivering services to Edmontonians now and in the future.

ETS Fleet Storage and Maintenance Facility Project

- Approval of this strategy will launch the process toward a fully integrated approach that addresses the needs of the network of fleet storage, operations and maintenance facilities across the city. This will ensure a holistic approach that aligns the service, infrastructure, and deployment of assets to be located where and when they are needed most.

REPORT

Edmonton Transit Service (ETS) fleet storage, operations and maintenance facilities are operating at full capacity. In order to grow, respond to future increased service demands and achieve greenhouse gas emissions targets by 2030 and beyond, significant investment into the design and construction of new and expanded facilities will need to be considered.

The Strategy outlined in this report is foundational to contributing to the delivery of The City Plan and the four strategic goals of ConnectEdmonton. It is critical to support the growth of the Bus Network and implementation of the Mass Transit Network envisioned in The City Plan. The ETS fleet of buses will need to grow and transition from diesel to electric buses over the next 20 years to meet these objectives.

This integrated strategy considers all aspects and infrastructure needed for the storage, operations and maintenance of buses allowing ETS to be responsive to riders' needs. The Strategy includes being more efficient with City resources and identifying what is needed now and in the future. With the foundation of the transit network established, the Strategy supports future city and ridership growth.

The Strategy also supports building an environmentally sustainable transit service. It addresses growth requirements that align with the Energy Transition Strategy and City Operations Greenhouse Gas Management Plan by building the foundation to support a fully electric fleet in the future.

The current fleet occupies the total available storage within each garage and cannot grow or be electrified without expanding the storage and maintenance capacity. Electric bus maintenance and charging stations require different infrastructure than diesel buses, including significant electrical substation and distribution system upgrades. Retrofits cannot be undertaken in an existing facility without a complete shutdown, which is not possible when all garages are required to be fully operational.

Recommended Approach - Scenario 3

Administration explored three scenarios (Attachment 1) as options to address and guide the renewal and development of existing and future ETS fleet storage, operations and maintenance facilities. The recommended scenario is designed to meet the City's objectives for growth and electrification, resulting from the hybrid scenario. The recommended approach and strategy builds on the existing storage and maintenance facilities, adds capacity and diversifies fuel sources. In addition to enhancing existing facilities, the strategy recommends constructing two new garages over the next 20 years which will alleviate the expected growth pressures on the transit network. The Strategy has the flexibility to integrate and adapt to evolutions in technology and the future decisions related to the Edmonton Metropolitan Regional Transit Commission.

ETS Fleet Storage and Maintenance Facility Project

Administration's first priorities are the development and delivery of a new southeast garage, in addition to the expansion of the Davies and Ellerslie facilities to accommodate additional maintenance requirements as the fleet grows. To meet the target for a new southeast garage in the 2027-2030 budget cycle, the land acquisition, design and delivery would commence in the 2023-2026 budget cycle.

The second phase is the expansion of existing facilities between 2025 and 2028 and will target the Richard Paterson Garage (5710 86 St NW), Thomas Ferrier Garage (8620 58 Ave NW) and Centennial Garage (15520 Ellerslie Rd SW). Adjusting capacity levels at these facilities will support the increased service demand due to fleet growth. As the fleet of electric buses expands, an expansion of the electric bus infrastructure is required at Kathleen Andrews Transit Garage (12403 Fort Rd NW) within the same timeframe.

Ideally, planning and design for a new northwest garage would begin as early as 2024, starting with functional programming and land acquisition activities. The northwest garage is expected to be complete in the 2031-2034 budget cycle, followed by progressive installation of electric bus infrastructure through 2040 or as the procurement timeline for electric buses dictates.

Opportunities for Growth Before 2027

Understanding that the bus fleet will require growth before 2027, Administration has been reviewing opportunities to accommodate additional buses and increase fleet electrification ahead of the completion of the new southeast garage. The following changes from the recommended approach could be considered:

- Establishing a satellite storage facility by acquiring an existing facility or building a new facility. The facility would be limited to storage and dispatch operations of diesel buses. As well as creating capacity, the satellite facility would ensure the work on existing facilities is completed safely and efficiently by temporarily housing operations on a rotating basis as facilities are expanded to accommodate the long-term growth.
- Accelerating the upgrades to the electric bus charging infrastructure of Centennial Garage and Kathleen Andrews Transit Garages to support additional electric buses.
- This revised approach would allow the decision on the investment into the Strategy to align with the capital budget deliberations for 2023-2026 by allowing for the new southeast garage to be delayed by one year while allowing for growth in the bus fleet.

The Strategy's success requires facility development to stay ahead of fleet growth, creating capacity and electrification requirements, flexibility, opportunity and efficiency across the facility and bus network. Additional infrastructure is needed to ensure that the maintenance of the bus fleet is well supported through the growth of the fleet. This growth will require new and expanded garages to support the growing needs of the bus fleet and Edmonton.

Budget/Financial Implications

Council approved the capital profile 20-20-2022 New Transit Bus Garage with \$6 million in funding in the 2019-2022 Capital Budget cycle through tax-supported debt. The profile provides funding to complete the strategy phase and begin the planning phase for the initial priorities.

ETS Fleet Storage and Maintenance Facility Project

The order of magnitude estimate for implementing the Strategy for fleet storage and maintenance facilities to address the growth, capacity and electrification needs is approximately \$1.4 billion, with investments up to 2040. This estimate is an order of magnitude as the project has completed the strategy phase and Checkpoint 1 of the Project Development and Delivery Model (PDDM), per Capital Project Governance Policy C591.

Given the order of magnitude of the investment required for the proposed expansion, the City continues to advocate to both the federal and provincial governments for funding support toward the construction of the proposed new transit garage and expansion of two existing garages as important infrastructure priorities.

Next Steps/Priorities

- \$4.1 million in funding remains available in Capital Profile 20-20-2022 to advance the project to the facilities planning phase. The following planning activities are planned for 2022:
 - Complete functional programming for the new southeast garage, Davies, Ellerslie expansions and the resulting Paterson operational impacts to PDDM Checkpoint 2;
 - Advance concept and preliminary design for Davies and Ellerslie expansions towards PDDM Checkpoint 3; and
 - Advance planning for establishing the satellite facility and the acceleration of the upgrades to the electric bus charging infrastructure of Centennial Garage and Kathleen Andrews Transit Garages.
- Additional funding may be required in the short-term to support the establishment of a satellite storage facility by acquiring land if necessary. Planning will be informing the needs in 2022.
- A critical component to the implementation of the Strategy is the acquisition of land to advance to concept and preliminary design for the new southeast garage. The current budget is insufficient to support the land acquisition estimated at \$45 million.
- If this strategy is supported by Council, Administration will return with a budget request through future capital budget processes. Depending on how quickly Council would like to advance the strategy the budget requirement for initial costs, such as the land acquisition costs for the new southeast garage, could be included for consideration in the Spring 2021 Supplemental Capital Budget Adjustment. Approving funding in advance of formal 2023-2026 capital budget deliberations in the fall of 2022, will reduce available funding for other priorities over the 2023-2026 budget cycle. However, Administration views electrification of the City's bus fleet and investment in supporting transit infrastructure as one of the City's top priorities.
- Project timelines will be reviewed and updated as these next steps progress.

COMMUNITY INSIGHT

This strategy supports the implementation of the energy transition strategy and The City Plan. This work is needed to support the City's services to Edmontonians; the facilities identified are required as municipal service support to ensure that transit serves Edmontonians now and in the future. Maintenance, operations and storage facilities are required to operate and maintain

ETS Fleet Storage and Maintenance Facility Project

transit service as the fleet and the city continues to grow. Public engagement, if required, will be evaluated on a facility by facility basis.

GBA+

The development of the ETS Fleet Storage, Operations and Maintenance Facility Strategy has identified some key areas and opportunities to address equity for all age groups, abilities and diverse demographics:

- **Accessibility:** ensure accessibility requirements for people with disabilities in the new and existing facilities and their surrounding areas are in place; accessibility is considered at each stage of the project design.
- **Safety:** Incorporate the needs of diverse demographics to improve safety within existing and new facilities.
- **Useability:** Consider how facility renewals (i.e. existing buildings) and new facilities improve the useability for those working in and for others who visit these facilities for business or other purposes.

The planning and design process will be guided by the principles of universal design, which speak to “the design of products and environments to be usable by all people, to the greatest extent possible, without the need for adaptation or specialized design.”

As the Strategy transitions into the Develop phase, GBA+ Analysis will be applied to ensure the projects are inclusive, decisions are evidence-based, work is effective and the process contributes to equality of outcomes.

ATTACHMENTS

1. ETS Fleet Storage and Maintenance Facility Project - Executive Summary
2. Ideal Scenario Implementation Timeline

ETS Fleet Storage and Maintenance Facility Project - Executive Summary

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Introduction

Edmonton Transit Service fleet storage and maintenance facilities are operating at full capacity. Both conventional and paratransit fleets cannot grow and respond to increased service demands in the future without significant investment in the design and construction of new and expanded facilities. Additionally, achieving greenhouse gas emissions targets by 2030 and beyond through fleet electrification cannot be realized within existing facilities. A long-term strategy has been developed to address these challenges.

The Edmonton Transit Service Fleet Storage and Maintenance Facility Strategy ("the Strategy") is designed to guide the renewal and development of existing and future Edmonton Transit Service fleet storage and maintenance facilities, addressing growth, capacity and electrification needs of the fleet through 2040.

The Strategy recommends the construction of two new operations and maintenance garages to integrate a fully electrified bus fleet located in the southeast and northwest quadrants of the city. The strategy also recommends a series of progressive upgrades, renewals and expansion to existing facilities to accommodate growth, capacity and electrification.

The land for the South East Garage is required to achieve the target of 2027; planning and design would commence and continue through the 2023-2026 budget cycle to support advancing the delivery activities.

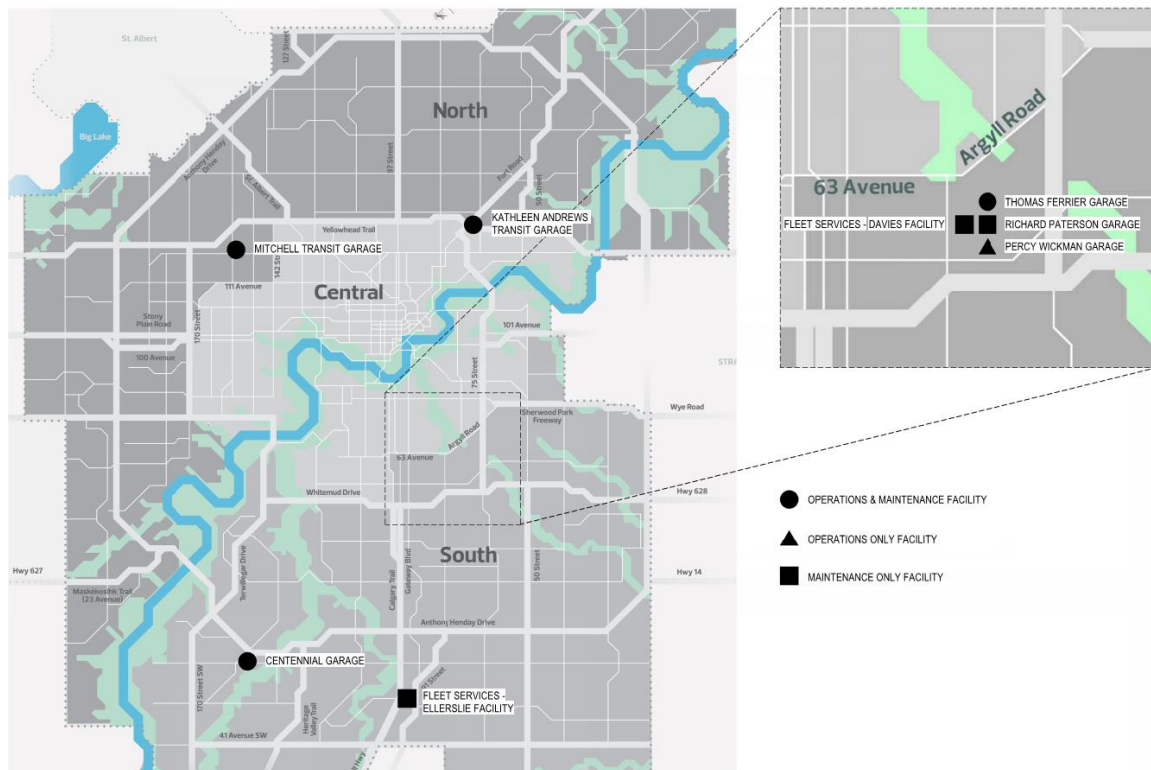
Project Methodology

The project followed the following process in the development of the Strategy:

- Assessed and documented the current state;
- Defined future requirements;
- Considered Electric Bus infrastructure requirements;
- Developed and evaluated scenarios and layout options to accommodate projected fleet growth and fleet mix through 2040; and
- Developed recommendations and next steps.

Current State

Existing Facilities Overview



Facility Details

Edmonton currently has four fleet storage and maintenance facilities that house the conventional transit mixed fleet of 962 buses (as of June 2020).

- Mitchell Transit Garage
- Kathleen Andrews Transit Garage
- Thomas Ferrier Garage
- Centennial Garage

Additional facilities support the operations of ETS:

- The Richard Paterson Garage provides heavy maintenance for the conventional transit fleet.
- Ellerslie Facility is home to the body shop. This space is part of the larger facility, which includes spaces dedicated to municipal fleet services.
- Percy Wickman Garage is home to the city's paratransit (DATS) operation. The fleet of 93 DATS buses is stored here.
- Davies Facility is where municipal fleet services provide DATS Fleet maintenance services.

Current Revenue Fleet

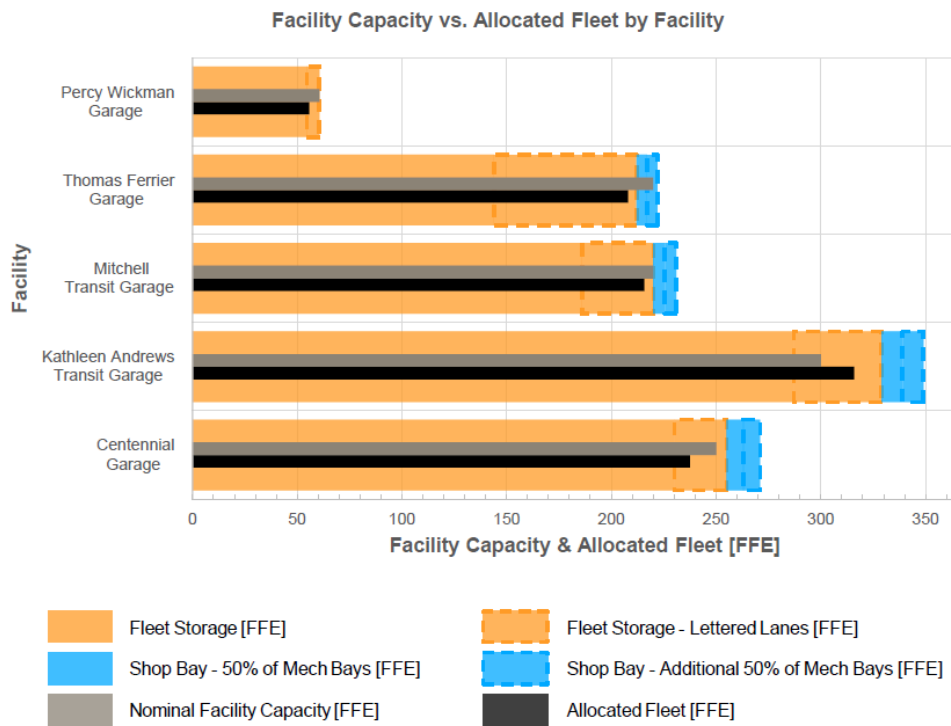
The charts that follow describe how the fleet is allocated across facilities (as of June 2020).

Bus Type	Conventional Transit				Paratransit
	Centennial Garage	Kathleen Andrews Transit Garage	Mitchell Transit Garage	Thomas Ferrier Garage	Percy Wickman Garage
60' Diesel	21	34	-	-	-
40' Diesel	196	235	197	190	-
40' E-Bus	10	30 ¹	-	-	-
30' Diesel	-	-	25	24	-
25' DATS Gasoline	-	-	-	-	93 ²
Total Fleet by Facility	227	299	222	214	93
Total Fleet by Service Type	962				93
Total Fleet [Count]	1,055				

¹ On order as of June 2020.

² Four DATS Ford E450 are damaged, out of service, and excluded from this value. Some service is contracted to third parties, including upwards of seventy-five contracted vehicles, ten vehicles for hire, five Leduc County paratransit buses, and five to six St. Albert Transit paratransit buses.

The figure that follows compares facility capacity to the allocated fleet.



The orange bar represents the total fleet storage space within each garage. The blue bar represents the total area within the maintenance areas. The grey bar represents the nominal capacity or the number representing the maximum storage capacity for each garage. The black is the actual fleet currently allocated to each garage.

The figure shows that the allocated fleet is near the top of each garage's total available storage area. In some cases, the assigned fleet is close to dipping into the shop areas, which is not ideal. The current fleet occupies the total available storage within each garage, and the fleet cannot grow without expanding the storage and maintenance facilities to accommodate the growth.

Future Requirements

Fleet Growth Projections

The ETS Fleet has not grown since 2013 aside from the recent addition of the Heritage Valley shuttle. A new garage in 2027 would be the first opportunity to expand the fleet in the last 13 years.

The Bus Network Redesign resets the foundation of the network and supports efficiency efforts utilizing the resources available. Preparing for growth to support our future city is the next step. This can be accomplished by ensuring that fleet storage and maintenance facilities are positioned to respond to an expanding fleet.

To meet The City Plan's objectives of the associated Mass Transit Network, the Bus Network Redesign and Greenhouse Gas Reduction targets, the ETS fleet needs to grow and transition from diesel to electric buses over the next 20 years (and beyond). Early projections to achieve the Mass Transit Network for a population of 1.25 million could require approximately 130 growth buses to support The City Plan's goals.

Strategic Alignment

The Strategy aligns with several transformational initiatives and is foundational to delivering on The City Plan and the four strategic goals of ConnectEdmonton. It is critical to support the new Bus Network's goals and the Mass Transit Network envisioned in The City Plan.

The Strategy supports building a green transit service and addressing growth requirements for our future city. The Strategy aligns with the Energy Transition Strategy and the current Greenhouse Gas Management Plan by providing a pathway to integrate an electric fleet in the future. Transitioning to a zero-emission transit fleet is a core objective of this work and currently calls for up to 440 electric buses (E-bus) to replace diesel buses by 2030.

Strategy Overview

Key Drivers

The current fleet occupies the total available storage within each garage. It cannot grow or add the required electrified fleet without significantly impacting operations and maintenance services in existing garages. Electric bus maintenance and charging stations require different infrastructure, including significant substation and distribution system upgrades that cannot be retrofitted into the existing occupied facilities when all current garages are required to be fully operational to maintain services across the transit network.

Sufficient facility storage capacity must be available before any fleet expansion or transition can occur.

Other key drivers of the Strategy are:

- A. **Growth.** New facilities are required to add buses to the fleet and transition from diesel (and gasoline) to electric. Other facilities must be expanded and upgraded to increase capacity to accommodate the growth and fleet changes.
- B. **Efficiency.** As the fleet grows and changes, parts storage and distribution is a necessary support to the growing fleet. This growth includes exploring a 'north-south parts storage and distribution hub' concept, the current use and repurposing the existing parts hub space within Richard Paterson Garage, and tire storage and distribution across all facilities.
- C. **Training Spaces** for drivers, transit fleet maintenance and the public via the Mobility Choices Training program are also needed.
- D. **Fleet Allocation** must be met to accommodate 30' and 60' diesel bus operations and maintenance at multiple locations.
- E. Additional drivers or issues include:
 - a. Finding a permanent home for the Heritage Fleet;
 - b. Allocating space to accommodate displaced outdoor storage compounds (i.e. Richard Paterson Garage - Edmonton Police Service and Heavy Maintenance Staging); and
 - c. Demolition of the Thomas Ferrier Garage tents, which are at the end of their lifecycle.

Scenarios

Two scenarios were explored that respond to the key drivers described previously to guide the renewal and development of existing and future ETS fleet storage and maintenance facilities.

Scenario 1 presented a decentralized model as follows:

- Two new operation and maintenance garages with room to store a larger number of articulated buses, maximizing the number of 60' shop bays to create flexibility to absorb future fleet mix changes (particularly, an increase in articulated buses).
- Ellerslie Facility is expanded to increase body shop capacity.
- The Richard Paterson Garage is to be expanded to increase heavy maintenance capacity, including the addition of sixty-foot shop bays.
- Davies Facility is retained 'as is' and continues servicing the DATS fleet, with incremental maintenance. DATS storage needs to be allocated to the new operation and maintenance garages.
- Changes to Thomas Ferrier Garage are required to accommodate changes at other sites and facilities. This work considers a facility expansion to accommodate the "Mobility Choices Training Program" and site reconfiguration to support bus driver training and relocation of the Heritage Fleet to a new operations and maintenance garage.
- Upgrade Centennial Garage's E-Bus charging capacity to support up to 40 E-Buses.
- Upgrade Kathleen Andrews Transit Garage E-Bus charging capacity to support up to 43 E-Buses.

Scenario 2 is presented as a centralized model and varies from Scenario 1 as follows:

- DATS operations and maintenance are consolidated at a single facility as follows:
 - Expand Richard Paterson Garage as a consolidated DATS operations and maintenance facility, replacing existing Percy Wickman Garage and Davies Facility spaces.
 - Conventional transit bodyshop and heavy maintenance are consolidated at Ellerslie Facility.
 - Expand Ellerslie Facility for additional body shop capacity and accommodate the Richard Paterson Garage heavy maintenance operation.

- Build two new operations and maintenance garages; upgrade Thomas Ferrier Garage, Centennial and Kathleen Andrews upgrades as described in Scenario 1.

Recommended Scenario

The preferred path forward was identified through a cross-organizational stakeholder evaluation of two scenarios, conducted and documented using a process called Multiple Account Evaluation which systematically evaluated the relative advantages and disadvantages of the options or scenarios presented.

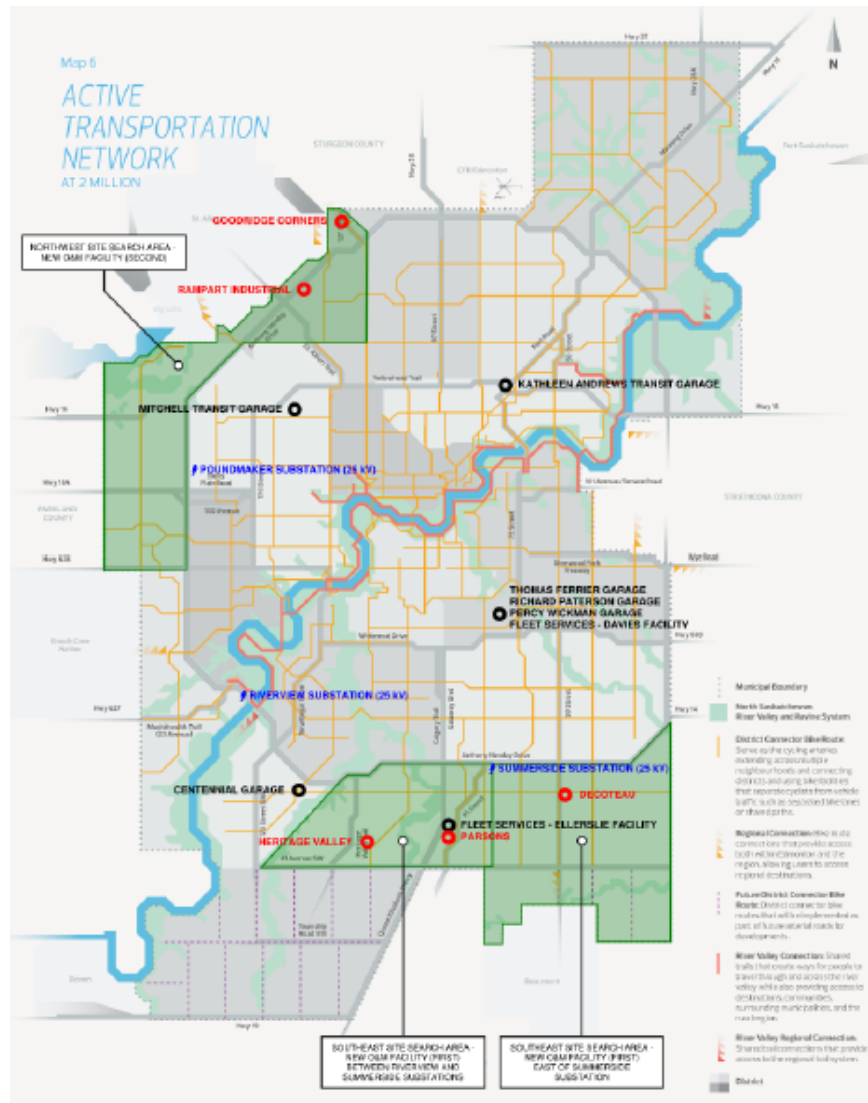
The evaluation process resulted in the adoption of a third scenario - Scenario 3 (Hybrid) - which captures the benefits of decentralization and mitigates some of the issues driving a centralized model. The following section provides a detailed description of the hybrid scenario, including individual descriptions of the work required at each location.

Strategy (Recommended Scenario 3)

The strategy, resulting from the hybrid scenario, recommends constructing two new operation and maintenance garages to integrate a fully electrified bus fleet located in the southeast and northwest quadrants of the city. This strategy will include a progressive series of upgrades, renewals and expansion projects within select existing facilities to accommodate growth, capacity and electrification.

This strategy's success requires facility development to stay ahead of fleet growth, capacity, and electrification requirements, creating flexibility, opportunity, and efficiency across the facility and bus network.

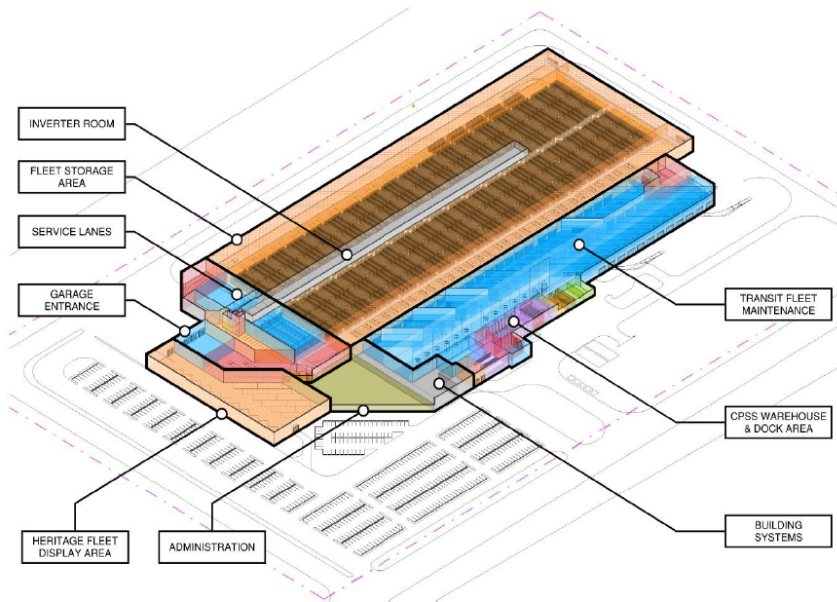
The areas highlighted in green on the map below indicate proposed locations for the new operation and maintenance garages to align with existing facilities and network connections.



Strategy Projects

2021-2026 • New Southeast Garage • New Build

New emissions neutral operations & maintenance facility accommodating the equivalent of 430 forty-foot bus equivalents (FFE); Fleet transitions to electric over time; Includes space for Heritage fleet; located in Southeast Edmonton.



2021-2024 • Davies Facility • Expansion

Existing facility; South shop expansion including six DATS Service bays and expansion of secure yard into the existing parking area.



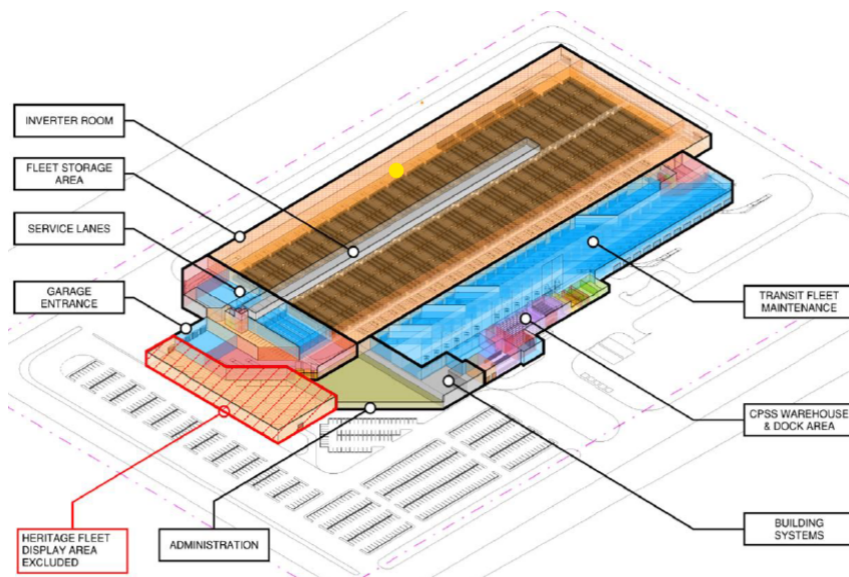
2021-2024 • Ellerslie Facility • Expansion

Existing facility; Body shop expansion includes four articulated bus body bays, three articulated bus paint/prep booths, one wash bay, and parking expansion.



2024-2032 • New Northwest Garage • New Build

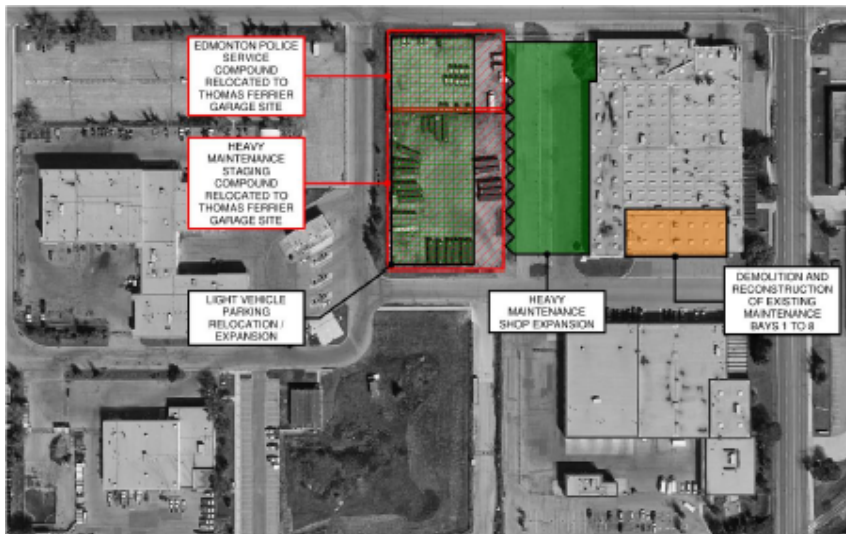
New emissions neutral operations & maintenance facility accommodating the equivalent of 430 forty-foot bus equivalents (FFE) (i.e. Electric buses) located in Northwest Edmonton.



2025-2028 • Richard Paterson Garage • Expansion / Site works

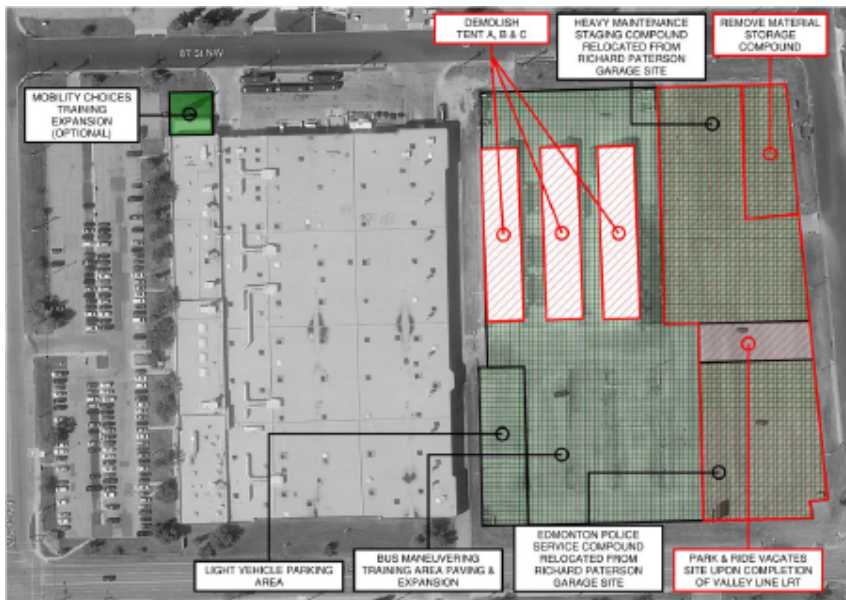
This existing facility will include heavy maintenance shop expansion to eight mechanical bays, one chassis dyno bay, and one wash bay. The work consists of selective demolition and reconstruction of bays one to eight with increased clear

height, increased bay length, and in-ground hoists. Existing compounds (i.e. EPS and Maintenance Staging) will be relocated to the Thomas Ferrier Garage site and replaced with an expanded light vehicle parking area.



2025-2028 • Thomas Ferrier Garage • Demolition / Site Works / Expansion

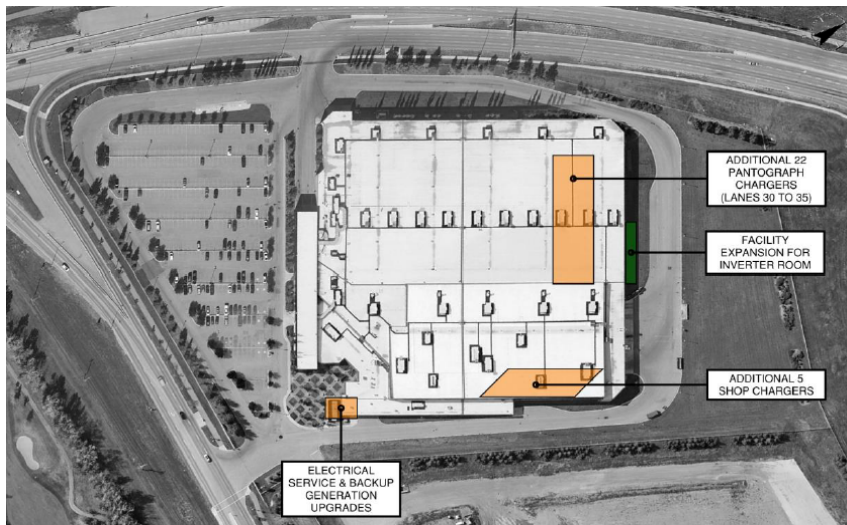
Demolish tents; New site for EPS and maintenance staging compounds; Driver Training area paved and expanded; Mobility Choices Training Program expansion (optional - may be located at the first NEW Garage).



2026-2027 • Centennial Garage • Expansion / E-Bus Infrastructure

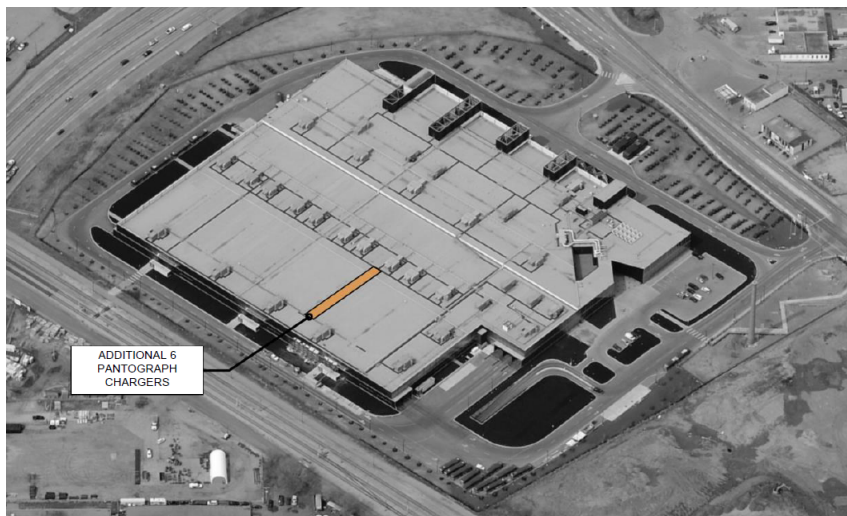
Existing facility; Expansion of the inverter room; Increased electric bus charging infrastructure from four to 26 pantograph chargers and increase from one to six

shop chargers to support a maximum of 40 E-Buses.



2026-2027 • Kathleen Andrews Transit Garage • E-Bus Infrastructure

Existing facility; Increase from 22 to 28 chargers to support a maximum of 43 E-Buses.



Implementation Timeline

Attachment 2 provides a high-level overview of the project timelines (i.e. program, design and construction) and shows when and how a facility's capacity is impacted, triggering fleet growth and electrification opportunities. This timeline assumes that funding is available for continuous project development and delivery.

Given current facility capacities, fleet growth is flat until the end of 2026. Based on the timeline, fleet growth can begin in 2027 with conventional and DATS growth buses allocated to the New Southeast Operations and Maintenance Garage. The overall fleet is redistributed and balanced between all garages.

Upon occupancy of the New Northwest Operations and Maintenance garage at the end of 2032, the fleet can again be redistributed and balanced between six operations and maintenance garages, with additional conventional and DATS fleet growth distributed equally to the new facilities.

This timeline supports meeting the Mass Transit Network projections for a population of 1.25 million and supporting The City Plan and the City Operations GHG Management Plan goals.

Preliminary Cost Estimates

The order of magnitude costs of the Strategy implementation is summarized below by facility and capital budget cycle. Per the PDDM, this is the Strategy and only to PPDM Checkpoint 1; the costs described below are defined as Class 5 and have an expected degree of accuracy of -30% to +50%.

Estimated Project Costs

	Order of Magnitude Costs (\$'000)					
	2019-2022	2023-2026	2027-2030	2031-2034	Future Years	TOTAL
New Southeast O&M	57,000	410,000	165,000	-	-	632,000
Davies Facility	300	6,000	-	-	-	6,300
Ellerslie Facility	700	21,000	-	-	-	21,700
New Northwest O&M	-	57,000	230,000	250,000	95,000	632,000
Richard Paterson Garage	-	1,000	34,000	-	-	35,000
Thomas Ferrier Garage	-	500	5,000	-	-	5,500
Centennial Garage	-	500	21,000	-	-	21,500

Attachment 1

Kathleen Andrews	-	3,000	3,000	-	-	6,000
TOTAL	58,000	499,000	458,000	250,000	95,000	1,360,000

*Calculations do not include contingency and escalation costs.

The estimates include costs for the facility infrastructure and the electric bus infrastructure, such as the increased capacity of the electrical systems and charging stations. There remain some costs that are *unknowns*. These are excluded from the above and will be defined as more information becomes available in later phases of each project. Exclusions include:

- EPCOR Distribution/Transmission costs
- Cost of contaminated soil removal and hazardous material (e.g. asbestos, lead, PCB, etc.) removal
- Fleet or additional equipment

The Strategy does not include the cost of buses, or the operating impacts of capital. These costs are developed as part of the planning and design for each individual facility.

Additional Considerations

It is critical to interpret the strategy's information and analysis at a point in time and could require adjustments, refinements, or potentially significant changes during implementation. These include, but are not limited to:

- Timeline adjustments and construction phasing plan to align capital expenditures with growth projections.
- Further development of the initial concepts presented in the report will be refined during the functional programming, schematic design, design development and construction documentation process, per the Project Development and Delivery Model (PDDM), per Capital Project Governance Policy C591.
- Ongoing refinement of the cost estimate at key project milestones to tighten the accuracy range as design definition increases and serve as a tool to drive cost versus value decisions made during the design process (i.e. value engineering).
- Refinement of the type, scale and design of infrastructure as more experience is gained with operation and maintenance of the initial E-Bus fleet, particularly the maintenance requirements (i.e. time-utilization of the maintenance bays) and charging requirements (optimization of the charging infrastructure from a capital cost and operational cost perspective).

The strategy is recommended to be revisited as part of annual planning activities for

all branches involved in this study.

- Ongoing monitoring of fleet projections and corresponding realignment of the Strategy on an annual basis is recommended.
- Monitor the current and long term potential impacts of the COVID-19 pandemic related to infrastructure needs, facility planning, and capital planning.

Electric Buses

The Strategy assumes all future E-Bus fleet growth will be based on the current Proterra model. This means that all programming will be based using the dimensions, charging equipment, and operational basis of the Proterra model. (note: Proterra is the manufacturer of the Electric Bus the City has chosen to purchase buses from). This assumption should be closely monitored and adapted as the Strategy is implemented.

The introduction of other fleet types such as Hydrogen fuel-cell electric buses or electric articulated buses is possible. However, infrastructure planning must be monitored and adjusted to respond to changes to fleet growth, capacity and electrification targets.

Ideal Scenario Implementation Timeline

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	Total 2040	
New Southeast O&M	Program, Design & Construction						Paterson Workaround														
							Capacity 430 FFE; phase-in E-Bus infrastructure													395 FFE	
Davies Facility	Program, Design & Construction																				
	Existing maintenance capacity			Increased DATS maintenance capacity																	
Ellerslie Facility	Program, Design & Construction																				
	Existing Body Shop capacity			Increased Body Shop capacity																	
New Northwest O&M				Program, Design & Construction																	
													Capacity 430 FFE; phase-in E-Bus infrastructure						393 FFE		
Richard Paterson Garage					Program, Design & Construction																
	Existing Heavy Maintenance capacity					Workaround		Increased Heavy Maintenance capacity													
Thomas Ferrier Garage						PDC															
	Facility capacity 208 FFE					Reduce capacity to 160 FFE and reallocate to New O&M.														160 FFE	
Centennial Garage						PDC															
	Facility capacity 238 FFE					Reduce capacity to 228 FFE; increase from 4 to 26 chargers; increase E-Buses														228 FFE	
Kathleen Andrews Transit Garage						PDC															
	Facility capacity 300 FFE					300 FFE; increase from 22 to 28 chargers; increase E-Buses														300 FFE	
Mitchell Garage	Facility capacity 208 FFE					Reduce capacity to 190 FFE and reallocate to New Southeast O&M														190 FFE	
Percy Wickman Garage	Facility capacity from 93 up to 112 DATS buses					Reduce capacity to 101 DATS and allocate growth to New O&M(s)														101 DATS	

By 2032 and the opening of the New Northwest Operations and Maintenance Garage, the overall capacity of the facilities exceeds the number of buses in the fleet, creating flexibility to move buses between facilities and allow for future growth as well.



Integrated Infrastructure Services

Infrastructure Planning and Design



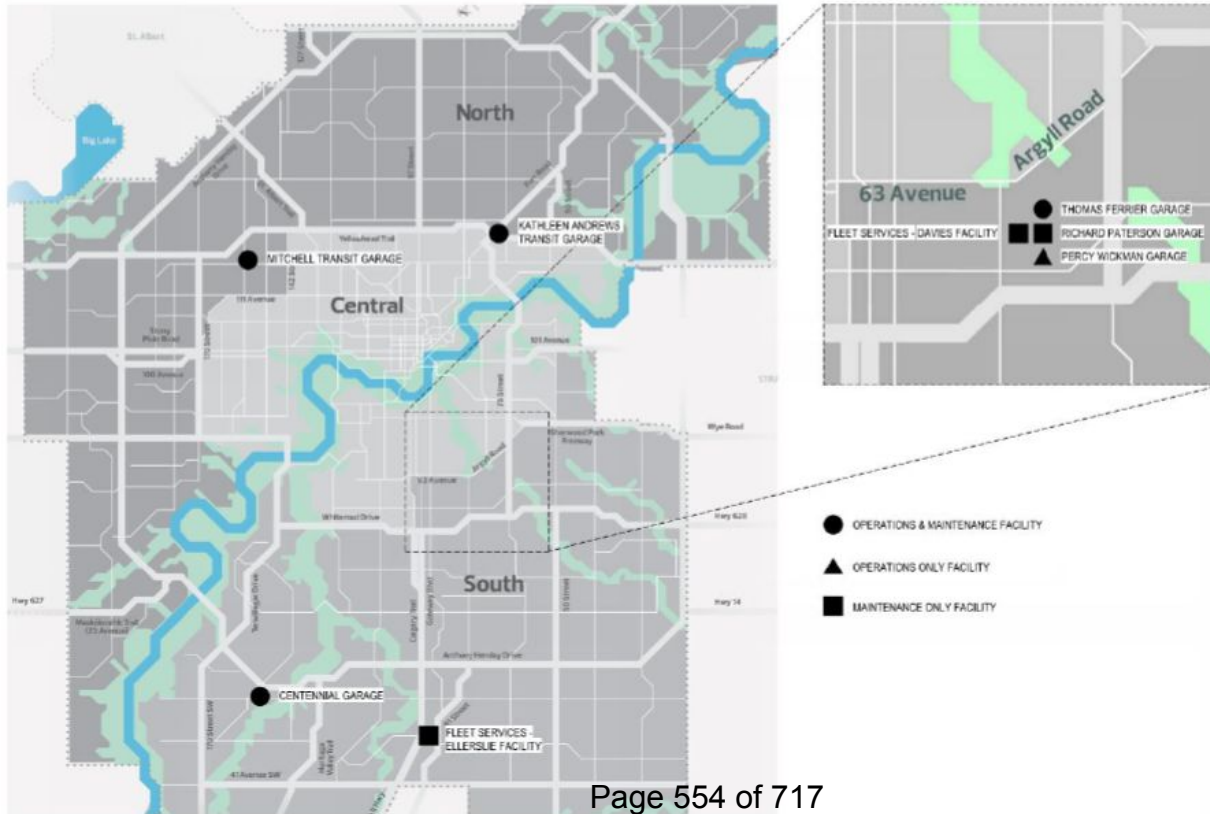
Edmonton

ETS Fleet Storage, Operations and Maintenance Facility Project

City Council
February 22, 2022

IIS00416

Current State

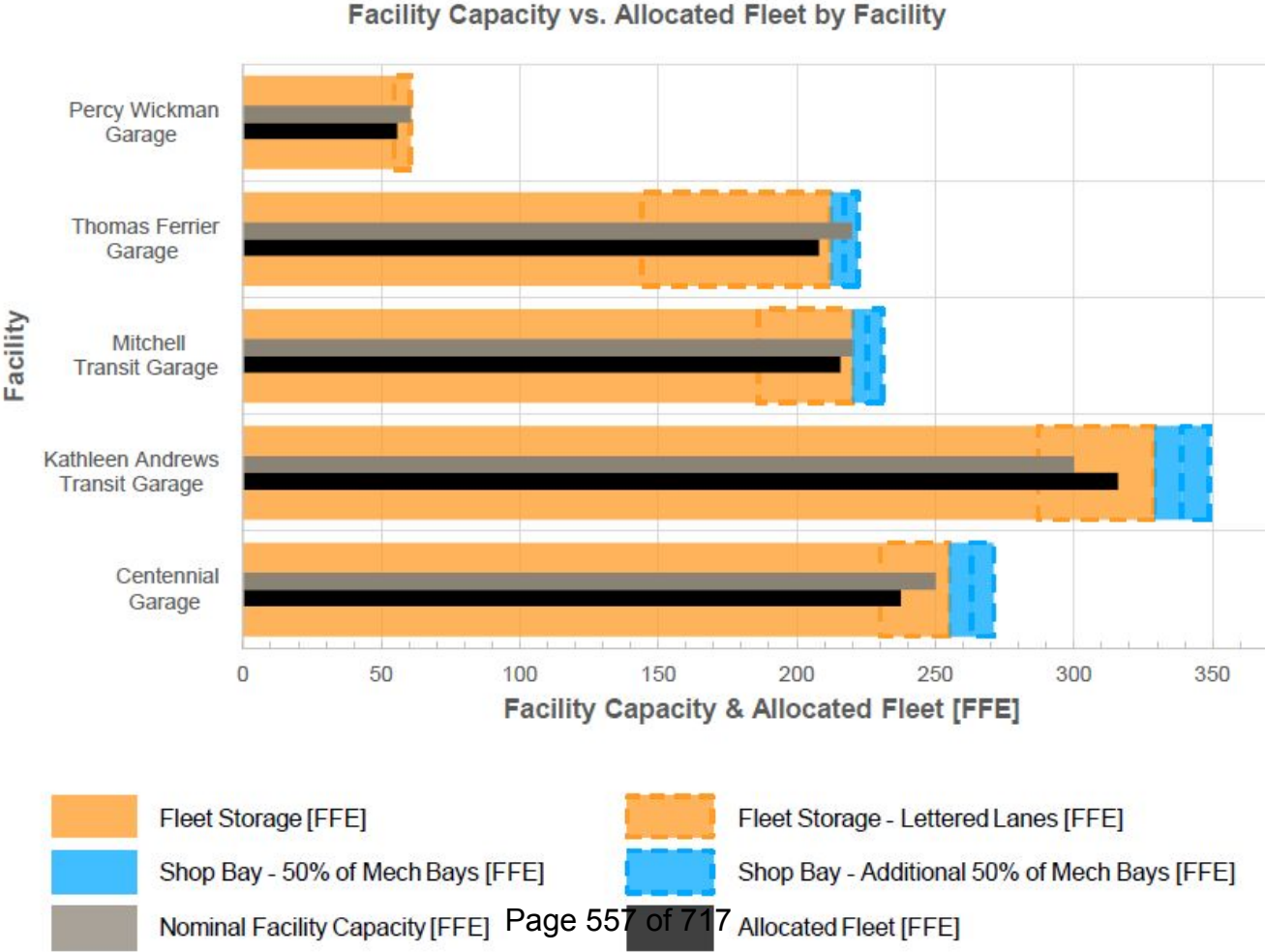


Background

- ETS fleet storage, operations and maintenance facilities are operating at full capacity, unable to support fleet growth and achieve the City's greenhouse gas emission reduction targets.
- New facilities and renovations to existing facilities are required to support future growth and electrification of the bus fleet.
- The long-term strategy has been developed to guide fleet growth, electrification, facility renewal and development of facilities through 2040.

Bus Garage Operations

- Transit service delivery:
 - Dispatch
 - Service deployment
 - Operator support
 - Fleet maintenance
- 24/7 operation
 - First bus of the day leaves at 3:41am
 - Last bus of the day arrives back at 4:57am



Strategic Alignment: Electrification

Edmonton's Community Energy Transition Strategy calls for the transition of the bus fleet to electric or zero emissions fuel

- ETS currently operates 40 electric buses
- By 2034, the Strategy would provide infrastructure for 450 electric buses
- Initiative underway exploring hydrogen electric buses and could help address infrastructure challenges for zero-emission fuel

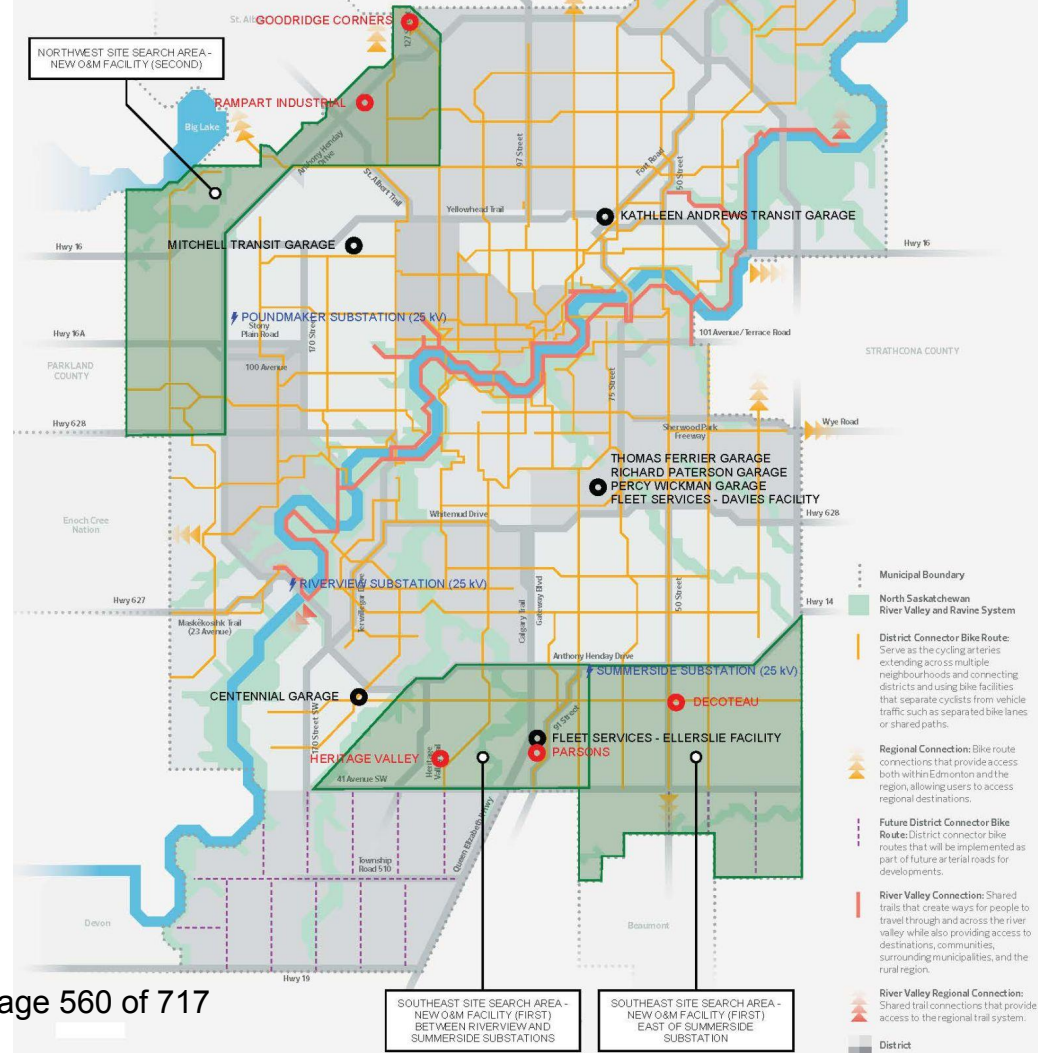
Strategy Overview

New Garage in south east quadrant

Progressive renewal and expansion of existing facilities

- Davies
- Ellerslie
- Paterson
- Ferrier
- Centennial
- Kathleen Andrews

New Garage in north west quadrant



Opportunities for Growth Before 2027

- Establishing a satellite storage facility
 - Creates capacity for expansion of the fleet ahead of a new full service garage
 - Creates capacity in existing facility for safe and efficient expansion and upgrades
- Accelerating the upgrades to the electric bus charging infrastructure of Centennial Garage and Kathleen Andrews Transit Garages to support additional electric buses

Next Steps - Strategy Development

Work in Progress

- Complete Functional Programming for New Southeast Garage (PDDM Checkpoint 2)
- Advance concept and preliminary design for Davies and Ellerslie facility expansions (PDDM Checkpoint 3)
- Advance planning for a satellite facility and the acceleration of the upgrades to the electric bus charging infrastructure of Centennial Garage and Kathleen Andrews Transit Garages

Future Requests

- Land acquisition is on critical path to advance design & construction for the New Southeast Garage (estimate of \$45M)

Potential Grant Funding Options

- **Federal Zero Emissions Transit Fund**
 - \$2.75B over next 5 years to support bus fleet electrification and supporting infrastructure, including charging infrastructure and facility upgrades. Program's primary focus appears to be ZEB procurement
- **Federal Permanent Transit Fund**
 - Permanent measure of \$3B annually beginning in 2026/27 to support public transit initiatives. Program currently in development; allocation method unknown.
- **Canada Community Building Fund (formerly federal Gas Tax Fund)**
 - Permanent measure currently at \$2.2B annually, allocated to municipalities on a per capita bases; funding grows incrementally with inflation (2% indexing) and population growth.
- **Local Government Fiscal Framework (MSI replacement)**
 - Will replace MSI in 2024 when program ends; provincially legislated annual funding based on a revenue sharing formula. Program parameters expected to mirror MSI.

Recommendation

That Urban Planning Committee recommend to City Council:

That the strategy outlined in the February 15, 2022, Integrated Infrastructure Services report, IIS00416, be approved.

Thank you.

Questions?

Integrated Infrastructure Services
Infrastructure Planning and Design

Edmonton



2022 COUNCIL CALENDAR CHANGES

RECOMMENDATION

1. That a City Manager and City Auditor Performance Evaluation Committee meeting be scheduled on March 15, 2022, from 9:30 a.m. to 11:00 a.m.
2. That the orders of the day for the March 18, 2022, Audit Committee meeting be changed to adjourn at 11:30 a.m.
3. That an Audit Selection Committee meeting be scheduled on March 18, 2022, from 11:30 a.m. to Noon for the purpose of discussing recruitment timelines for a new public member.
4. That the orders of the day for the April 12, 2022, Urban Planning Committee meeting be changed to adjourn at 3:00 p.m.
5. That a Special Audit Committee meeting be scheduled on April 12, 2022, from 3:30 p.m. to 5:00 p.m.

Report Purpose

Council decision required

REPORT

This report proposes changes to the 2022 Council Calendar.

It is recommended that a City Manager and City Auditor Performance Evaluation Committee meeting be scheduled on March 15, 2022, for the consultants to provide an update to Committee regarding the City Manager and City Auditor Performance Evaluation process.

The Audit Selection Committee is comprised of the members of Audit Committee who are elected officials. The Audit Selection Committee makes recommendations to Council on the appointment of the public members. A vacancy will occur in 2022 and the purpose of this meeting is to review the recruitment times and profile for the upcoming vacancy.

Administration is also recommending that a Special Audit Committee meeting be scheduled on April 12, 2022, to discuss the consolidated financial statements. Due to provincial legislation,

2022 Council Calendar Changes

these statements need to come to City Council after the end of year financial updates, currently scheduled for the March 14, 2022, City Council meeting, but before May 1, 2022. In order to accommodate this need, Administration is recommending that the orders of the day for the April 12, 2022, Urban Planning Committee meeting be changed to adjourn at 3:00 p.m., and a Special Audit Committee meeting be scheduled from 3:30 p.m. to 5:00 p.m.



EXECUTIVE COMMITTEE REPORT

Affordable Housing Exemptions

THIS ITEM WAS REQUISITIONED TO CITY COUNCIL WITHOUT A COMMITTEE RECOMMENDATION

Administration Recommendation

That the February 16, 2022, Financial and Corporate Services report FCS00721, be received for information.

History

- At the February 16, 2022, Executive Committee meeting, Mayor A. Sohi and Councillor A. Stevenson requisitioned the February 16, 2022, Financial and Corporate Services report FCS00721 to City Council without a Committee recommendation.
- At the February 16, 2022, Executive Committee meeting, the February 16, 2022, Financial and Corporate Services report FCS00721 was considered.
- The Committee heard from M. Soroka, Jasper Place Wellness Centre; G. Puligandla, Canadian Mental Health Association - Edmonton Region; C. Halton and C. McDonald, Right at Home Housing Society; N. Wang, Multicultural Health Brokers Cooperative; N. Lilley, HomeEd; C. Cunningham, NiGiNan Housing Ventures; M. Hoosein, Cvida; R. Appleyard, Matheson Seniors Housing Corporation; I. Martin-Lindsay, Alberta Seniors and Community Housing Association; D. Kurpjuweit, The Mustard Seed Foundation; L. Murphy, The Edmonton Coalition on Housing and Homelessness; and B. Lafortune, Public Interest Alberta.

Attachment

February 16, 2022, Financial and Corporate Services report FCS00721

AFFORDABLE HOUSING EXEMPTIONS

RECOMMENDATION

That the February 16, 2022, Financial and Corporate Services report FCS00721, be received for information.

Report Purpose

Information only.

Council is being informed of affordable housing providers' current tax exemption status as well as the options available to pursue other exemption approaches.

Previous Council/Committee Action

At the June 28, 2021, Executive Committee meeting, the following motion passed:

That Administration provide a report to Executive Committee by Fourth Quarter 2021 with:

- a. an analysis of the impact that exempting some or all forms of affordable housing from municipal taxation would have,
- b. options for implementing such an exemption, and
- c. any other options that may be feasible to assist affordable housing providers, including the possibility of legislative change.

Executive Summary

- Property tax exemptions are governed by Provincial legislation.
- Affordable housing is generally considered taxable under the legislation with a few exceptions.
- Many affordable housing providers have approached Administration over the years to request property tax exemptions in order to allow them to further the achievement of their mandates, including in the past year, the Metis Nation of Alberta, HomeEd and Right At Home Housing.
- Council has the authority to exempt any non-profit organization from municipal property tax, but a grant-based approach is generally recommended if further municipal intervention is desired.

AFFORDABLE HOUSING EXEMPTIONS

- Administration plans on continued advocacy to the Government of Alberta with the proposal to have the Province pay grants-in-lieu of property taxes on affordable housing properties, referencing the precedence of a similar approach for seniors housing accommodations.

REPORT

In Alberta, property tax exemptions are governed by the *Municipal Government Act* and the *Community Organization Property Tax Exemption Regulation*. The City must follow this legislation when determining what properties are eligible for property tax exemptions.

The most relevant section of the *Municipal Government Act* is section 362, which specifies many of the property types that may be eligible for property tax exemptions. This section includes properties such as schools, universities, hospitals, nursing homes, religious properties, cemeteries, and certain properties owned or held by non-profit organizations. The section specifically exempts properties held by management bodies established under the *Alberta Housing Act* that are used to provide seniors with lodge accommodations, but it does not include management bodies and affordable housing providers more generally.

Because affordable housing is not specifically defined or referenced as an exempt property type, affordable housing providers have often suggested that they should qualify for an exemption as a non-profit organization. However, when determining which properties qualify as exempt non-profit entities, the Government of Alberta's criteria under the *Community Organization Property Tax Exemption Regulation* includes the requirement that individuals are not restricted from using the property on any basis including:

- (a) race, culture, ethnic origin or religious belief,
- (b) the ownership of property,
- (c) the requirement to pay fees of any kind, other than minor entrance or service fees, or
- (d) the requirement to become a member of an organization.

Affordable housing does not typically meet these exemption criteria in that (1) renting to specific individuals is considered to be a fee, and (2) those who rent become the lessee, making the unit no longer held by the non profit organization or publicly accessible. Each of these factors disqualifies them from receiving an exemption as a non-profit organization as laid out in the legislation. This interpretation has been confirmed in a number of Assessment Review Board hearings, including a recent decision in Edmonton where the Assessment Review Board agreed that an affordable housing provider could not qualify under this section because of their use restrictions in place.

While affordable housing is taxable by default under provincial legislation, some categories of affordable housing property remain exempt for other reasons. These generally include: (1) some seniors housing (specifically exempted under the legislation); (2) property owned by Alberta Social Housing Corporation (i.e. provincially owned affordable housing units, which are exempted by their own Provincial regulation); (3) properties exempted through private member's bills; and (4) properties owned by the City and run by management bodies under the *Alberta Housing Act*.

It should be noted that the City has inconsistently applied exemption legislation in the past. This has meant that a number of properties that should likely be taxable have been exempted. The

AFFORDABLE HOUSING EXEMPTIONS

City has recently contacted these affordable housing providers to gather further information on their property's use and provide notification that their taxable status may change in 2023. New applications for tax exemption status are only approved if the organizations can meet the criteria outlined in the *Municipal Government Act* and the *Community Organization Property Tax Exemption Regulation*. This process may also result in up to 64 affordable housing properties that had previously been exempted becoming taxable starting in 2023.

City Council Exemption Powers

A non-profit organization that does not meet the exemption tests under *Community Organization Property Tax Exemption Regulation* can still be exempted from municipal property tax by City Council under section 364 of the *Municipal Government Act*. Such an exemption would be for the municipal portion only (approximately 75 per cent of their total tax bill), keeping the provincial education tax portion taxable. This approach would not remove the municipal tax burden entirely, but rather shift it to the remaining tax base. Historically, increased tax exemptions are reflected as decreased growth revenue. This means that exempting this property type would have the same financial impact as approving a tax increase for the remaining tax base, including on housing options that are currently attainable for lower income residents.

Administration has gathered an inventory of known affordable housing properties in Edmonton and analyzed the tax impact of exempting the taxable inventory. Current estimates suggest the potential cost of implementing such an exemption for affordable housing providers (who are not already exempted) would be around \$5 million. However, these estimates are based off an inventory that may not be complete, and as a result, the overall cost may be higher. Council may also choose to provide a partial tax exemption or an exemption for specific kinds of affordable housing that may affect the total cost outlined.

An exemption approach would be administered by way of an application process. The number of qualifying applicants would be determined by the definition the City puts in place for qualifying affordable housing types and how that definition is subsequently interpreted by the Assessment Review Board.

Alternative Grant-Based Approach

An alternative approach would be for Council to create a grant program that could off-set the municipal taxes currently paid by affordable housing providers. The grant would have a similar cost to the exemption, but has several advantages over an exemption-based approach:

- A grant is not subject to the same review by the Assessment Review Board, meaning the City would be the final arbiter of whether a property qualifies.
- A grant could cap the potential cost the City incurs, thus adding additional financial predictability for the City.
- The City could more effectively advocate to the Provincial government for additional affordable housing funding.
- A grant can be designed to go beyond providing property tax relief if Council wishes to provide additional support. Finally, a grant program would also respond easier to housing needs that may emerge or change over time.

AFFORDABLE HOUSING EXEMPTIONS

Similar to the exemption-based approach, a grant would be administered on an application basis. An application approach will allow affordable housing providers to self-identify, which should help to improve the City's tracking of the affordable housing inventory. Either approach would also enable City Council to target specific segments of the affordable housing sector (for example, Indigenous housing, deeper subsidy housing or units owned by the City of Edmonton's Nonprofit Housing Corporation (homeEd), if desired. If Council wishes to pursue supporting affordable housing providers through tax reductions, a grant-based approach is recommended and Administration can return to Council with criteria for qualifying organizations as well as a procedure to administer such a program.

Provincial Advocacy Options and Next Steps

Affordable housing has generally been the responsibility of the Governments of Alberta and Canada, however the effects of insufficient housing in Alberta are more closely experienced by municipalities, particularly cities such as Edmonton. This is partly because vulnerable people in need of housing, healthcare and other supports may move to larger centres to access those supports. The need for housing in major cities is a concentrated reflection of the need that exists across the province. Provincial support and funding towards affordable housing could mitigate further costs being passed on to municipalities, and continued advocacy to that end is recommended.

The Government of Alberta is presently working on implementation of an affordable housing strategy and is engaging stakeholders for input. The provincial government is exploring affordable housing tax exemption options, which were originally raised during its affordable housing review process. Administration is participating in the provincial engagement process and is considering two different high-level approaches to inform the City's feedback:

1. Recommending that the Government of Alberta provide offsetting tax grants for affordable housing properties. This form of Provincial support would effectively remove the property tax burden on affordable housing providers without reducing municipal revenue. Such an approach is not without historic precedent as the Government of Alberta currently provides offsetting grants for the property taxes of some seniors' accommodations. This approach would also ensure a full property tax offset, including provincial education tax, rather than the partial offset available through Council's exemption powers or a grant program. One mechanism to achieve this is the provincial government designating a list of affordable housing properties under the *Alberta Housing Act* and then paying grants to offset the taxes on those properties.
2. Advocating for changes to the regulations to enable all affordable housing (that meet certain criteria) be exempted from property taxes by legislation (with or without offsetting grants). Regulatory changes could also address the specific barriers identified by Indigenous housing providers. This approach would result in further cost downloading to municipalities and bears the additional risk that the Government of Alberta could define affordable housing more broadly and increase the impact on the City's property tax revenues.

The Government of Alberta's new 10-year affordable housing strategy acknowledges the province's role as both a funder and regulator of affordable housing. The Province also has an

AFFORDABLE HOUSING EXEMPTIONS

existing program to provide grants in lieu of taxes for a variety of properties, and adding affordable housing to that program would require increased provincial funding.

Supplemental information on affordable housing exemptions in Alberta is provided in Attachment 1.

Legal Implications

Tax exemptions are legislated under sections 361 to 365 of the *Municipal Government Act*. Further details regarding property tax exemptions are primarily covered in the *Community Organization Property Tax Exemption Regulation*, but other regulations and private member bills can affect property tax exemptions.

City Council has the authority under section 364 of the *Municipal Government Act* to exempt property held by a non-profit organization from municipal property tax. Education tax would still be requisitioned by and owed to the Government of Alberta.

COMMUNITY INSIGHT

To understand the potential impact on partner agencies that provide affordable housing, Administration connected with a number of providers to discuss how changes to their property tax exemption status would impact their operations. Providers who do not already receive exemptions were strongly in favour of accessing them, and those already benefiting from exemptions indicated the important role those exemptions play in helping achieve more affordability for their tenants. According to the providers consulted, a switch to non-exempt status for property taxes would create potentially severe impacts and risks to their organizations and properties.

The following concerns were heard from those consulted:

- Providers estimated that property taxes could account for a significant percentage of their annual operating expenses, ranging from 13 to 25 per cent.
- The increase in operating expenses are challenging to offset, since these non-profit organizations have limited sources of revenue from which to draw. Providers cited the following measures that could be explored in order to be able to pay property taxes:
 - reductions in staffing levels, which in some cases means that support services may no longer be in place for those who need them to successfully stay housed;
 - reductions in support service levels could further lead to a reduction in affordable housing units available;
 - increases to rental rates, which also could have the dual effect of reducing overall availability of affordable and affordable units and puts existing tenants at risk of homelessness;
 - sale of properties that are no longer financially viable as non-market housing or as a means to generate revenue, which could have the dual effect of reducing overall availability of affordable units and puts existing tenants at risk of homelessness.

In addition to the direct impacts on their operations, the housing providers also shared concerns about issues of fairness and equity, citing inconsistent application of the tax exemption

AFFORDABLE HOUSING EXEMPTIONS

legislation and regulations, both within their respective portfolios but also across the affordable housing sector.

Their concerns were as follows:

- There may be inequities created within their respective portfolios between properties that have the same uses.
- Section 362 of the *Municipal Government Act* exempts some affordable housing properties from taxes, such as those held by management bodies established by the provincial government and used to provide lodge accommodations to seniors. Some housing providers claim that this creates fairness issues because many of those exempt properties have the same uses and operate under similar conditions as their own properties that may be at risk of non-exempt status.
- HomeEd, the City of Edmonton's wholly-owned nonprofit housing corporation, also suggested it could be seen as unfair that the City of Edmonton exempts properties it owns from paying property tax but does not exempt HomeEd, of which the City of Edmonton is the sole owner. HomeEd believes this approach also varies from other Alberta municipalities, who have exempted the affordable housing corporations they own from property taxation.
- Some affordable housing providers pointed out that several large cities across Canada provide property tax exemptions for some types of affordable housing, though provincial regulatory environments differ. Attachment 1 contains more information regarding this jurisdiction scan.
- Some housing providers' properties are focused on serving Indigenous peoples. Indigenous-centered housing, which may include programs that recognize their unique cultural heritage and historical trauma, represents a targeted response to the housing needs of Edmonton's most marginalized. Currently, the legislation disqualifies properties that are restricted to a particular racial, cultural, ethnic, or religious group from tax exemption. The housing providers suggest that this is systemically unjust.

GBA+

Edmontonians in need of safe, adequate and affordable housing are among the most vulnerable. Difficulty accessing housing can often be accompanied by difficulty accessing food, health care, transportation, and other services. In addition, those in need of affordable housing can be excluded from full participation in community life due to the barriers created by mental illness, addictions, trauma, and systemic discrimination.

The provision of affordable housing helps to alleviate pressures on vulnerable populations by providing the security and stability needed to flourish. However, the development of housing can be challenging. Non-market affordable housing providers may be at a disadvantage relative to other housing providers due to their reliance on government subsidies and grants to develop housing projects. Below market rents and lack of ongoing operational funding can also create sustainability challenges for these providers to maintain and expand their supply of housing. For example, nearly twice as many Edmonton households renting social and affordable housing indicated that their dwelling needed major repairs (12.6 per cent) as compared to other renter

AFFORDABLE HOUSING EXEMPTIONS

households in the City (6.7 per cent). At the national level in 2018, nearly three times as many households living in social and affordable housing required adaptations to their dwelling because a member of their household had a physical or mental disability compared to renter households in general (18.5 per cent vs. 6.2 per cent).

Indigenous peoples in particular have been overrepresented among those experiencing homelessness in Edmonton. Despite making up approximately five per cent of Edmonton's population, Indigenous peoples comprise over 60 per cent of those known to be experiencing homelessness. The housing needs of urban Indigenous peoples are unique and shaped by Canada's colonial history which continues to impact their economic, health and social well-being. Indigenous peoples need access to more safe and appropriate housing as many move to cities for education, jobs, healthcare, and safe housing.

The City administers a grant funding program to assist non-market affordable housing providers in acquiring and constructing more affordable housing. Further, a focus on dedicating units for Indigenous peoples has been adopted to recognize and address the overrepresentation of Indigenous peoples among those in need. In addition, the City is working on an Indigenous Affordable Housing Strategy at the direction of City Council to enable more Indigenous-led affordable housing projects. The Strategy is scheduled to be presented to Council in Q2 2022.

ATTACHMENT

1. Supplemental Information

Historical Government Involvement

Both the provincial and federal governments compensate municipalities annually for certain types of exempt properties. In Alberta, provincial grants are known as “Grants in Place of Taxes” and federal grants are known as “Payment in Lieu of Taxes”. These grants are intended to offset revenue that would otherwise have to be generated through property tax.

Until 2017, the affordable housing run under the Alberta Social Housing Corporation was considered taxable and the Government of Alberta paid Grants in Place of Taxes on properties operated by this organization. In 2017, the Province passed a regulation specifically making properties owned by Alberta Social Housing Corp. exempt from taxes. This decision resulted in a revenue shortfall for the City of Edmonton of \$3.8 million as the Province no longer paid grants in lieu of taxes on those properties.

The government chose not to exempt all affordable housing providers, but only those owned by the Government of Alberta. Beyond creating inconsistency, this further corroborated the Province’s direction to keep other affordable housing properties taxable.

Cross-Jurisdictional Scan

Administration undertook an initial scan of relevant tax exemption policies across Canada, which resulted in identification of ten municipal policies and one provincial policy. Key findings included:

- all programs and policies scanned are application based, in most cases requiring annual submission of application or renewal documents;
- the period of tax exemption for approved properties can vary across programs and policies, typically on an annual basis, but also including five year and 25 year exemptions, and in New Brunswick once a property becomes exempt, no further applications are required;
- while housing providers and properties were eligible for application in all of the policies scanned, six out of the 10 municipal policies and the lone provincial policy also explicitly make tax exemption provisions for some forms of affordable and/ or supportive housing properties. These policies are found in Vancouver, Victoria, Saskatoon, Regina, Toronto, Halifax, and New Brunswick.

Attachment 1

- City Administration in Calgary is similarly exploring options to support affordable housing properties, but Calgary's administration confirms that they share Edmonton's interpretation of the legislation.



EXECUTIVE COMMITTEE REPORT

Leduc Annexation Area Assessment Potential Adjustments

THIS ITEM WAS REQUISITIONED TO CITY COUNCIL WITHOUT A COMMITTEE RECOMMENDATION

Administration Recommendation

That the February 16, 2022, Financial and Corporate Services report FCS00406, be received for information.

History

- At the February 16, 2022, Executive Committee meeting, Mayor A. Sohi and Councillor J. Rice requisitioned the February 16, 2022, Financial and Corporate Services report FCS00406 to City Council without a Committee recommendation.
- At the February 16, 2022, Executive Committee meeting, the February 16, 2022, Financial and Corporate Services report FCS00406 was considered.
- The Committee heard from A. Thomas.

Attachment

February 16, 2022, Financial and Corporate Services report FCS00406

LEDUC ANNEXATION AREA ASSESSMENT POTENTIAL ADJUSTMENTS

RECOMMENDATION

That the February 16, 2022, Financial and Corporate Services report FCS00406, be received for information.

Report Purpose

Information Only

Council is being informed of the considerations to approve forgiveness of taxes and penalties in relation to its previous direction about properties annexed from Leduc County. A Council motion is required for the tax forgiveness outlined in this report to proceed.

Previous Council/Committee Action

At the February 8, 2021 City Council meeting, the following motion passed:

That Administration provide a report to Committee, in the first quarter of each of the next two years, outlining the taxes and any penalties that would be required to be cancelled under Section 347 of the *Municipal Government Act*, to accomplish the cancellation that is contemplated in Option 3, as outlined in the February 1, 2021, Financial and Corporate Services report FCS00021rev, for any residential properties in the annexed area that had an increase in taxes in 2020, in accordance with Option 3, as outlined in the February 1, 2021, Financial and Corporate Services report FCS00021rev.

Executive Summary

- Administration was directed to report to committee on the taxes and penalties that would need to be cancelled to achieve a property tax phase-in approach for residential property owners in the Leduc annexed area that experienced 2020 tax increases.
- The cost to adjust the property taxes in accordance with Council's motion would be \$52,119.78.

Leduc Annexation Area Assessment Potential Adjustments

REPORT

On January 1, 2019, two areas of land from Leduc County and the Town of Beaumont became part of Edmonton through an annexation agreement. Under the agreement, the properties in the annexed area are annually taxed for the next 50 years at the lowest rate set by either the City of Edmonton or their former municipality. In 2020, a number of residents in the Leduc County annexed area raised concerns about tax increases, which were primarily due to property assessment changes related to either market analysis or data corrections (such as building improvements previously not on file). Annual changes to property values are a normal part of the assessment process, but the difference in value upon reassessment was more significant for some properties.

At the February 8, 2021, City Council meeting Council moved four motions regarding the Leduc County annexed properties. Administration addressed two motions at the May 3, 2021, City Council meeting (Financial and Corporate Services report FCS00470, Leduc Annexed Residential Properties): one cancelling penalties and tax arrears for 2020, and the other deferring the payment of taxes until the end of 2021 (Financial and Corporate Services report FCS00404, Bylaw 19640 - Amendments to Bylaw 19394 - Leduc Annexation Area Change Tax Due Date) effectively removing the five per cent monthly penalties applied in July, September and November and eliminating tax arrears penalties). A third motion was recently addressed at the November 22, 2021, City Council meeting (Financial and Corporate Services report FCS00405, Leduc Annexation Area Tax Penalty Cancellation and Adjustments for 2020) providing a prorated tax rebate for the 2020 tax year for any property owner that successfully reduced their assessment at the Assessment Review Board (ARB) in 2021 (based on the difference between the 2021 revised assessment and the 2020 assessment).

The fourth motion would retroactively reduce previously applied taxes in 2020 and 2021. Under this motion, property owners that experienced a 2020 tax increase would retroactively have their 2020 tax increase reduced by 75 per cent and their 2021 tax increase reduced by 50 per cent using 2019 as a baseline year. Both of these retroactive rebates would be applied as tax credits in advance of sending the 2022 tax notices. Administration will present a subsequent report in Q1 2023 with the option to reduce the 2022 tax increase by 25 per cent using 2019 as a baseline year.

If Council wishes to proceed with this reduction, 77 of the 204 total residential properties in the annexed area will receive tax rebates as outlined in Attachment 1. As per Council's motion, a second report in early 2023 will outline the potential 2022 credit.

Budget/Financial Implications

The total amount of taxes to be cancelled for 2020 and 2021 would be \$52,119.78. These credits would be funded from a reserve fund maintained for prior year property tax adjustments.

COMMUNITY INSIGHT

At the October 26, 2020, Executive Committee meeting, Committee heard from a number of annexation area residents who expressed frustration with their property tax increases. These

Leduc Annexation Area Assessment Potential Adjustments

residents explained that their understanding was that taxes would remain at pre-annexation levels and that wording within the annexation order suggested that Edmonton should assess properties “on the same basis as if they were in Leduc County.” Administration heard these frustrations and clarified that the assessment methodology is provincially legislated and is the same for both municipalities; the tax increases were primarily due to property assessment value changes related to either market analysis or data corrections once the City assumed responsibility for their assessments. Administration will continue to listen to and work with these new residents as the area proceeds through the transition period.

GBA+

The GBA+ considerations of this report, as with nearly all property tax policy matters, relate to the individuals who own property. As a practice, property taxation is neutral to any individual’s gender, race, ethnicity, religion, age or disability, in that the amount of taxes paid is based solely on a property’s value. It is considered a best practice for assessment and taxation that owners of similarly built and valued properties in a municipality pay a similar amount of property taxes each year. Administration does not have the ability to know if the demographic characteristics of the impacted annexed property owners differ from the demographic characteristics of Edmonton’s population.

ATTACHMENT

1. Leduc Annexation Area Residential Property Tax Cancellations for 2020 and 2021

Leduc Annexation Area Residential Property Tax Cancellations for 2020 and 2021

	ACCOUNT	2019 TAX LEVY	2020 TAX LEVY	2020 TAX REBATE	2021 TAX LEVY	2021 TAX REBATE
1	10884248	\$2,847.65	\$3,227.22	\$284.68	\$3,228.36	\$190.36
2	10884516	\$1,465.93	\$1,730.47	\$198.41	\$1,688.39	\$111.23
3	10884520	\$847.02	\$1,477.20	\$472.64	\$1,045.66	\$99.32
4	10884521	\$1,406.08	\$1,686.48	\$210.30	\$1,655.72	\$124.82
5	10884525	\$812.39	\$1,379.30	\$425.18	\$1,355.30	\$271.46
6	10884528	\$873.35	\$1,422.87	\$412.14	\$1,394.46	\$260.56
7	10884597	\$2,057.91	\$2,099.21	\$30.98	\$2,052.16	\$0.00
8	10884598	\$2,262.79	\$2,494.92	\$174.10	\$2,266.70	\$1.95
9	10884602	\$1,795.99	\$2,070.00	\$205.51	\$2,006.62	\$105.32
10	10884610	\$1,888.57	\$2,112.87	\$168.23	\$2,068.14	\$89.79
11	10884615	\$1,696.76	\$2,134.13	\$328.03	\$2,092.97	\$198.11
12	10884621	\$1,819.33	\$2,239.35	\$315.02	\$2,186.32	\$183.50
13	10884759	\$3,326.52	\$3,798.32	\$353.85	\$3,706.91	\$190.20
14	10884760	\$2,485.58	\$3,315.28	\$622.28	\$3,238.22	\$376.32
15	10884761	\$1,927.20	\$2,514.11	\$440.18	\$1,852.11	\$0.00
16	10884763	\$1,967.16	\$2,714.14	\$560.24	\$2,652.65	\$342.75
17	10884764	\$1,307.21	\$2,973.93	\$1,250.04	\$4,541.43	\$1,617.11
18	10884766	\$2,140.80	\$3,596.42	\$1,091.72	\$3,509.73	\$684.47
19	10884770	\$2,124.90	\$2,716.69	\$443.84	\$2,653.87	\$264.49
20	10884771	\$1,698.61	\$2,392.84	\$520.67	\$2,339.46	\$320.43
21	10884773	\$1,328.34	\$2,259.05	\$698.03	\$2,215.40	\$443.53
22	10884774	\$2,288.86	\$2,804.14	\$386.46	\$2,743.86	\$227.50
23	10884776	\$2,254.46	\$4,796.22	\$1,906.32	\$4,688.77	\$1,217.16
24	10884777	\$1,778.64	\$3,283.73	\$1,128.82	\$3,707.88	\$964.62
25	10884778	\$2,554.09	\$5,154.79	\$1,950.53	\$6,038.64	\$1,742.28
26	10884779	\$2,048.28	\$3,017.20	\$726.69	\$2,948.02	\$449.87
27	10884780	\$2,392.29	\$2,494.27	\$76.49	\$2,870.86	\$239.29
28	10884781	\$2,723.19	\$4,720.01	\$1,497.62	\$3,241.33	\$259.07
29	10884800	\$2,707.97	\$3,365.19	\$492.92	\$4,912.86	\$1,102.45
30	10884802	\$3,049.62	\$3,483.09	\$325.10	\$3,417.60	\$183.99
31	10884804	\$2,401.49	\$2,929.78	\$396.22	\$2,377.18	\$0.00
32	10884805	\$2,264.60	\$2,425.62	\$120.77	\$2,014.26	\$0.00
33	10884827	\$1,389.09	\$1,642.59	\$190.13	\$2,036.56	\$323.74
34	10884829	\$1,639.63	\$2,416.70	\$582.80	\$2,361.15	\$360.76
35	10884832	\$2,976.19	\$3,244.29	\$201.08	\$3,195.21	\$109.51
36	10884833	\$1,433.79	\$2,916.39	\$1,111.95	\$3,113.22	\$839.72
37	10884836	\$1,367.63	\$2,161.45	\$595.37	\$2,114.39	\$373.38
38	10884887	\$1,297.41	\$1,650.03	\$264.47	\$1,589.97	\$146.28
39	10884888	\$2,312.49	\$2,415.21	\$77.04	\$2,380.03	\$33.77
40	10884889	\$1,641.91	\$2,027.32	\$289.06	\$1,977.55	\$167.82
41	10884892	\$2,104.52	\$2,182.22	\$58.27	\$2,134.53	\$15.01
42	10884896	\$1,037.62	\$1,593.98	\$417.27	\$1,567.51	\$264.95
43	10884907	\$2,063.15	\$2,374.99	\$233.88	\$2,445.74	\$191.30
44	10884912	\$1,842.13	\$2,078.65	\$177.39	\$2,020.09	\$88.98
45	10884916	\$2,620.44	\$2,839.06	\$163.97	\$2,770.29	\$74.93
46	10884917	\$1,389.78	\$1,643.89	\$190.58	\$1,605.08	\$107.65
47	10884919	\$2,271.61	\$2,636.56	\$273.71	\$2,593.30	\$160.85

Attachment 1

	ACCOUNT	2019 TAX LEVY	2020 TAX LEVY	2020 TAX REBATE	2021 TAX LEVY	2021 TAX REBATE
48	10884950	\$1,087.14	\$1,323.57	\$177.32	\$1,297.14	\$105.00
49	10884954	\$1,552.78	\$1,569.91	\$12.85	\$1,535.82	\$0.00
50	10884965	\$736.84	\$928.01	\$143.38	\$909.48	\$86.32
51	10884968	\$1,516.77	\$1,991.24	\$355.85	\$1,629.36	\$56.30
52	10884969	\$1,602.72	\$2,018.13	\$311.56	\$1,548.73	\$0.00
53	10884983	\$1,218.01	\$1,241.90	\$17.92	\$1,213.33	\$0.00
54	10885020	\$3,575.61	\$4,363.81	\$591.15	\$4,262.53	\$343.46
55	10885021	\$3,744.66	\$3,991.48	\$185.12	\$1,877.24	\$0.00
56	10885024	\$2,131.09	\$2,644.24	\$384.86	\$2,584.14	\$226.53
57	10885025	\$1,942.72	\$2,569.49	\$470.08	\$2,513.89	\$285.59
58	10885029	\$2,017.45	\$2,541.44	\$392.99	\$2,495.47	\$239.01
59	10885031	\$138.58	\$218.61	\$60.02	\$214.25	\$37.84
60	10885032	\$1,271.55	\$2,321.72	\$787.63	\$1,794.00	\$261.23
61	10885034	\$2,124.90	\$3,251.58	\$845.01	\$2,698.15	\$286.63
62	10885037	\$3,481.33	\$3,866.63	\$288.98	\$3,300.91	\$0.00
63	10885045	\$5,111.03	\$5,280.36	\$127.00	\$5,174.91	\$31.94
64	10885063	\$2,366.00	\$2,505.93	\$104.95	\$2,186.25	\$0.00
65	10885102	\$1,194.94	\$1,384.58	\$142.23	\$1,352.64	\$78.85
66	10885104	\$1,278.58	\$1,317.54	\$29.22	\$1,286.94	\$4.18
67	10885114	\$1,259.54	\$1,335.13	\$56.69	\$1,304.31	\$22.39
68	10885120	\$1,428.70	\$1,430.12	\$1.06	\$1,404.30	\$0.00
69	10885159	\$1,169.98	\$1,224.23	\$40.69	\$1,183.66	\$6.84
70	10885182	\$3,008.20	\$3,071.06	\$47.15	\$2,890.22	\$0.00
71	10925887	\$1,984.70	\$2,989.00	\$753.23	\$3,159.97	\$587.64
72	10925888	\$1,985.41	\$2,357.03	\$278.72	\$2,307.39	\$160.99
73	10925889	\$1,234.39	\$2,158.49	\$693.08	\$2,113.95	\$439.78
74	10925917	\$3,123.59	\$3,247.55	\$92.97	\$5,375.11	\$1,125.76
75	10931837	\$1,456.50	\$1,836.84	\$285.26	\$1,902.73	\$223.12
76	10931838	\$1,133.11	\$1,827.06	\$520.46	\$1,789.22	\$328.06
77	10931839	\$1,469.04	\$1,824.21	\$266.38	\$1,783.45	\$157.21
				\$31,504.67		\$20,615.11

**EXECUTIVE COMMITTEE REPORT****Affordable Housing Investment Program - Winter 2022 Grant Award Recommendation**

THIS ITEM WAS REQUISITIONED TO CITY COUNCIL WITHOUT A COMMITTEE RECOMMENDATION

Administration Recommendation

1. That a grant funding affordable housing agreement between the City of Edmonton and 12621665 Canada Association for an amount not to exceed \$5,591,706, as outlined in Attachment 2 of the February 16, 2022, Community Services report CS00897, be approved, and that the agreement be in form and content acceptable to the City Manager.
2. That a grant funding affordable housing agreement between the City of Edmonton and 102039004 Saskatchewan Ltd. for an amount not to exceed \$2,556,502, as outlined in Attachment 4 of the February 16, 2022, Community Services report CS00897, be approved, and that the agreement be in form and content acceptable to the City Manager.
3. That a grant funding affordable housing agreement between the City of Edmonton and 102039004 Saskatchewan Ltd. for an amount not to exceed \$2,060,668, as outlined in Attachment 6 of the February 16, 2022, Community Services report CS00897, be approved, and that the agreement be in form and content acceptable to the City Manager.
4. That a grant funding affordable housing agreement between the City of Edmonton and Matheson Seniors Housing Corp. for an amount not to exceed \$954,350, as outlined in Attachment 8 of the February 16, 2022, Community Services report CS00897, be approved, and that the agreement be in form and content acceptable to the City Manager.
5. That a grant funding affordable housing agreement between the City of Edmonton and The Mustard Seed Foundation for an amount not to exceed \$2,555,313, as outlined in Attachment 10 of the February 16, 2022, Community Services report CS00897, be approved, and that the agreement be in form and content acceptable to the City Manager.
6. That a grant funding affordable housing agreement between the City of Edmonton and Westrich Garneau Inc. for an amount not to exceed \$3,050,000, as outlined in Attachment 12 of the February 16, 2022, Community Services report CS00897, be approved, and that the agreement be in form and content acceptable to the City Manager.

History

- At the February 16, 2022, Executive Committee meeting, Mayor A. Sohi and Councillor J. Rice requisitioned the February 16, 2022, Community Services report CS00897 to City Council without a Committee recommendation.

- At the February 16, 2022, Executive Committee meeting, Councillor A. Knack moved the following motion that was not put to vote:
 1. That a grant funding affordable housing agreement between the City of Edmonton and 12621665 Canada Association for an amount not to exceed \$5,591,706, as outlined in Attachment 2 of the February 16, 2022, Community Services report CS00897, be approved, and that the agreement be in form and content acceptable to the City Manager.
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 6. That a grant funding affordable housing agreement between the City of Edmonton and Westrich Garneau Inc. for an amount not to exceed \$3,050,000, as outlined in Attachment 12 of the February 16, 2022, Community Services report CS00897, be approved, and that the agreement be in form and content acceptable to the City Manager.
- At the February 16, 2022, Executive Committee meeting, the February 16, 2022, Community Services report CS00897 was considered.

Attachment

February 16, 2022, Community Services report CS00897

Affordable Housing Investment Program - Winter 2022 Grant Award Recommendation

RECOMMENDATION

1. That a grant funding affordable housing agreement between the City of Edmonton and 12621665 Canada Association for an amount not to exceed \$5,591,706, as outlined in Attachment 2 of the February 16, 2022, Community Services report CS00897, be approved, and that the agreement be in form and content acceptable to the City Manager.
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6. That a grant funding affordable housing agreement between the City of Edmonton and Westrich Garneau Inc. for an amount not to exceed \$3,050,000, as outlined in Attachment 12 of the February 16, 2022, Community Services report CS00897, be approved, and that the agreement be in form and content acceptable to the City Manager.

Affordable Housing Investment Program - Winter 2022 Grant Award Recommendation

Report Purpose

Committee decision required

Committee is being asked to approve Affordable Housing Investment Program grant recommendations for a total of \$16,768,539, in accordance with City Policy C601 - Affordable Housing Investment Guidelines.

Executive Summary

- The Affordable Housing Investment Program provides grant funding to incentivize affordable housing development and help the City reach its goal of creating 2,500 affordable housing units across Edmonton between 2019 and 2022.
- Administration recommends grant funding for six proposed affordable housing developments which would result in 265 new units and 300 rehabilitated units of affordable housing in exchange for grant funding in the amount of \$16.7 million. All units included in this round would be offered to qualified tenants at a maximum of 80 per cent of average market rent.
- Funding is available through the existing City's Affordable Housing Reserve.
- The City's funding investment would help generate a total of \$154.9 million in construction value and would contribute to the long-term supply of affordable housing in Edmonton.
- The proposed developments would provide safe, affordable and sustainably-built housing for Indigenous peoples, low income seniors, women and children, people with disabilities and people experiencing homelessness.
- The proposals represent unique collaborations with a diverse group of non-market and market housing providers whose proposed designs thoughtfully respond to the needs of future residents.

REPORT

The City's Updated Affordable Housing Investment Plan (2019-2022) aims to create 2,500 new or renovated affordable housing units across Edmonton. In alignment with City Policy C601 - Affordable Housing Investment Guidelines, the Affordable Housing Investment Program provides grant funding to eligible non-profit and private sector entities, targeting shovel-ready proposals to encourage affordable housing development in Edmonton. The grants provide up to 25 per cent of the capital costs of newly constructed or rehabilitated affordable housing developments. All projects exceed the National Energy Code by a minimum of 15 per cent which enhances the developments' environmental and long-term operational sustainability.

The latest grant intake period ran from June 28 to September 30, 2021. Administration updated its Affordable Housing Investment Program website and sent out a news release at

Affordable Housing Investment Program - Winter 2022 Grant Award Recommendation

the beginning of the grant intake period to indicate that applications were being accepted. Administration reviews all applications and works with applicants not selected for funding to improve the quality of their applications and encourages them to submit for future rounds of intake

The six applications recommended for funding would provide people from all backgrounds the opportunity to live in an affordable home. The application review process prioritized the affordability of a project, as well as the people it was looking to serve by focusing on marginalized groups. By supporting these applications, the program aims to help reduce barriers to housing equity in our city.

The six recommended projects would add 265 new affordable housing units and 300 rehabilitated affordable housing units, with a total of 2,304 affordable housing units as of First Quarter 2022. This moves the City towards its goal of 2,500 units of new or renovated affordable housing by the end of 2022 as outlined in the City's Updated Affordable Housing Investment Plan. The six applications represent a total investment of approximately \$155 million.

12621665 Canada Association - Heritage Valley Towne Centre Area

The newly formed non-profit corporation, 12621165 Canada Association is collaborating with Enoch Cree Nation and Leston Holdings (1980) Ltd. to create affordable rental units in Heritage Valley Towne Centre for members of Enoch Cree Nation and qualifying tenants referred by Catholic Social Services and Homeward Trust. 12621165 Canada Association is currently constructing the apartment building which would provide a total of 102 units for affordable use for 20 years. Once complete, the property will be managed and operated by Leston. Leston has more than 3,000 units under its management, purchased and/or renovated for the past 10 years. 12621165 Canada Association would offer all units at a maximum of 80 per cent of average market rents and provide the following unit types:

- 43 two-bedroom, two-bathroom units
- 59 two-bedroom, one-bathroom units

The estimated construction budget for the entire development is approximately \$25 million. 12621165 Canada Association has applied for \$5,591,706 from the City to offset capital costs for the 102 units. As 12621165 Canada Association was recently incorporated in Alberta, Administration would also obtain a guarantee agreement from a third-party corporate entity that satisfies the City's program and due diligence requirements, with recourse in the event of default by 12621165 Canada Association.

Attachment 1 contains further details of this development. Attachment 2 contains the proposed general terms and conditions of the grant funding affordable housing agreement.

Affordable Housing Investment Program - Winter 2022 Grant Award Recommendation

102039004 Saskatchewan Ltd. - Chappelle

102039004 Saskatchewan Ltd. is collaborating with YWCA Edmonton to provide family-sized rentals for women and children escaping domestic abuse and people experiencing homelessness. 102039004 Saskatchewan Ltd. is proposing to develop 15 buildings with a total of 134 units. 102039004 Saskatchewan Ltd. would make 43 of the units affordable for 25 years, with:

- 10 one-bedroom units at a maximum of 67 per cent of average market rents
- 33 three-bedroom units at a maximum of 66 per cent of average market rents

The estimated construction budget for the entire development is approximately \$36 million. 102039004 Saskatchewan Ltd. has applied for \$2,556,502 from the City to offset capital costs for the 43 affordable units..

Attachment 3 contains further details of this development. Attachment 4 contains the proposed general terms and conditions of the grant funding affordable housing agreement.

102039004 Saskatchewan Ltd. - The Orchards at Ellerslie

102039004 Saskatchewan Ltd. is collaborating with YWCA Edmonton to provide family-sized rentals for women and children escaping domestic abuse and people experiencing homelessness. 102039004 Saskatchewan Ltd. is proposing to develop eight buildings with a total of 111 units. Avana would make 34 of the units affordable for 25 years at a maximum of 80 per cent of average market rents. The unit types would range from one-bedroom units to three-bedroom units.

The estimated construction budget for the entire development is approximately \$29.8 million. 102039004 Saskatchewan Ltd. has applied for \$2,060,668 from the City to offset capital costs for the 34 affordable units..

Attachment 5 contains further details of this development. Attachment 6 contains the proposed general terms and conditions of the grant funding affordable housing agreement.

Matheson Seniors Housing Corp. - Woodcroft

Matheson Seniors Housing Corp. has owned and operated the Matheson Seniors' Residence since 1973, with the residence providing a mix of 411 studio and one-bedroom affordable housing units to low income seniors.

The residence building is currently being rehabilitated to extend its service life for another fifty years. As part of this rehabilitation, Matheson is replacing the original plumbing in each residential unit, which are all affordable units for low income seniors. A relocation plan is in place to temporarily relocate residents from their units during the rehabilitation project. In exchange for the City of Edmonton grant funding contribution, Matheson is committed to offer eligible seniors rents at a maximum of 80 per cent of average market rents for 20 years

Affordable Housing Investment Program - Winter 2022 Grant Award Recommendation

for 300 of the 411 total units. The remaining units will be offered at various rates below average market rents.

The estimated budget for the rehabilitation work is \$5.2 million and Matheson has applied for \$954,350 from the City to offset capital costs for the rehabilitation work.

Attachment 7 contains further details of this development. Attachment 8 contains the proposed general terms and conditions of the grant funding affordable housing agreement.

The Mustard Seed Foundation - Canora

The Mustard Seed Foundation's proposed development focuses on providing permanent supportive housing to low-income adults experiencing chronic homelessness or housing instability. The proposed development consists of 38 self-contained studio units, including ten units dedicated to Indigenous peoples. The proposed development would provide wrap-around support designed to promote and foster wellness and sustainable living by engaging and empowering residents to access services that best meet their needs. This model provides an integrated approach with principal focus on building meaningful relationships with other residents, staff, and community members, as well as the neighbourhood as a whole. All units would be offered at 70 to 80 per cent of average market rents, with affordable use for 30 years.

The addition of 38 supportive housing units through this proposed development would also help achieve the City's goal of constructing 900 supportive housing units by 2024 as identified in the Updated Plan to End Homelessness.

The estimated budget for the entire development is approximately \$11 million. The Mustard Seed Foundation has applied for \$2,555,313 from the City to offset capital costs for the 38 supportive housing units.

Attachment 9 contains further details of this development. Attachment 10 contains the proposed general terms and conditions of the grant funding affordable housing agreement.

Westrich Garneau Inc. - Garneau

Westrich Garneau Inc. is constructing the six-storey West Garneau apartments. The development will include 159 residential units, 48 of which would be affordable housing at a maximum of 80 per cent of average market rents, with affordable use for 20 years. The 48 units would comprise a mix of one-, two- and three-bedroom units. The affordable units would be available to eligible tenants, with a focus on single parents, seniors, new immigrants and members of Enoch Cree Nation.

The estimated construction budget for the entire development is approximately \$47.8 million. Westrich Garneau Inc. has applied for \$3,050,000 from the City to offset capital costs for the 48 affordable units. As Westrich Garneau Inc. was recently incorporated,, Administration would also obtain a guarantee agreement from a third-party corporate entity that satisfies the

Affordable Housing Investment Program - Winter 2022 Grant Award Recommendation

City's program and due diligence requirements, with recourse in the event of default by Westrich Garneau Inc.

Attachment 11 contains further details of this development. Attachment 12 contains the proposed general terms and conditions of the grant funding affordable housing agreement.

Budget/Financial Implications

The requested City contributions of up to \$16,768,539 would be provided through the Affordable Housing Investment Program funded from the existing City's Affordable Housing Reserve and tax levy budget.

Legal Implications

Bylaw 16620 - City Administration Bylaw enables the City Manager to approve affordable housing agreements that do not exceed \$1,000,000. Committee approval is required for affordable housing agreements that exceed these delegated authority limits.

COMMUNITY INSIGHT

All residents of Edmonton deserve a place to call home and housing security is critical to a healthy city. Residents have informed the City through previous public engagement that there is not enough affordable housing supply in the city, as many struggle finding an affordable home. Providing grant funding for six affordable housing developments through the Affordable Housing Investment Program would help people find housing by increasing the affordable housing supply.

GBA+

The Affordable Housing Investment Program provides people from all backgrounds with the opportunity to live in a safe, comfortable home that they can afford. For many, a major barrier to this is cost. The program aims to remove that barrier through supporting the development of affordable housing in Edmonton and impacts those seeking affordable housing as it increases the supply of such housing units in Edmonton.

To ensure projects submitted for grant funding provide the greatest level of affordability, the application review process weighted affordability measures, such as the number of affordable units, average rent, and length of affordability, higher than other application criteria. Ensuring that affordability is the most important aspect of the applications is the one of the central equity measures utilized in the review process.

In addition to affordability, the review criteria incentivizes applications that focus on providing units to marginalized groups, such as Indigenous peoples, low income seniors, women fleeing violence, people with disabilities and people experiencing homelessness. Providing the greatest level of affordability possible while focusing units to marginalized groups are the main ways in

Affordable Housing Investment Program - Winter 2022 Grant Award Recommendation

which to ensure the Affordable Housing Investment Program is removing barriers to housing and supporting housing equality.

ATTACHMENTS

1. 12621665 Canada Association Heritage Valley Development Overview
2. 12621665 Canada Association Heritage Valley Grant Funding Affordable Housing Agreement General Terms and Conditions
3. 102039004 Saskatchewan Ltd. Chappelle Development Overview
4. 102039004 Saskatchewan Ltd. Chappelle Grant Funding Affordable Housing Agreement General Terms and Conditions
5. 102039004 Saskatchewan Ltd. Orchards Development Overview
6. 102039004 Saskatchewan Ltd. Orchards Grant Funding Affordable Housing Agreement General Terms and Conditions
7. Matheson Seniors Housing Corp. Matheson Seniors' Residence Development Overview
8. Matheson Seniors Housing Corp. Matheson Seniors' Residence Grant Funding Affordable Housing Agreement General Terms and Conditions
9. The Mustard Seed Foundation Canora Development Overview
10. The Mustard Seed Foundation Canora Grant Funding Affordable Housing Agreement General Terms and Conditions
11. Westrich Garneau Inc. Development Overview
12. Westrich Garneau Inc. Grant Funding Affordable Housing Agreement General Terms and Conditions

12621665 Canada Association Heritage Valley Development Overview

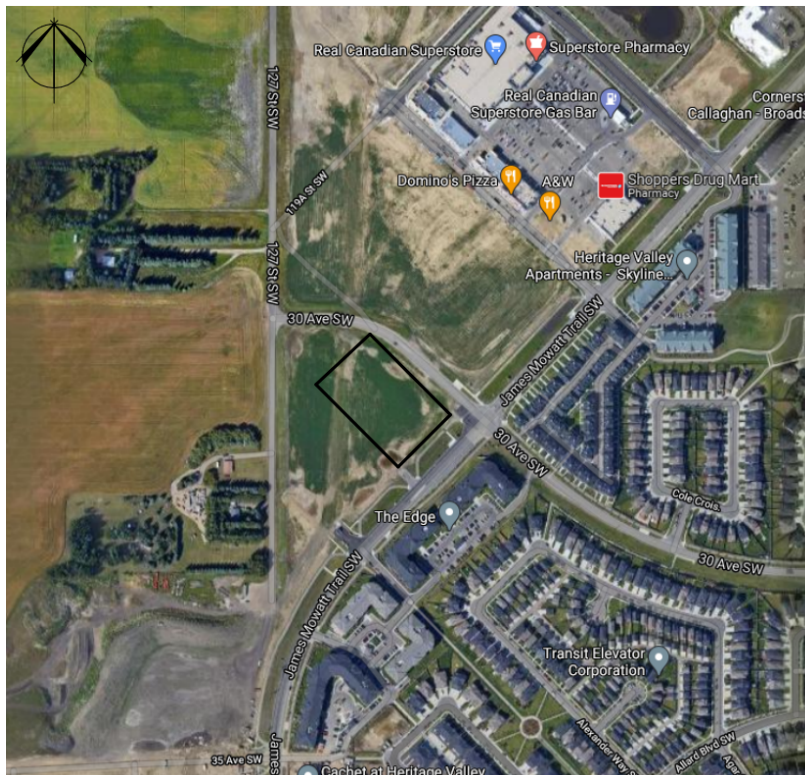
The affordable housing development by 12621665 Canada Association is located at 11805 30 Avenue SW on an 1.2 hectare multi-family lot in Heritage Valley Town Centre Area, which has zero per cent non-market affordable housing as per the City's Non-Market Housing Inventory. The development is currently under construction and is expected to be ready for occupancy at the end of 2022.

The land is zoned Medium Rise Apartment Zone (RA8), which permits the proposed development.

The development will provide affordable rental units for Enoch Cree Nation members and also referrals from Catholic Social Services and Homeward Trust and will feature 102 affordable housing units. The units will be affordable for a minimum of 20 years at 80 per cent or less of average market rents. The following unit types will be provided:

- 43 two-bedroom, two-bathroom units
- 59 two-bedroom, one-bathroom units

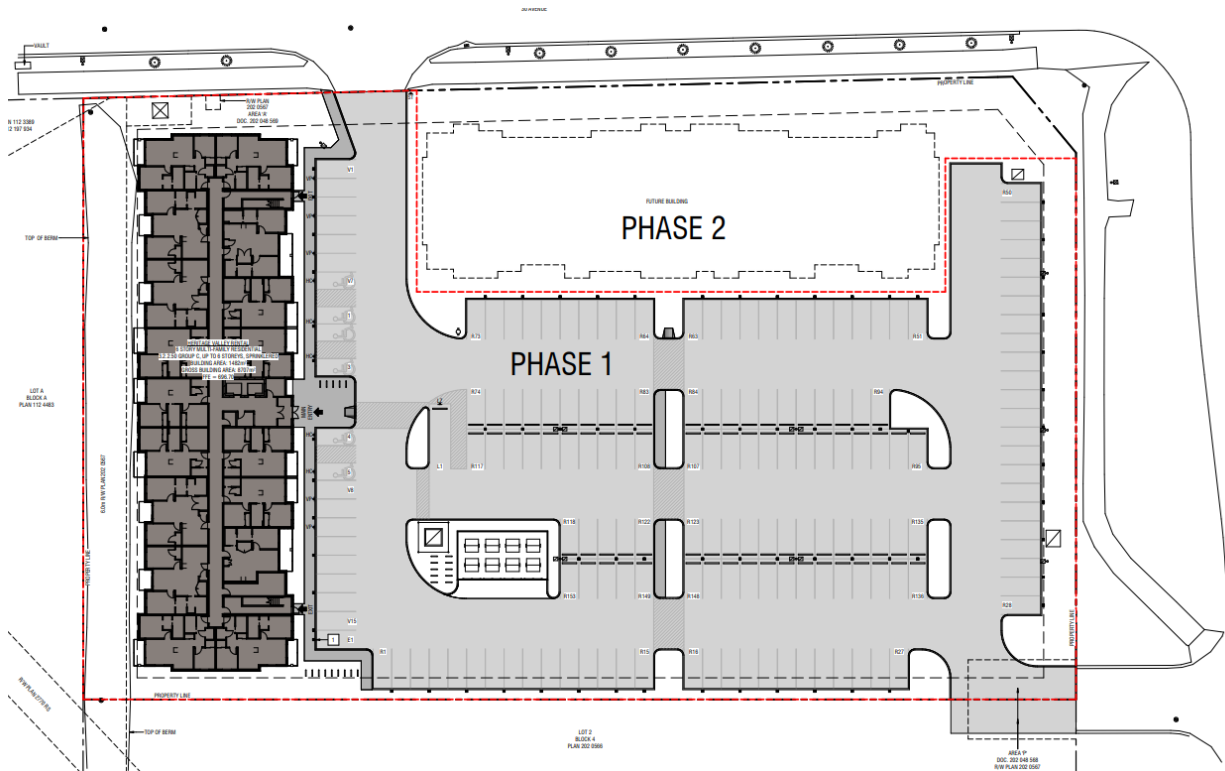
Location



Rendering



Site Plan



The development is situated within walking distance to all daily needs, such as grocery stores, pharmacies, and the Edmonton Public Library. The future Heritage Valley Towne Centre Station of the Capital Line LRT south extension will be within walking distance of the site as well. Enoch Cree Nation will offer off-site programs for its members living in the building.

The development will achieve a 26 per cent decrease in operating energy consumption and greenhouse gas emissions relative to the National Energy Code for Buildings.

The development meets minimum accessibility requirements of the National Building Code 2019 Alberta Edition and 20 per cent of the units will be fully accessible.

12621665 Canada Association Heritage Valley Grant Funding Affordable Housing Agreement General Terms and Conditions

- The parties to the Agreement are the City of Edmonton and 12621665 Canada Association.
- The City will provide funding up to the maximum amount of \$5,591,706 to 12621665 Canada Association, to be paid out on a multi-year basis over a time period starting in 2022, as generally and non-exhaustively described as follows:
 - 100 per cent on execution of the agreement, condition removal, satisfactory production of quantity surveyor certificate confirming physical construction of the development is complete and final capital costs, copies of occupancy permits, and maintenance schedule.
- The funding is to be used towards the capital costs of constructing 102 new affordable housing units in the development located at 11805 30 Avenue SW in the Heritage Valley Towne Centre neighbourhood.
- The term of the grant funding affordable housing agreement expires 20 years from the date of issuance of occupancy permit for the last affordable housing unit in the development.
- Substantial completion of the development must occur within two years of the execution of the Agreement.
- Prospective occupants of the affordable housing units must qualify as eligible occupants under criteria established or approved by the City.
- The City is entitled to register a caveat or other instruments on title to protect its interest under the Agreement.
- In the event of a substantial breach of the Agreement by 12621665 Canada Association, remedies may include but are not limited to funding being repayable to the City on a prorated basis.

The grant funding affordable housing agreement, and any ancillary agreements thereto, shall be in a form acceptable to Legal Services, and in content acceptable to the Branch Manager of Social Development. The approval of the grant funding affordable housing agreement includes the approval of such corrective, conformance, and incidental amendments to the Terms and Conditions, and to the form and content, as necessary or desirable to give effect to or implement the funding transaction, all as may be subsequently approved by the Branch Manager of Social Development.

102039004 Saskatchewan Ltd. Chappelle Development Overview

The affordable housing development by 102039004 Saskatchewan Ltd. is located at 5275 Chappelle Road SW on a 1.7 hectare multi-family lot in the Chappelle neighbourhood, which has zero per cent non-market affordable housing as per the City's Non-Market Housing Inventory. 102039004 Saskatchewan Ltd. is proposing to develop 15 buildings with a total of 134 units.

The land is zoned Medium Rise Apartment Zone (RA8), which permits the proposed development and a major development permit for multi-unit housing was issued September 22, 2021. Building permits have been submitted to begin construction in early 2022.

The development will provide affordable rentals for vulnerable women and children and will feature 43 affordable housing units. The units will be affordable for a minimum of 25 years and the following types will be provided:

- 10 one-bedroom units at a maximum of 67 per cent of average market rents
- 33 three-bedroom units at a maximum of 66 per cent of average market rents

Location



The development will offer a playground, green space, walking paths, benches, ample bicycle parking, electric vehicle charging stations and more. The affordable units within the development will be offered to vulnerable women and children and people experiencing homelessness, including referrals accepted by YWCA Edmonton.

The affordable portion of the development will achieve a 15 per cent decrease in operating energy consumption and greenhouse gas emissions relative to the National Energy Code for Buildings.

The development meets minimum accessibility requirements of the National Building Code 2019 Alberta Edition. With a strong focus on women, children and families there are currently no additional accessibility measures implemented.

Renderings



Site Plan

The development will comprise 15 stacked townhouse buildings that will each contain between six and ten stacked units, with 11 buildings located around the

perimeter of the site, and with four buildings at the centre of the site. Surface parking will be adjacent to all buildings.

The buildings will feature 20 one bedroom, one bathroom units, 47 three bedroom, one and a half bathroom units and 67 three bedroom, two and a half bathroom units, for a total of 134 units.

The playground will be included at the centre of the site for resident and community use.



102039004 Saskatchewan Ltd. Chappelle Grant Funding Affordable Housing Agreement General Terms and Conditions

- The parties to the Agreement are the City of Edmonton and 102039004 Saskatchewan Ltd.
- The City will provide funding up to the maximum amount of \$2,556,502 to 102039004 Saskatchewan Ltd., to be paid out on a multi-year basis over the time period starting in 2022, as generally and non-exhaustively described as follows;
 - 30 per cent on execution of the Agreement and condition removal;
 - 30 per cent on satisfactory production of quantity surveyor certificate confirming physical construction of the development is at least 30 per cent complete, and production of satisfactory bond and insurance requirements;
 - 30 per cent on satisfactory production of quantity surveyor certificate confirming physical construction of the development is at least 60 per cent complete, and production of satisfactory bond and insurance requirements; and
 - 10 per cent on satisfactory production of quantity surveyor certificate confirming physical construction of development is complete and final capital costs, copies of occupancy permits, and maintenance schedule.
- The funding is to be used towards the capital costs of constructing 43 new affordable housing units in the development to be located at 5275 Chappelle Road SW in the Chappelle neighbourhood.
- The term of the grant funding affordable housing agreement expires 25 years from the date of issuance of occupancy permit for the last affordable housing unit in the development.
- Substantial completion of the development must occur within two years of the execution of the Agreement.
- Prospective occupants of the affordable housing units must qualify as eligible occupants under criteria established or approved by the City.
- The City is entitled to register a caveat or other instruments on title to protect its interest under the Agreement.

- In the event of a substantial breach of the Agreement by 102039004 Saskatchewan Ltd., remedies may include but are not limited to funding being repayable to the City on a prorated basis.

The grant funding affordable housing agreement shall be in a form acceptable to Legal Services, and in content acceptable to the Branch Manager of Social Development. The approval of the grant funding affordable housing agreement includes the approval of such corrective, conformance, and incidental amendments to the Terms and Conditions, and to the form and content, as necessary or desirable to give effect to or implement the funding transaction, all as may be subsequently approved by the Branch Manager of Social Development.

102039004 Saskatchewan Ltd. Orchards Development Overview

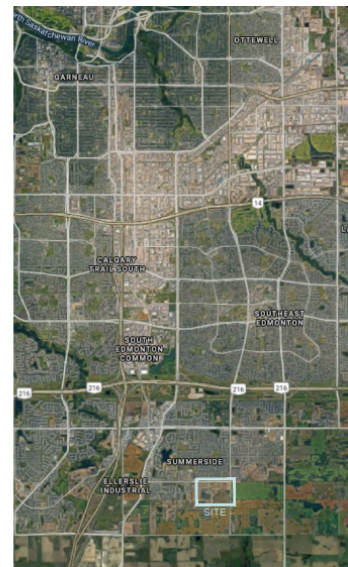
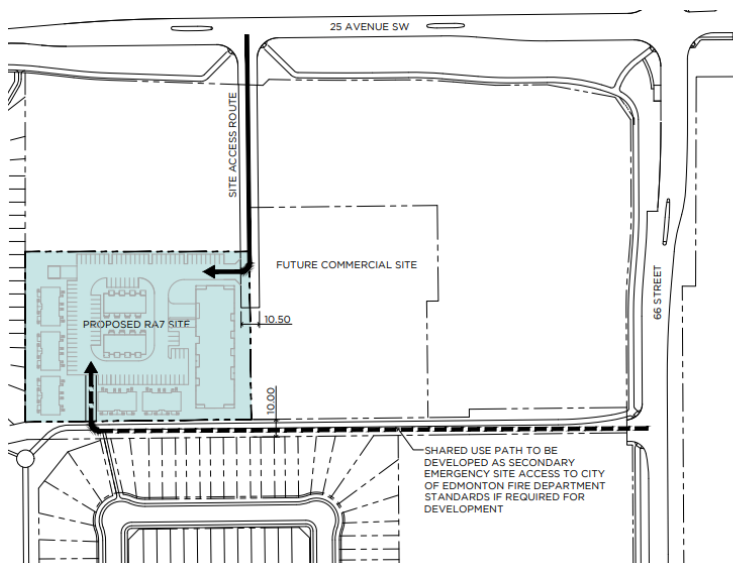
The affordable housing development by 102039004 Saskatchewan Ltd. is located at 6951 25 Avenue SW on a 1.2 hectare multi-family lot in The Orchards at Ellerslie neighbourhood, which has zero per cent non-market affordable housing as per the City's Non-Market Housing Inventory.

The land is zoned Low Rise Apartment Zone (RA7), which permits the proposed development.

102039004 Saskatchewan Ltd. is collaborating with YWCA Edmonton to provide family-sized rentals for women and children escaping domestic abuse and people experiencing homelessness. 102039004 Saskatchewan Ltd. is proposing to develop eight buildings with a total of 111 units. 102039004 Saskatchewan Ltd. will make 34 of the units affordable for a minimum of 25 years at a maximum of 80 per cent of average market rents. The unit types will range from one- to three-bedroom units.

The development is in the pre-construction phase and a development permit application has not yet been submitted. As such, the development details included here are subject to change. However, the appearance of the buildings will be similar to 102039004 Saskatchewan Ltd. development in Chappelle.

Location



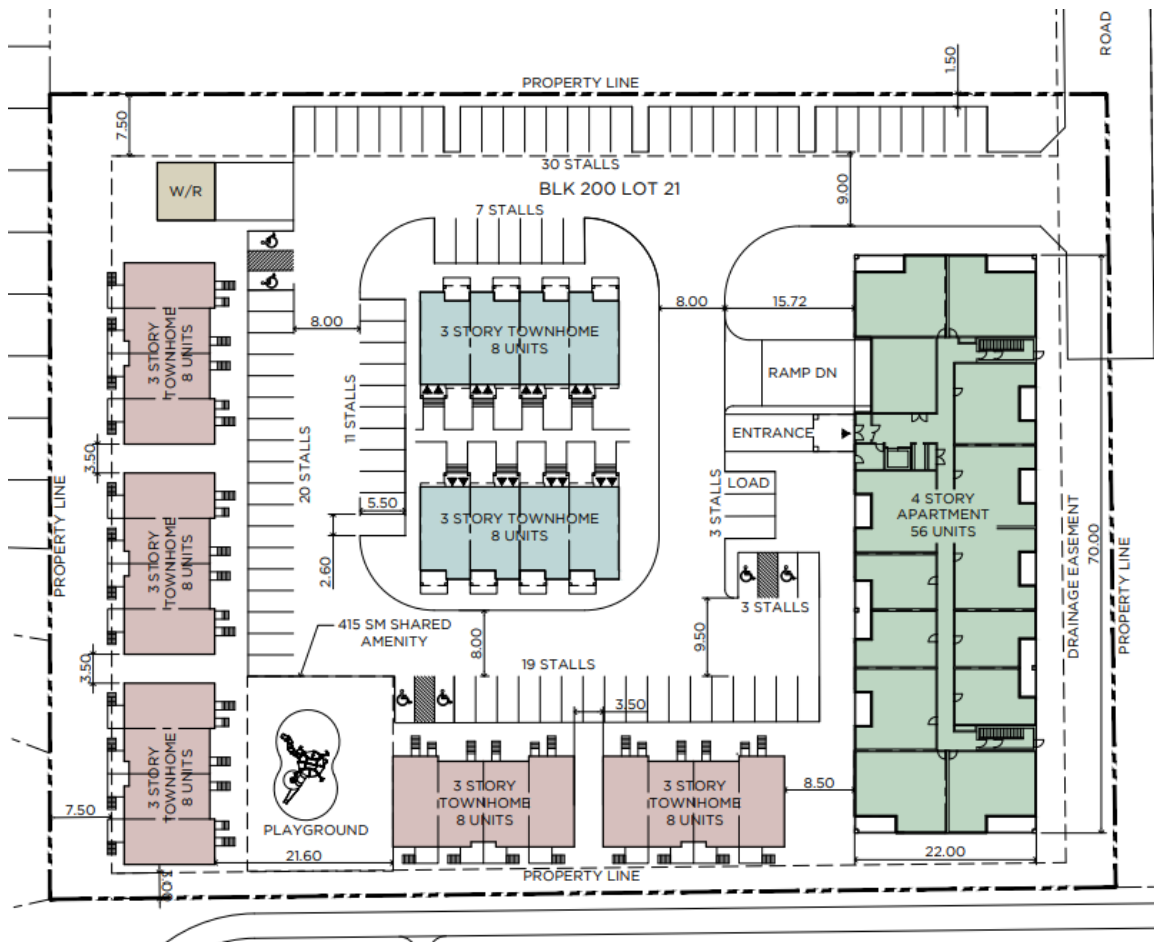
The development will offer a playground, green space, walking paths, benches, ample bicycle parking, electric vehicle charging stations and much more. The affordable units in the development will be offered to vulnerable women and

children and people experiencing homelessness, including referrals by YWCA Edmonton.

The affordable portion of the development will achieve a 15 per cent decrease in operating energy consumption and greenhouse gas emissions relative to the National Energy Code for Buildings.

The development meets minimum accessibility requirements of the National Building Code 2019 Alberta Edition. With a strong focus on women, children and families there are currently no additional accessibility measures implemented.

Site Plan



The development will comprise seven stacked townhouse buildings and a 4-storey apartment building. The stacked townhouses will be located on the west side of the site, with the apartment building located on the east side. Surface parking will be adjacent to the stacked townhouses and underground parking will be provided for the apartment building.

Attachment 5

The stacked townhouse buildings feature 10 one-bedroom, 18 two-bedroom and 28 three-bedroom units and the apartment building will feature 16 one-bedroom, 23 two-bedroom and 16 three-bedroom units, for a total of 111 units.

The playground will be included at the southwest corner of the site for resident and community use.

102039004 Saskatchewan Ltd. Orchards Grant Funding Affordable Housing Agreement General Terms and Conditions

- The parties to the Agreement are the City of Edmonton and 102039004 Saskatchewan Ltd.
- The City will provide funding up to the maximum amount of \$2,060,668 to 102039004 Saskatchewan Ltd., to be paid out on a multi-year basis over a time period starting in 2022, as generally and non-exhaustively described as follows;
 - 30 per cent on execution of the Agreement and condition removal;
 - 30 per cent on satisfactory production of quantity surveyor certificate confirming physical construction of the development is at least 30 per cent complete, and production of satisfactory bond and insurance requirements;
 - 30 per cent on satisfactory production of quantity surveyor certificate confirming physical construction of the development is at least 60 per cent complete, and production of satisfactory bond and insurance requirements; and
 - 10 per cent on satisfactory production of quantity surveyor certificate confirming physical construction of development is complete and final capital costs, copies of occupancy permits, and maintenance schedule.
- The funding is to be used towards the capital costs of constructing 34 new affordable housing units in the development to be located at 6951 25 Avenue SW in the Orchards at Ellerslie neighbourhood.
- The term of the grant funding affordable housing agreement expires 25 years from the date of issuance of occupancy permit for the last affordable housing unit in the development.
- Substantial completion of the development must occur within two years of the execution of the Agreement.
- Prospective occupants of the affordable housing units must qualify as eligible occupants under criteria established or approved by the City.
- The City is entitled to register a caveat or other instruments on title to protect its interest under the Agreement.

- In the event of a substantial breach of the Agreement by 102039004 Saskatchewan Ltd., remedies may include but are not limited to funding being repayable to the City on a prorated basis.

The grant funding affordable housing agreement shall be in a form acceptable to Legal Services, and in content acceptable to the Branch Manager of Social Development. The approval of the grant funding affordable housing agreement includes the approval of such corrective, conformance, and incidental amendments to the Terms and Conditions, and to the form and content, as necessary or desirable to give effect to or implement the funding transaction, all as may be subsequently approved by the Branch Manager of Social Development.

Matheson Seniors Housing Corp. Matheson Seniors' Residence Development Overview

The affordable housing rehabilitation project by Matheson Seniors Housing Corp. focuses on an existing concrete high rise apartment building at 11445 135 Street NW on a 0.7 hectare multi-family lot in the Woodcroft neighbourhood.

Location



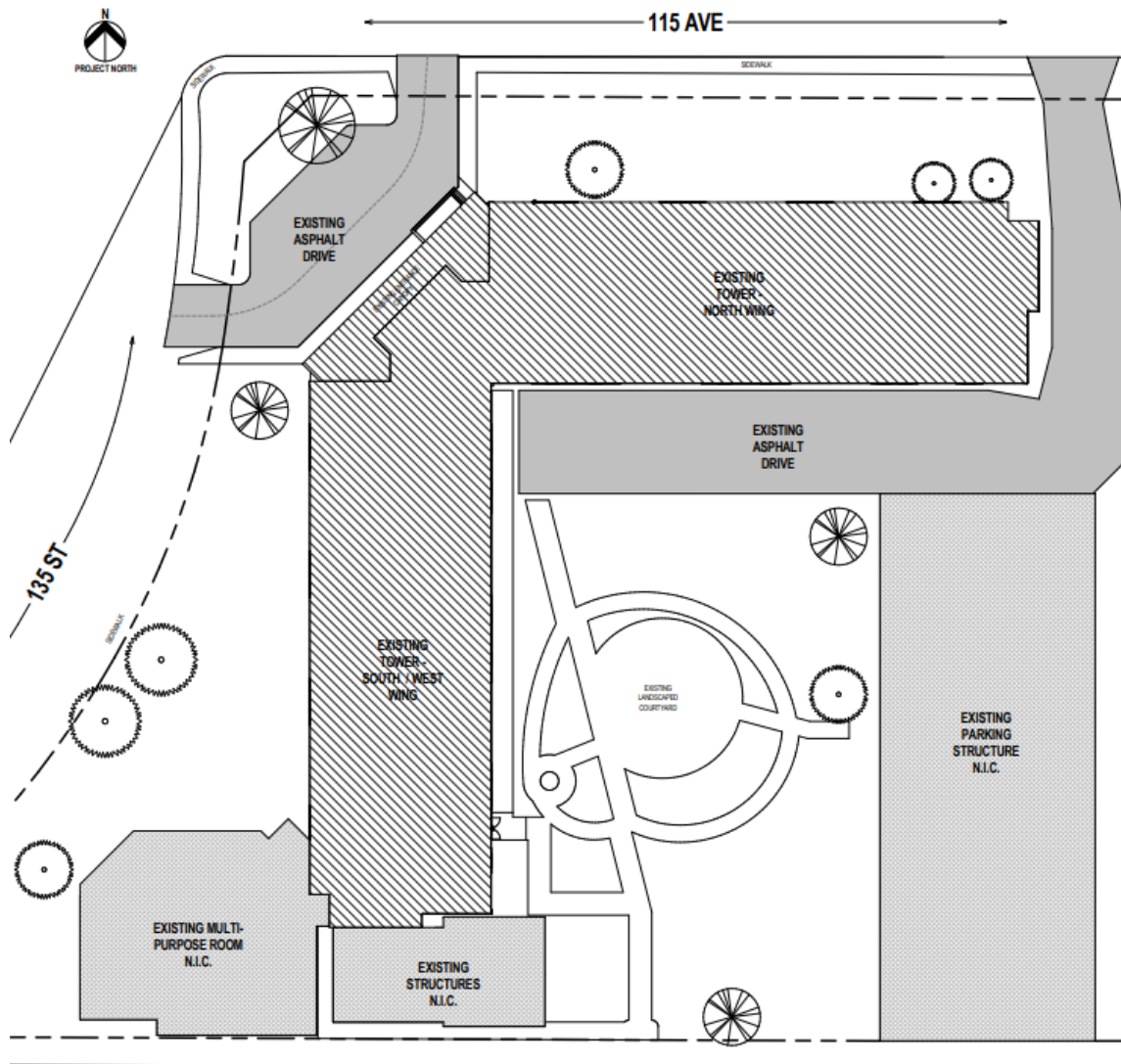
The rehabilitation project includes four phases. The first phase, completed in November 2019, enclosed the building's balconies and replaced the existing windows, which resulted in energy efficiency improvements. The second phase replaced the entire fire alarm system and installed an integrated sprinkler system, both of which were completed in November 2020.

The third phase, which this grant application is proposed to fund, is to replace the existing sewer stack, vent stack, cross over, domestic hot water and domestic cold water pipes in each residential unit. This work is being done as the existing cast iron pipes have rusted from the inside out. While the work is being done, tenants are provided a guest suite in the building or a hotel room with a kitchenette based on their mobility. Work began September 2021 and is expected to be completed August

2022. The fourth and final phase of the building rehabilitation is the upgrading of elevator motors, as the existing motors are outdated and inefficient. This phase is planned to start January 2023.

The property is zoned High Rise Apartment Zone (RA9), which permits the rehabilitation work and a building permit for the third phase of the project was issued on June 15, 2021. The development meets minimum accessibility requirements of the National Building Code 2019 Alberta Edition.

Site Plan



**Matheson Seniors Housing Corp. Matheson Seniors' Residence Grant
Funding Affordable Housing Agreement General Terms and Conditions**

- The parties to the Agreement are the City of Edmonton and Matheson Seniors Housing Corp.
- The City will provide funding up to the maximum amount of \$954,350 to Matheson Seniors Housing Corp., to be paid out on a multi year basis over a time period starting in 2022, as generally and non-exhaustively described as follows;
 - 100 per cent on execution of the agreement, condition removal, satisfactory production of quantity surveyor certificate confirming physical construction of the development is complete and final capital costs, and maintenance schedule.
- The funding is to be used towards the capital costs of rehabilitating 300 existing affordable housing units in the Matheson Seniors' Residence located at 11445 135 Street NW in the Woodcroft neighbourhood.
- The term of the grant funding affordable housing agreement expires 20 years after the date upon which the City issues the funding payment to Matheson Seniors Housing Corp.
- Substantial completion of the rehabilitation project must occur within two years of the execution of the Agreement.
- Prospective occupants of the affordable housing units must qualify as eligible occupants under criteria established or approved by the City.
- The City is entitled to register a caveat or other instruments on title to protect its interest under the Agreement.
- In the event of a substantial breach of the Agreement by Matheson Seniors Housing Corp., remedies may include but are not limited to funding being repayable to the City on a prorated basis.

The grant funding affordable housing agreement shall be in a form acceptable to Legal Services, and in content acceptable to the Branch Manager of Social Development. The approval of the grant funding affordable housing agreement includes the approval of such corrective, conformance, and incidental amendments to the Terms and Conditions, and to the form and content, as necessary or desirable to give effect to or implement the funding transaction, all as may be subsequently approved by the Branch Manager of Social Development.

The Mustard Seed Foundation Canora Development Overview

The permanent supportive housing development proposed by The Mustard Seed Foundation is located at 10158 and 10162 155 Street NW on two single detached lots in the Canora neighbourhood.

The land is zoned Low Intensity Business Zone (CB1), which permits permanent supportive housing and a major development permit for supportive housing was submitted November 22, 2021, and is currently under review.

The supportive housing development will provide 38 self-contained studio units. As all units are studio-style, this project will support single adults, specifically those experiencing homelessness or housing insecurity, with 10 units dedicated to Indigenous populations. The units will be rented at 70 to 80 per cent of average market rents for a minimum of 30 years.

The 38 supportive housing units will help achieve the City's goal of constructing 900 supportive housing units by 2024 as identified in the Updated Plan to End Homelessness.

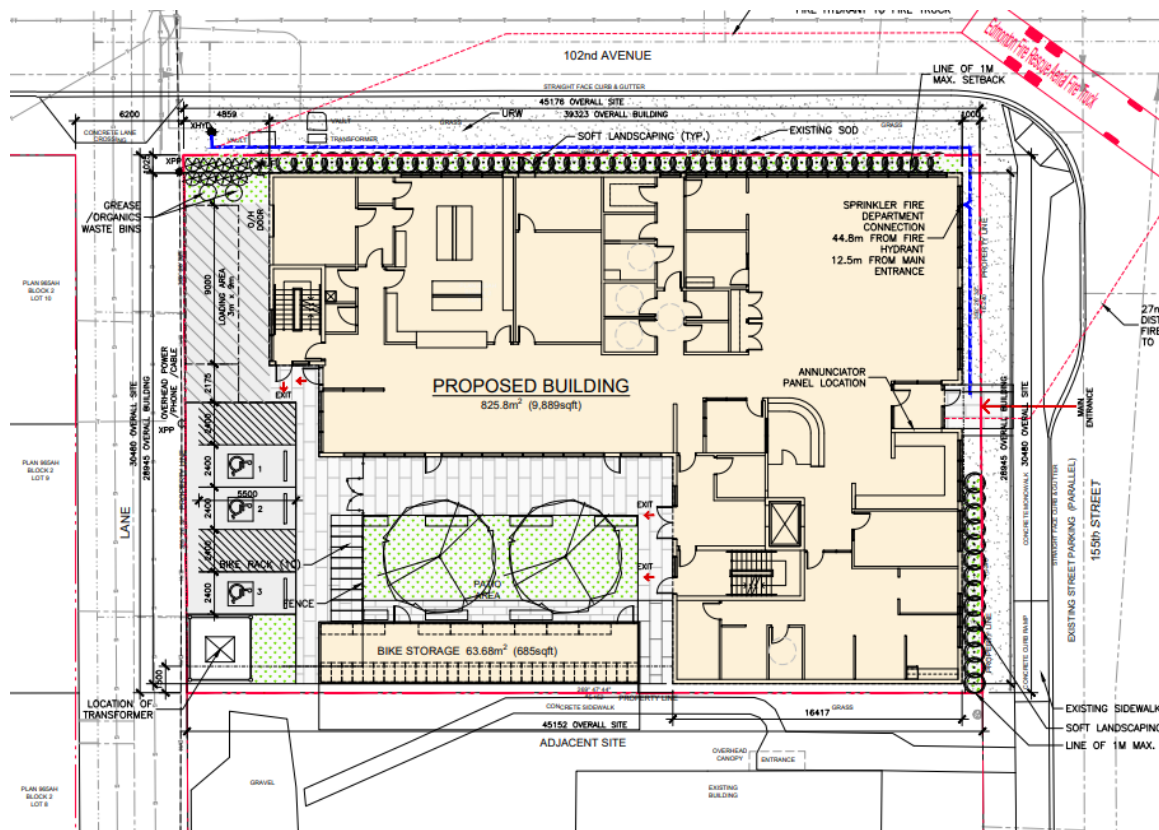
Location



Renderings



Site Plan



The proposed development would offer a continuum of wrap-around supports, designed to promote and foster wellness and sustainable living, by engaging and empowering tenants to access services that best meet their identified needs. This model provides an integrated approach with a principal focus on building meaningful relationships with other tenants, staff and community members, as well as the neighbourhood as a whole.

Four primary components comprise the platform of service provision. Firstly, and at the core, are direct housing supports which will be services dedicated to meeting the direct needs and fostering success of tenants living in the building. The success of direct housing supports will be reliant and bolstered by the three other key components. Community hub services are an existing support offered at this site and will be fundamental in connecting those in the housing program with the community, maintaining and creating relationships that will be integral to their housing and wellness.

On-site services not provided by housing staff, or the community hub will be complemented by in-reached services embracing both internal and external agency services. Lastly, referrals, and assistance in maintaining supports with other

community services will serve to promote a holistic and inclusive support system for tenants.

Amenities available for residents include an outdoor patio area, indoor bicycle storage, community and dining rooms, mail boxes and a computer access area.

The development will achieve a minimum 15 per cent decrease in operating energy consumption and greenhouse gas emissions relative to the 2017 National Energy Code for Buildings.

The development meets minimum accessibility requirements of the National Building Code 2019 Alberta Edition. The development will incorporate eight adaptable dwelling units, in excess of the required ratio of one per every ten units.

The Mustard Seed Foundation Canora Grant Funding Affordable Housing Agreement General Terms and Conditions

- The parties to the Agreement are the City of Edmonton and The Mustard Seed Foundation.
- The City will provide funding up to the maximum amount of \$2,555,313 to The Mustard Seed Foundation, to be paid out on a multi-year basis over the time period starting 2022, as generally and non-exhaustively described as follows;
 - 30 per cent on execution of the Agreement and condition removal;
 - 30 per cent on satisfactory production of quantity surveyor certificate confirming physical construction of the development is at least 30 per cent complete, and production of satisfactory bond and insurance requirements;
 - 30 per cent on satisfactory production of quantity surveyor certificate confirming physical construction of the development is at least 60 per cent complete, and production of satisfactory bond and insurance requirements; and
 - 10 per cent on satisfactory production of quantity surveyor certificate confirming physical construction of development is complete and final capital costs, copies of occupancy permits, and maintenance schedule.
- The funding is to be used towards the capital costs of constructing 38 new supportive housing units in the Canora development to be located at 10158 and 10162 155 Street NW in the Canora neighbourhood.
- The term of the grant funding affordable housing agreement expires 30 years from the date of issuance of occupancy permit for the last supportive housing unit in the development.
- Substantial completion of the development must occur within two years of the execution of the Agreement.
- Prospective occupants of the supportive housing units must qualify as eligible occupants under criteria established or approved by the City.
- The City is entitled to register a caveat or other instruments on title to protect its interest under the Agreement.

- In the event of a substantial breach of the Agreement by The Mustard Seed Foundation, remedies may include but are not limited to funding being repayable to the City on a prorated basis.

The grant funding affordable housing agreement shall be in a form acceptable to Legal Services, and in content acceptable to the Branch Manager of Social Development. The approval of the grant funding affordable housing agreement includes the approval of such corrective, conformance, and incidental amendments to the Terms and Conditions, and to the form and content, as necessary or desirable to give effect to or implement the funding transaction, all as may be subsequently approved by the Branch Manager of Social Development.

Westrich Garneau Inc. Development Overview

The affordable housing development by Westrich Garneau Inc. is located at 11041 86 Avenue NW on a 0.3 hectare multi-family lot in the Garneau neighbourhood. The development is currently under construction and is expected to be ready for occupancy in April 2023.

The land is zoned Site Specific Development Control Provision 1154, which permits the proposed development.

The six-storey apartment building will provide affordable rentals for single parents, seniors, new immigrants and members of Enoch Cree Nation. Forty-eight units of the building's 159 units will be dedicated as affordable housing. The units will be affordable for a minimum of 20 years and a combination of studio, one-, two- and three-bedroom units will be provided.

Amenities available to building residents will include a fitness center, outdoor patio and lobby with sitting area, as well as underground parking (for a fee).

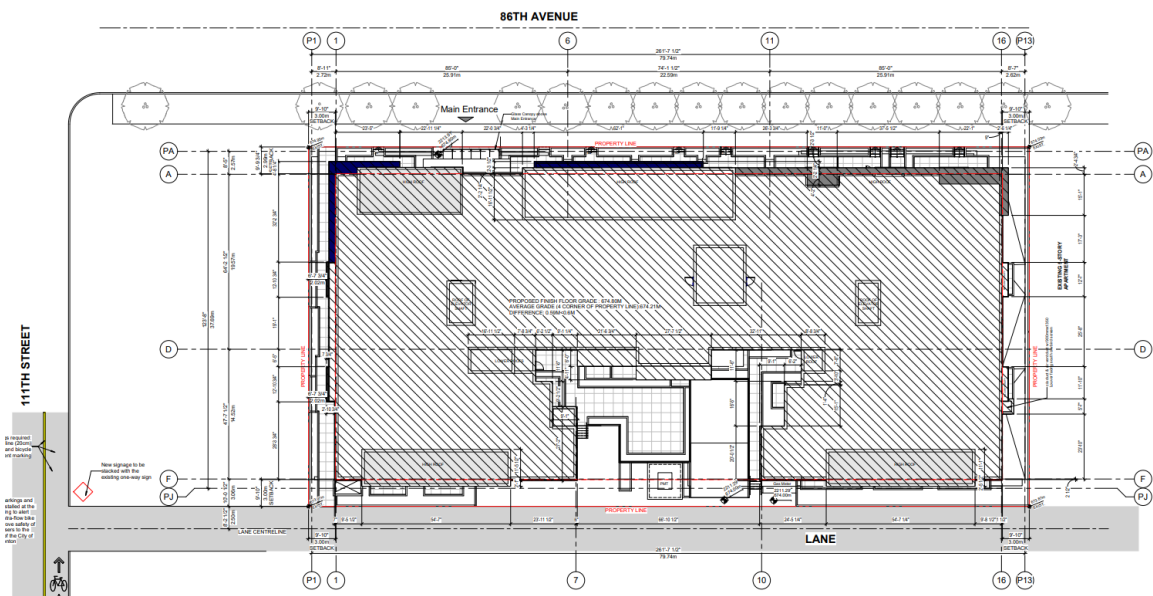
The building will achieve a 26 per cent decrease in operating energy consumption and greenhouse gas emissions relative to the 2015 National Energy Code for Buildings.

The minimum requirements of the National Building Code 2019 Alberta Edition will be met and 20 per cent of the units will be fully accessible.

Rendering



Site Plan



Westrich Garneau Inc. Grant Funding Affordable Housing Agreement General Terms and Conditions

- The parties to the Agreement are the City of Edmonton and Westrich Garneau Inc.
- The City will provide funding up to the maximum amount of \$3,050,000 to Westrich Garneau Inc., to be paid out on a multi-year basis over the time period starting 2022, as generally and non-exhaustively described as follows;
 - 100 per cent on execution of the agreement, condition removal, satisfactory production of quantity surveyor certificate confirming physical construction of the development is complete and final capital costs, copies of occupancy permits, and maintenance schedule.
- The funding is to be used towards the capital costs of constructing 48 new affordable housing units in the West Garneau development located at 11041 86 Avenue NW in the Garneau neighbourhood.
- The term of the grant funding affordable housing agreement expires 20 years from the date of issuance of occupancy permit for the last affordable housing unit in the development.
- Substantial completion of the development must occur within two years of the execution of the Agreement.
- Prospective occupants of the affordable housing units must qualify as eligible occupants under criteria established or approved by the City.
- The City is entitled to register a caveat or other instruments on title to protect its interest under the Agreement.
- In the event of a substantial breach of the Agreement by Westrich Garneau Inc., remedies may include but are not limited to funding being repayable to the City on a prorated basis.

The grant funding affordable housing agreement, and any ancillary agreements thereto, shall be in a form acceptable to Legal Services, and in content acceptable to the Branch Manager of Social Development. The approval of the grant funding affordable housing agreement includes the approval of such corrective, conformance, and incidental amendments to the Terms and Conditions, and to the form and content, as necessary or desirable to give effect to or implement the funding transaction, all as may be subsequently approved by the Branch Manager of Social Development.



EXECUTIVE COMMITTEE REPORT

Taxes Recommended for Cancellation (Write-Off) - Cancellation of Uncollectible Taxes and Penalties

Recommendation of the Committee

That the cancellation (write-off) of \$79,307.42 in uncollectible taxes, including all accrued penalties, as at December 31, 2021, as outlined in Attachment 1 of the February 16, 2022, Financial and Corporate Services report FCS00893, be approved.

History

At the February 16, 2022, Executive Committee meeting, the February 16, 2022, Financial and Corporate Services report FCS00893 was considered.

Attachment

February 16, 2022, Financial and Corporate Services report FCS00893

TAXES RECOMMENDED FOR CANCELLATION (WRITE-OFF)

Cancellation of Uncollectible Taxes and Penalties

RECOMMENDATION

That Executive Committee recommend to City Council:

That the cancellation (write-off) of \$79,307.42 in uncollectible taxes, including all accrued penalties, as at December 31, 2021, as outlined in Attachment 1 of the February 16, 2022, Financial and Corporate Services report FCS00893, be approved.

Report Purpose

Council decision required

City Council approval is required to write off uncollectible taxes, pursuant to s.347 of the *Municipal Government Act*.

Executive Summary

- This annual report recommends the cancellation (write-off) of uncollectible property and Business Improvement Area taxes and penalties.
- There are 226 inactive accounts for a total write-off of \$79,307.42.

REPORT

Administration has reviewed the inactive accounts on the City's tax roll with outstanding property and Business Improvement Area (BIA) taxes. These accounts reflect unpaid taxes and penalties as of December 31, 2021. As all methods of collection have been exhausted, these account balances are recommended for cancellation (write-off).

The annual write-off of uncollectible BIA taxes represents 0.6 per cent of the annual BIA tax levy and reflects account balances related to 2020 and prior years, as the 2021 BIA tax levy was covered by a grant. The increase in uncollectible amounts is attributable to the suspension of collection activity during 2020 and into 2021, due to COVID-19 impacts.

The criteria for cancellation (write-off) is described in Attachment 1. The inactive account types and balances are listed in Attachment 2.

Taxes Recommended for Cancellation (Write-Off) - Cancellation of Uncollectible Taxes and Penalties

Budget/Financial Implications

Administration has budgeted for uncollectible taxes and penalties.

COMMUNITY INSIGHT

No public engagement was undertaken for this process. This annual report to City Council requests approval to write-off uncollectible taxes and penalties on inactive property and Business Improvement Area tax accounts, for which all methods of collection have been exhausted.

ATTACHMENTS

1. Cancellation (Write-Off) Criteria By Category
2. Account Balances Recommended for Write-Off by Category

Cancellation (Write-Off) Criteria By Category

Category	Number of Accounts	Amount of* Write-Off
Not Cost Effective to Collect -- the costs of further collection efforts would likely fail to recover expenses.	122	\$4,732.49
Limited Company Out of Business -- the taxed party was an incorporated entity which ceased operation. There were no assets located to which the claim could be attached.	62	\$16,548.74
Unable to Locate -- the person(s) responsible for payment of the taxes cannot be located.	21	\$53,077.89
Proprietorship Out of Business -- the taxed party was a non-limited entity and the person(s) responsible for payment cannot be located.	20	\$4,755.36
Bankruptcy -- the taxed party has formally declared bankruptcy through the courts; no further monies are expected.	1	\$192.94
TOTAL	226	\$79,307.42

*The amount recommended for write-off includes account balances from 2021 and previous years including accumulated penalty and collection costs. Penalties are as of December 31, 2021.

Account Balances Recommended for Write-Off by Category

Category	Number of Accounts	Amount of Write-Off
Not Cost Effective to Collect - the costs of further collection efforts would likely fail to recover expenses.	122	\$4,732.49

NOT COST EFFECTIVE TO COLLECT

Account Type	Account Number	Account Balance
BIA	46422	\$19.59
BIA	54543	\$74.74
BIA	57629	\$41.01
BIA	58362	\$14.54
BIA	58641	\$4.02
BIA	69109	\$42.55
BIA	69728	\$22.76
BIA	73257	\$1.63
BIA	73524	\$80.10
BIA	75898	\$68.40
BIA	80167	\$3.60
BIA	82498	\$169.08
BIA	83292	\$60.44
BIA	83610	\$93.92
BIA	83841	\$7.63
BIA	84677	\$12.93
BIA	84682	\$79.39
BIA	84752	\$3.91
BIA	84755	\$15.35
BIA	84956	\$48.36
BIA	85213	\$4.99
BIA	85425	\$7.54
BIA	85437	\$14.61
BIA	85527	\$20.53

Attachment 2

Account Type	Account Number	Account Balance
BIA	85708	\$14.41
BIA	85752	\$8.20
BIA	85882	\$87.05
BIA	85915	\$11.04
BIA	85933	\$8.11
BIA	86011	\$59.42
BIA	86117	\$53.43
BIA	86148	\$28.73
BIA	86222	\$71.16
BIA	86239	\$7.63
BIA	86246	\$9.22
BIA	86255	\$49.09
BIA	86283	\$2.22
BIA	86313	\$10.04
BIA	86545	\$3.89
BIA	86567	\$4.02
BIA	86591	\$93.74
BIA	86723	\$76.44
BIA	86728	\$8.67
BIA	86821	\$8.25
BIA	86894	\$47.11
BIA	86934	\$54.84
BIA	87046	\$11.09
BIA	87228	\$4.30
BIA	87257	\$61.88
BIA	87263	\$2.93
BIA	87283	\$10.84
BIA	87294	\$7.38
BIA	87314	\$48.91
BIA	87504	\$11.26
BIA	87516	\$8.08
BIA	87536	\$37.49
BIA	87541	\$8.20
BIA	87561	\$7.90
BIA	87569	\$19.15
BIA	87606	\$10.49

Attachment 2

Account Type	Account Number	Account Balance
BIA	87612	\$1.77
BIA	87628	\$85.16
BIA	87629	\$57.56
BIA	87630	\$5.83
BIA	87635	\$2.72
BIA	87701	\$8.16
BIA	87747	\$5.69
BIA	87962	\$8.36
BIA	87983	\$7.54
BIA	88040	\$21.02
BIA	88054	\$103.30
BIA	88139	\$33.90
BIA	88143	\$7.54
BIA	88147	\$12.83
BIA	88148	\$82.22
BIA	88193	\$34.69
BIA	88221	\$60.44
BIA	88243	\$50.34
BIA	88271	\$5.85
BIA	88539	\$12.33
BIA	88607	\$45.78
BIA	88696	\$8.34
BIA	229377	\$0.94
BIA	320549	\$6.19
BIA	475921	\$1.22
BIA	996353	\$92.34
LEASED	10773659	\$27.47
LEASED	10773658	\$11.81
LEASED	10137398	\$75.51
LEASED	9988223	\$63.91
LEASED	9988780	\$63.91
LEASED	3746492	\$58.28
LEASED	9991861	\$57.52
LEASED	10032418	\$51.13
LEASED	1270545	\$47.11
LEASED	10966970	\$45.05

Attachment 2

Account Type	Account Number	Account Balance
LEASED	11013295	\$44.73
LEASED	9989114	\$38.35
LEASED	9994899	\$38.35
LEASED	9994945	\$35.94
LEASED	9991359	\$30.95
LEASED	10926092	\$30.17
LEASED	10967287	\$28.18
LEASED	11007093	\$25.71
LEASED	10967014	\$22.44
LEASED	10967296	\$22.44
LEASED	9986025	\$21.96
LEASED	10289257	\$0.71
MANU	9966091	\$144.71
MANU	4295390	\$129.62
MANU	4295499	\$124.75
MANU	10081313	\$118.57
MANU	4295036	\$114.27
MANU	4295440	\$94.32
MANU	4295549	\$93.31
MANU	9961607	\$91.74
MANU	4312872	\$89.95
MANU	10016557	\$75.80
MANU	4281788	\$70.74
MANU	4285276	\$65.90
MANU	4295044	\$31.38
MANU	4313060	\$5.51
Sub-Total for Not Cost Effective to Collect		\$4,732.49

Attachment 2

Category	Number of Accounts	Amount of Write-Off
Limited Company Out of Business - the taxed party was an incorporated entity which ceased operation. There were no assets located to which the claim would be attached.	62	\$16,548.74

LIMITED COMPANY OUT OF BUSINESS

Account Type	Account Number	Account Balance
BIA	69506	\$252.04
BIA	77484	\$183.17
BIA	78072	\$191.50
BIA	79240	\$156.32
BIA	79680	\$270.75
BIA	80880	\$167.11
BIA	82093	\$207.73
BIA	82387	\$238.72
BIA	83355	\$273.94
BIA	84121	\$184.33
BIA	84143	\$218.22
BIA	84198	\$258.62
BIA	84760	\$167.28
BIA	85101	\$119.41
BIA	85113	\$279.90
BIA	85148	\$288.81
BIA	85173	\$211.45
BIA	85475	\$252.36
BIA	85733	\$96.99
BIA	85810	\$155.76
BIA	86069	\$262.51
BIA	86243	\$219.94
BIA	86280	\$137.05
BIA	86305	\$187.87

Attachment 2

Account Type	Account Number	Account Balance
BIA	86438	\$152.32
BIA	86573	\$254.78
BIA	86578	\$204.16
BIA	86718	\$319.97
BIA	86878	\$439.79
BIA	86893	\$350.78
BIA	86912	\$93.20
BIA	87110	\$278.94
BIA	87119	\$121.57
BIA	87250	\$391.62
BIA	87471	\$259.62
BIA	87474	\$258.84
BIA	87535	\$87.36
BIA	87540	\$95.51
BIA	87619	\$342.15
BIA	87714	\$441.92
BIA	87853	\$218.16
BIA	87963	\$155.15
BIA	87993	\$250.38
BIA	88058	\$267.01
BIA	88082	\$175.99
BIA	88146	\$330.15
BIA	88240	\$119.83
BIA	88274	\$336.77
BIA	88288	\$155.31
BIA	88356	\$352.60
BIA	88508	\$283.98
BIA	88532	\$143.94
BIA	88554	\$291.05
BIA	88691	\$278.44
BIA	132357	\$197.58
BIA	199505	\$315.59
BIA	213348	\$198.18
BIA	400200	\$119.83
BIA	681205	\$317.36
BIA	999897	\$405.38

Attachment 2

Account Type	Account Number	Account Balance
LEASED	3857265	\$2,068.80
LEASED	10970823	\$492.95
Sub-Total for Limited Company Out of Business		\$16,548.74

Attachment 2

Category	Number of Accounts	Amount of Write-Off
Unable to Locate - the person(s) responsible for payment of the taxes cannot be located.	21	\$53,077.89

UNABLE TO LOCATE

Account Type	Account Number	Account Balance
BIA	82095	\$74.63
BIA	86163	\$256.46
BIA	87127	\$152.13
BIA	87156	\$193.93
BIA	87324	\$253.45
BIA	87538	\$235.88
BIA	87856	\$445.23
BIA	87994	\$142.10
BIA	88214	\$450.51
BIA	88224	\$205.63
BIA	88411	\$173.41
BIA	88625	\$442.36
LEASED	10772728	\$527.68
LEASED	10262996	\$43,600.85
MANU	4281150	\$1,138.17
MANU	4295143	\$865.48
MANU	4295291	\$559.09
MANU	4295333	\$344.71
MANU	9939742	\$153.35
MANU	9982209	\$2,125.59
MANU	9990022	\$737.25
Sub-Total for Unable to Locate		\$53,077.89

Attachment 2

Category	Number of Accounts	Amount of Write-Off
Proprietorship Out of Business -	20	\$4,755.36

the taxed party was a non-limited entity and the person(s) responsible for payment cannot be located.

PROPRIETORSHIP OUT OF BUSINESS

Account Type	Account Number	Account Balance
BIA	76631	\$294.35
BIA	83333	\$75.46
BIA	83373	\$445.23
BIA	84816	\$199.28
BIA	85168	\$176.91
BIA	86048	\$192.82
BIA	86219	\$214.17
BIA	86503	\$360.89
BIA	86757	\$181.16
BIA	87023	\$241.56
BIA	87232	\$258.34
BIA	87240	\$199.28
BIA	87565	\$273.29
BIA	87935	\$290.61
BIA	87954	\$109.80
BIA	88347	\$289.80
BIA	182246	\$240.66
BIA	292441	\$348.78
BIA	300020	\$290.61
BIA	996706	\$72.36
Sub-Total for Proprietorship Out of Business		\$4,755.36

Attachment 2

Category	Number of Accounts	Amount of Write-Off
Bankruptcy - the taxed party has formally declared bankruptcy through the courts; no further monies are expected.	1	\$192.94

BANKRUPTCY

Account Type	Account Number	Account Balance
BIA	481085	\$192.94
Sub-Total for Bankruptcy		\$192.94
Total Business Improvement Area (BIA), Property (PROP), Manufactured Home (MANU) and Leased Account Cancellation (Write-Off)		\$79,307.42

BYLAW 19974

A Bylaw to authorize the City of Edmonton to impose a special tax for the repair and maintenance of the Alley Lighting

RECOMMENDATION

1. That the 2022 operating expenditure and revenue budget within Parks and Road Services, City Operations, specific to the cost to repair and maintain existing alley lights (expenditure) and the offsetting special tax revenue (revenue), both be increased to \$1,889,764, as outlined in the February 22, 2022, Financial and Corporate Services report FCS01038.
2. That Bylaw 19974 be given three readings.

Purpose

To impose a special tax for the repair and maintenance of existing alley lighting.

Readings

After the budget adjustment is approved, then Bylaw 19974 is ready for three readings.

A majority vote of City Council on all three readings is required for passage.

If Council wishes to give three readings during a single meeting, then prior to moving third reading, Council must unanimously agree “That Bylaw 19974 be considered for third reading.”

Position of Administration

Administration supports this Bylaw

Report Summary

This budget adjustment and Bylaw provides for funding to cover the repair and maintenance of existing alley lighting, consistent with City process.

REPORT

The costs to construct alley lighting are paid in whole or in part by benefitting property owners through a local improvement tax. Benefitting property owners are also subject to a special tax to

Bylaw 19974 - A Bylaw to authorize the City of Edmonton to impose a special tax for the repair and maintenance of the Alley Lighting

cover the costs for the repair, maintenance and energy consumption of the alley lights. The special tax rate is recalculated annually by the Parks and Roads Services branch to fairly reflect the cost to repair, maintain and power alley lights across the City.

The 2022 special tax rate is \$2.21 per assessable metre for Alley Lighting, an increase of 39.87 per cent compared to the cost of \$1.58 per assessable metre in 2021. The 2022 rate is based on historical cost analysis to estimate costs required to power and maintain alley lighting in 2022. The increase in the 2022 rate is the result of higher than anticipated projected maintenance costs in 2022, based on costs experienced in 2021. 2021 saw higher material costs, as well as an unanticipated change in process along with increased modifications and upgrades required by the electric utility to complete maintenance to required standards.

In accordance to Section 385 of the *Municipal Government Act*, the special tax collected for repair and maintenance of alley lighting must match the estimated cost of the specific service included in the budget for 2022. As a result, a budget adjustment is also required to reflect the estimated cost in 2022 for the repair, maintenance and energy consumption of the alley lights. The estimated cost of the repair and maintenance of Alley Lighting for the 2022 taxation year is \$1,889,764. This adjustment will not impact the general tax-levy for 2022 previously approved by City Council during the fall budget deliberations, as it is specific to alley lighting and benefit property owners. The expenditures are fully offset by revenue generated through this special tax.

This Bylaw needs to be approved at the February 22, 2022 Council meeting in order for the rate to be added to the 2022 property tax accounts of homeowners benefiting from alley lighting, which are typically mailed out in late May of every year.

COMMUNITY INSIGHTS

Alley lighting maintenance costs are assessed annually to property owners along the alley. The change in rate is communicated to the affected property owners with the receipt of their annual tax assessments.

ATTACHMENT

1. Bylaw 19974

OTHERS REVIEWING THIS REPORT

M. Plouffe, City Solicitor

CITY OF EDMONTON

BYLAW 19974

A Bylaw to authorize the City of Edmonton to impose a special
tax for the repair and maintenance of the Alley Lighting

WHEREAS:

- A. Section 382(1) of the *Municipal Government Act*, R.S.A. 2000, c. M-26 authorizes Council to pass a special tax bylaw annually to raise revenue to pay for a special service or purpose;
- B. Section 382(1)(f) allows a special tax to cover the cost of repair and maintenance of roads, boulevards, sewer facilities and water facilities;
- C. The City of Edmonton offers a special service relating to the repair and maintenance of Alley Lighting which is one aspect of the repair and maintenance of roads;
- D. The estimated costs of the repair and maintenance of Alley Lighting for the 2022 taxation year is \$1,889,764.00;
- E. It is deemed in the public interest that the special tax as hereinafter described should be assessed and levied.

THEREFORE, THE COUNCIL OF THE CITY OF EDMONTON DULY ASSEMBLED
ENACTS AS FOLLOWS:

1. That there is assessed and levied a special tax for 2022 upon all lands fronting or abutting alleys served by the repair and maintenance of the Alley Lighting.
2. The special tax to be levied shall be based on each unit of frontage to the alley as outlined in this bylaw, except as otherwise modified by this bylaw.
3. The special tax to be assessed and levied at a rate of \$2.21 per assessable metre of the lands fronting or abutting upon the alleys.
4. The number of assessable metres shall be the number of linear metres of the lands measured along the portion abutting the alleys.
5. For condominium titled units the assessable metres for the frontage of the condominium plan, where the repair and maintenance is undertaken, will be divided by the number of titled condominium units. Each titled condominium unit will bear a per parcel share of such amount as calculated in section 3.
6. Where some of the parcels of lands abutting on the alleys appear to call for a smaller or larger proportionate assessment on account of being corner lots or being of a different plan or shape from the other parcels, those exceptional parcels of land may be assessed as having a smaller or larger number of metres abutting thereon than they actually have so that each parcel of land fronting or abutting on the alleys will bear a fair, just and equitable proportion of the special tax.

(a) The assessed frontage (the abutting portion of the parcel) shall be calculated, dependent on the parcel shape and dimensions by using one of the following methods:

- i) for parcels of land having equal front and rear parcel dimensions, the assessed frontage shall be equal to the abutting parcel dimension,
- ii) for irregular shaped parcels of land having a front and rear parcel dimension that are different but do not exceed the other by more than twice as much, the assessed frontage shall be equal to the average lot dimensions of the front and rear of the parcel;
- iii) for odd or pie shaped parcels of land having a front and rear parcel dimension that are different and exceed the other by more than twice as much, the assessed frontage shall be equal to the average of the front length of the parcel and the scaled dimension of the rear of the parcel (based on a projection of the shortest parcel flankage length being imposed to that point on the longest parcel flankage length) and this average shall not exceed by more than two times the front length of the parcel.

(b) With respect to the side or flankage of such parcels, they shall be assessed fifteen percent (15%) of the total number of lineal metres along the side or flankage thereof abutting the road where the local improvement is undertaken.

7. This bylaw shall take effect on the day it is passed.

READ a first time this	day of	2022;
READ a second time this	day of	2022;
READ a third time this	day of	2022;
SIGNED AND PASSED this	day of	2022.

THE CITY OF EDMONTON

.....

MAYOR

.....

CITY CLERK

BYLAW 19976

A Bylaw to amend Bylaw 19164, to authorize the City of Edmonton to undertake, construct and finance Integrated Infrastructure Services Project, Stadium LRT Station Upgrade

RECOMMENDATION

That Bylaw 19976 be given first reading.

Purpose

To amend Bylaw 19164, to decrease the borrowing authority by \$26,672,000 from \$28,340,000 to \$1,668,000.

Readings

Bylaw 19976 is ready for first reading only.

Advertising and Signing

This Bylaw will be advertised in the Edmonton Journal on Thursday, February 24, 2022 and Thursday, March 3, 2022. The Bylaw cannot be signed and thereby passed prior to Monday, March 21, 2022.

Position of Administration

Administration supports this Bylaw.

Report Summary

This Bylaw amendment will decrease the borrowing authority by \$26,672,000 from \$28,340,000 to \$1,668,000.

REPORT

The history of this borrowing bylaw is as follows:

- at the February 19, 2020 City Council meeting, Bylaw 19164 was passed.

Bylaw 19976 - A Bylaw to amend Bylaw 19164, to authorize the City of Edmonton to undertake, construct and finance Integrated Infrastructure Services Project, Stadium LRT Station Upgrade

During the 2021 Fall Supplemental Capital Budget Adjustment deliberations from November 30, to December 17, 2021, Council approved a decrease in the tax-supported debt for profile 19-10-1011 Stadium LRT Station Upgrade of \$26,672,000, from \$28,340,000 to \$1,668,000.

In order to fully utilize Green-trip funding allocated to the City of Edmonton, a funding swap between the Stadium LRT station upgrade project (19-10-1011 Stadium LRT Station Upgrade) and Metro Line North LRT from Churchill to NAIT (08-66-1672 NLRT (Downtown to NAIT)) will occur with \$26,672,000 of tax supported debt transferred to the 08-66-1672 NLRT (Downtown to NAIT) capital profile in exchange for \$26,672,000 of Greentrip Funding transferred to 19-10-1011 Stadium LRT Station Upgrade. There is no cost increase, additional work, or change in scope to either of the projects as a result of this funding swap. This funding swap is strictly required to fully maximize provincial Green-trip funds.

A corresponding amendment will be made to Bylaw 14880 Transportation Project, North Light Rail Transit (Metro Line North LRT from Churchill to NAIT) to increase the borrowing authority through Financial and Corporate Services report FCS01040, also being presented to City Council on February 22, 2022.

In accordance with section 258 of the *Municipal Government Act*, RSA 2000, c. M-26, where an increase to the original cost of the capital property exceeds 15 per cent then the borrowing bylaw must be advertised.

Bylaw 19976 will be resubmitted for second and third readings after the advertising and the expiration of the associated petition period.

COMMUNITY INSIGHTS

Borrowing bylaws reflect a legislative requirement of the borrowing process. As a result, no community insight is undertaken with respect to the borrowing bylaw process. Where required by the *Municipal Government Act*, borrowing bylaws are advertised.

ATTACHMENTS

1. Bylaw 19976
2. Bylaw 19164 Redline Version
3. Capital Profile 19-10-1011

OTHERS REVIEWING THIS REPORT

- M. Plouffe, City Solicitor

CITY OF EDMONTON

BYLAW 19976

A Bylaw to amend Bylaw 19164, to authorize the City of Edmonton to undertake, construct and finance Integrated Infrastructure Services Project, Stadium LRT Station Upgrade

WHEREAS:

- A. The Council of the City of Edmonton on February 19, 2020 duly passed Bylaw 19164, authorizing the City of Edmonton to undertake, construct and finance Integrated Infrastructure Services Project, Stadium LRT Station Upgrade (“Project”), and also authorizing the Mayor and Chief Administrative Officer to borrow the sum of \$28,340,000.00 for a period of twenty (20) years with the principal and interest to be repaid in semi-annual or annual instalments;
- B. The borrowing authority for the project will be decreased by \$26,672,000.00 from \$28,340,000.00 to \$1,668,000.00. Furthermore, the total cost of the Project is now \$45,776,000 as a result of previously approved adjustments.

THEREFORE, THE COUNCIL OF THE CITY OF EDMONTON DULY ASSEMBLED
ENACTS AS FOLLOWS:

1. Bylaw 19164 is amended in the preamble, Section (B), thereof by deleting the figure “\$31,679,000.00” as it appears and by substituting the figure “\$45,776,000.00”.
2. The said Bylaw is further amended in the preamble, Section (D) and in Sections (1) and (2), thereof by deleting the figure “\$28,340,000.00” as it appears and by substituting the figure “\$1,668,000.00”.
3. The said Bylaw is further amended in the preamble, Section (G), thereof by deleting the date “December 31, 2018” and the amount of “\$3,046,193,851.11” for the existing debt of the City of Edmonton as it appears and substituting the date “December 31, 2020” and the figure “\$3,407,145,492.13”.
4. The said Bylaw is further amended by replacing Schedule “A” with Schedule “A” as attached.

5. This Bylaw shall take effect on the day of the final passing thereof.

READ a first time this	day of	2022;
READ a second time this	day of	2022;
READ a third time this	day of	2022;
SIGNED AND PASSED this	day of	2022.

THE CITY OF EDMONTON

.....
MAYOR

.....
CITY CLERK

Schedule "A"

Integrated Infrastructure Services Project, Stadium LRT Station Upgrade
20 Years
(in thousands of dollars)

Project Number	Project Name	Estimated Total Cost	Federal Grants	Provincial Grants	Municipal Sustainability Initiative	Pay-As- You-Go	Green-Trip	Borrowing Request	2021 and Prior Years	2022
19-10-1011	Stadium LRT Station Upgrade	\$ 45,776	\$ 12,759	\$ 584	\$ 273	\$ 3,820	\$ 26,672	\$ 1,668	\$ (4,322)	\$ 5,990
		<u>\$ 45,776</u>	<u>\$ 12,759</u>	<u>\$ 584</u>	<u>\$ 273</u>	<u>\$ 3,820</u>	<u>\$ 26,672</u>	<u>\$ 1,668</u>	<u>\$ (4,322)</u>	<u>\$ 5,990</u>

CITY OF EDMONTON

BYLAW 19164

A Bylaw to authorize the City of Edmonton to undertake, construct and finance Integrated Infrastructure Services Project, Stadium LRT Station Upgrade

WHEREAS:

- A. The Council of the City of Edmonton has decided to issue a bylaw pursuant to Sections 251 and 258 of the *Municipal Government Act*, R.S.A. 2000, c. M-26, to authorize the City of Edmonton to undertake, construct and finance Integrated Infrastructure Services Project, Stadium LRT Station Upgrade (the “Project”);
- B. The City of Edmonton has made plans, specifications and estimates for the said Project and confirms the total cost of the said Project is ~~\$31,679,000.00~~ **\$45,776,000.00**;
- C. There are grants or contributions to be received or applied to the said Project as detailed in Schedule “A”;

- D. In order to construct and complete the said Project, it will be necessary for the City of Edmonton to borrow the sum of ~~\$1,668,000.00~~~~\$28,340,000.00~~ for the terms and conditions referred to in this bylaw and as detailed in Schedule “A”;
- E. The above expenditure was approved by the City of Edmonton in its estimate of capital expenditures through the 2019 - 2022 Capital Budget;
- F. The City of Edmonton will repay the indebtedness over a period of twenty (20) years in semi-annual or annual instalments, with interest not exceeding nine per cent (9%) per annum;
- G. The amount of the existing debenture debt of the City of Edmonton on ~~December 31, 2020~~~~December 31, 2018~~ is ~~\$3,407,145,492.13~~~~\$3,046,193,851.11~~ as calculated in accordance with the *Debt Limit Regulation*, A.R. 255/2000, as amended, no part of which is in arrears;
- H. The probable lifetime of the Project is a minimum of twenty (20) years;
- I. All required approvals for the Project have been obtained and the Project is in compliance with all Acts and Regulations of the Province of Alberta;

THEREFORE, THE COUNCIL OF THE CITY OF EDMONTON DULY ASSEMBLED
ENACTS AS FOLLOWS:

1. That for the purpose of said Project, the sum of ~~\$1,668,000.00~~~~\$28,340,000.00~~ will be borrowed by way of debenture on the credit and security of the City of Edmonton at large.

2. The debentures to be issued under this Bylaw shall not exceed the sum of ~~\$1,668,000.00~~~~\$28,340,000.00~~, and may be in any denomination not exceeding the amount authorized by this Bylaw and shall be dated having regard to the date of the borrowing.
3. The debentures shall bear interest during the currency of the debentures, at a rate not exceeding nine per cent (9%) per annum, payable semi-annually or annually.
4. The debentures shall be issued for a period of twenty (20) years and the City of Edmonton will repay the principal and interest in semi-annual or annual instalments.
5. For the purpose of this Bylaw, the Chief Elected Official (as defined by the *Municipal Government Act*) means the Mayor, and the Chief Administrative Officer (as defined by the *Municipal Government Act*) means the City Manager of the City of Edmonton. The Mayor and the City Manager shall authorize such bank or financial institution to make payments to the holder of the debentures, on such date and in such amounts as specified in the repayment schedule forming part of each debenture.
6. The debentures shall be signed by the Mayor and the City Manager of the City of Edmonton and the City Manager shall affix thereto the corporate seal of the City of Edmonton to the debentures.
7. There shall be levied and raised in each year of the currency of the debentures a rate or rates, in an amount sufficient to pay the principal and interest falling due in such year on such debentures by a rate sufficient therefore on all the taxable property in the City and collectible at the same time and in the same manner as other rates.

8. The indebtedness is contracted on the credit and security of the City of Edmonton at large.
9. The net amount realized by the issue and sale of debentures authorized under this Bylaw shall be applied only for the purposes for which the indebtedness was created.
10. This Bylaw shall take effect on the day of the final passing thereof.

READ a first time this	20th	day of	January	2020;
READ a second time this	19th	day of	February	2020;
READ a third time this	19th	day of	February	2020;
SIGNED AND PASSED this	19th	day of	February	2020.

THE CITY OF EDMONTON

.....

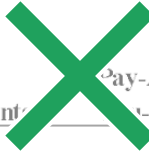
MAYOR

.....

CITY CLERK

Schedule "A"

Integrated Infrastructure Services Project, Stadium LRT Station Upgrade
 20 Years
 (in thousands of dollars)



Project Number	Project Name	Estimated Total Cost	Grants	Pay-As- You-Go	Borrowing Request	2020	2021	2022	2023
19-10-1011	Stadium LRT Station Upgrade	\$ 31,679	\$ 1,590	\$ 1,749	\$ 28,340	\$ 4,350	\$ 18,000	\$ 5,990	\$ -
		<u>\$ 31,679</u>	<u>\$ 1,590</u>	<u>\$ 1,749</u>	<u>\$ 28,340</u>	<u>\$ 4,350</u>	<u>\$ 18,000</u>	<u>\$ 5,990</u>	<u>\$ -</u>

Schedule "A"

Integrated Infrastructure Services Project, Stadium LRT Station Upgrade
 20 Years
 (in thousands of dollars)

Project Number	Project Name	Estimated Total Cost	Federal Grants	Provincial Grants	Municipal Sustainability Initiative	Pay-As- You-Go	Green-Trip	Borrowing Request	2021 and Prior Years	2022
19-10-1011	Stadium LRT Station Upgrade	\$ 45,776	\$ 12,759	\$ 584	\$ 273	\$ 3,820	\$ 26,672	\$ 1,668	\$ (4,322)	\$ 5,990
		<u>\$ 45,776</u>	<u>\$ 12,759</u>	<u>\$ 584</u>	<u>\$ 273</u>	<u>\$ 3,820</u>	<u>\$ 26,672</u>	<u>\$ 1,668</u>	<u>\$ (4,322)</u>	<u>\$ 5,990</u>

CAPITAL PROFILE REPORT

PROFILE NAME: **STADIUM LRT STATION UPGRADE**
 PROFILE NUMBER: **19-10-1011**
 DEPARTMENT: **Integrated Infrastructure Services**
 LEAD BRANCH: **Infrastructure Planning & Design**
 PROGRAM NAME:
 PARTNER: **Edmonton Transit Service**
 BUDGET CYCLE: **2019-2022**

FUNDED

PROFILE STAGE:	Approved
PROFILE TYPE:	Standalone
LEAD MANAGER:	Bruce Ferguson
PARTNER MANAGER:	Eddie Robar
ESTIMATED START:	January, 2019
ESTIMATED COMPLETION:	December, 2022

Service Category:	Public Transit	Major Initiative:	Alberta Community Transit Fund
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GROWTH	RENEWAL	PREVIOUSLY APPROVED:	45,776
	100	BUDGET REQUEST:	-
		TOTAL PROFILE BUDGET:	45,776

PROFILE DESCRIPTION

The project includes rebuilding the Stadium LRT station to align with urban LRT design principles. Major elements include improvement to public safety, security, barrier-free accessibility, and means of integrating the station into the future Stadium Transit Oriented Development Plans, and alignment with the recently approved Stadium Area Redevelopment Plan (Council-approved February 2018).

Development phase for this project is estimated at \$1.5M (+/- 50%) to advance the project from Checkpoint 2 to 3. Total cost for design and construction for the upgrades is estimated at \$27.5M (+/- 50%).

PROFILE BACKGROUND

The station opened in 1978 as part of the original LRT line. It is nearing 40 years of age and is in need of upgrades to replace aging infrastructure. There is also a desire to improve public safety, accessibility and security. Upgrades of this station will align with a number of the City's plans and operations including the the Stadium Transit Oriented Development. Conceptual planning is funded under the PTIF program and will be completed in 2018.

This project will complete the design and build, the project is considered 'growth' due to significant upgrades proposed to the existing facility to address safety, security, barrier-free accessibility, and urban integration.

PROFILE JUSTIFICATION

Stadium station is more than 40 years of age and is in need of significant upgrades to replace aging infrastructure and improve public safety, security, and accessibility. Integrating the station with the future Stadium Transit Oriented Development plans and alignment with the Stadium Area Redevelopment Plan has also been identified as a requirement.

STRATEGIC ALIGNMENT

This profile aligns with the strategic objective of making transformational impacts in our community by making a discrete and measurable impact on Council's four strategic goals: healthy city, urban places, regional prosperity and climate resilience, by creating a community to connect people to what matters to them. This profile also aligns to the City of Edmonton's Transportation Master Plan: Enhancing transit safety and security measures.

ALTERNATIVES CONSIDERED

Main alternatives are:

- Status quo: continued use and maintenance of the existing facility without renewal or enhancement. The Stadium Area Redevelopment Plan identifies a future station location to the south, nearer to the new "Main Street" crossing. This relocation is not anticipated for 25+ years, and may include retaining the existing station location as a Commonwealth Stadium "event-only" station.
- Renewal: reduce scope of the project to minor rehabilitation, mainly update of finishes and rehabilitation of main building systems.

In both instances, the main concerns for safety, security and accessibility are not addressed and the rider experience is not improved.

COST BENEFITS

Tangible Benefits:

- Improved station safety and security
- Improved barrier-free accessibility
- Improved convenience and comfort
- Improved architectural appearance
- Integration with future area development plans

Intangible Benefits:

- Will promote Transit use as the preferred mode of transportation
- Will promote development of the Stadium Transit Oriented Development and implementation of the Stadium Area Redevelopment Plan

KEY RISKS & MITIGATING STRATEGY

Tender prices may exceed the available budget:

Contingencies will be built into the scope and budget of the work

The work scope will be reduced so as not to exceed approved funding amounts.

A budget adjustment or budget transfer from other Transit profiles could be evaluated.

Project deadline not met: Scope reduction.

Maintaining a functional station and LRT line during construction: project phasing and constructability considerations analyzed and planned during design.

RESOURCES

The project will be delivered using a combination of internal and external resources of Integrated Infrastructure Services. All procurement of external resources will follow relevant corporate procurement Administrative Directives & Procedures and Council policies.

CONCLUSIONS AND RECOMMENDATIONS

Approval of this capital profile is required to fund the detailed design and construction of the upgrades to Stadium LRT Station so that this important infrastructure asset can continue to serve the citizens of Edmonton by improving the safety, security, barrier-free accessibility, and integration with the neighbourhood.

CONTINGENCY OF APPROVAL

CAP#18/Motion 10.2: Held in abeyance subject to approval of ACT grant funding. Report returns to Committee at the Spring SCBA.

CHANGES TO APPROVED PROFILE

2019 Spring SCBA (CA#10): (2.5.6) Adjustment of profile funding sources based on the actual amount of grant funding received from Alberta Community Transit fund (ACTF) (\$1.5M) and an increase to TSD (\$804K).

2019 Fall SCBA #19-34A/5.4 ACT Funding Reduction:

To reduce the total profile budget to \$750K based on cancellation of Alberta Community Transit Fund grant.

2019 Fall SCBA #19-35/3.1 Capital Amendment CP-7(5):

That capital profile #19-10-1011, be increased by \$29,090,000 to fund planning and design and delivery of the Stadium LRT Station Upgrade, with \$28,340,000 of funding from Tax-Supported Debt and \$750,000 of funding from Pay-As-You-Go as follows:

2020 - \$750,000 Pay-As-You-Go and \$4,350,000 of Tax-Supported Debt

2021 - \$18,000,000 of Tax-Supported Debt

2022 - \$5,990,000 of Tax-Supported Debt

2019 Fall SCBA (CM.2): PTIF transfer between profiles: additional spend of \$1.7M due to an updated cost estimate on Stadium planning and design.

2019 Fall SCBA (CM.5): Work that had commenced under the profile for Stadium Station LRT Renewal (16-66-3212) is now being incorporated into the profile for Stadium LRT Station Upgrade (19-10-1011). This adjustment transfers \$69.5K (PTIF), \$25.8K (MSI), \$34.8K (Other Grants - Provincial) and \$8.9K (PAYG) funding from 16-66-3212 to 19-10-1011 to keep all expenditures and budget for the project under one profile.

2020 Spring SCBA (#20-11, BM-7) Funding transfer to cover 2019 overspend.

2020 Fall SCBA (#20-31, BM-4) Work that had commenced under the profile for Stadium Station LRT Renewal (16-66-3212) is now being incorporated into the profile for Stadium LRT Station Upgrade (19-10-1011). This adjustment transfers \$69.5K (PTIF), \$25.8K (MSI), \$34.8K (Other Grants - Provincial) and \$8.9K (PAYG) funding from 16-66-3212 to 19-10-1011 to keep all expenditures and budget for the project under one profile.

2020 Fall SCBA (#20-31, CFO 1D-5): To move Pay-As-You-Go funding for % for Art \$ (\$71,000) from 19-10-1011 Stadium Station to operating for the art payments that will be incurred in Fall 2020.

2021 Spring SCBA (#21-20, 3.3-1): This recosting adjustment is required due to the following: Increased construction and material costs due to COVID-19, and complex coordination on safety critical works around the operations that have led to further contingency required to manage this work to completion. In addition to this, unforeseen concourse roof repairs require approximately \$1M in additional funding that was not part of the original scope. The original approved budget for this project was based on the development report that underestimated traction power, communication, signal system, poor soil condition resulted in changing the location of the gantry columns which was not identified during the original scope. The overall recosting adjustment request is \$11,888,090, and would be funded with Federal Gas Tax funding.

2021 Spring SCBA (#21-21, CFO-11): The Public Transit Infrastructure Fund (PTIF) will be expiring this year. These adjustments are a result of the recalibration exercise completed to maximize federal and provincial funding, and to fund project shortfalls within several PTIF bundles (\$812K).

2021 Fall SCBA (#21-31, DCM-9): The recalibration exercise completed for this Public Transit Infrastructure Fund (PTIF) bundle in the Spring 2021 SCBA took excess \$1,025 budget from the Capital Line South 16-66-7018 and this correction entry is returning this budget back from the Stadium Station profile 19-10-1011 that received the majority of this PTIF bundle's excess funds in the Spring 2021 SCBA.

2021 Fall SCBA (#21-31, CFO-27): Additional funding of \$1,600,000 is required to complete the Stadium LRT Station Upgrade Project due to additional consultant fees, inclusion of legacy costs related to an earlier contract on the project. The Project has recently accommodated stakeholder requests to prioritize service for major events in August and September which has delayed various critical works and added schedule and cost to the Project. This SCBA request also includes allocation of overhead, additional contingency to account for cost of service impact to the operational station due to construction works, reduction in anticipated savings through value engineering exercises, the escalation of costs through the supply chain due to the pandemic, and subsequent supply shortages.

2021 Fall SCBA (#21-30, 3.5-1): This funding source adjustment is required in order to fully utilize Green-trip funding allocated to the City of Edmonton. Green-trip funding of \$31,024,958 is being transferred from the "08-66-1672 - NLRT (Downtown to NAIT)" capital profile to stand-alone capital profiles "19-10-1011 - Stadium LRT Station Upgrade" and "CM-66-3600 - Bus Fleet & Equipment Rehab & Replacement". In exchange, these two standalone profiles are transferring back Federal Gas Tax funding and Tax-supported debt to the NLRT (Downtown to NAIT) capital profile. There is \$0 net impact to all three capital profiles involved in this funding source adjustment.

CAPITAL PROFILE REPORT

Profile Page 4

PROFILE NAME: **Stadium LRT Station Upgrade**

PROFILE NUMBER: **19-10-1011**

BRANCH: **Infrastructure Planning & Design**

FUNDED

PROFILE TYPE: **Standalone**

CAPITAL BUDGET AND FUNDING SOURCES (000's)

	Prior Years	2021	2022	2023	2024	2025	2026	2027	2028	2029	Beyond 2029	Total
APPROVED BUDGET	Approved Budget											
	Original Budget Approved	1,500	10,000	16,000	-	-	-	-	-	-	-	27,500
	2019 Cap Administrative	1,839	-	-	-	-	-	-	-	-	-	1,839
	2019 Cap Council	4,350	8,000	-10,010	-	-	-	-	-	-	-	2,340
	2019 Cap Carry Forward	-	-	-	-	-	-	-	-	-	-	-
	2020 Cap Administrative	-71	-	-	-	-	-	-	-	-	-	-71
	2020 Cap Carry Forward	4,165	-4,165	-	-	-	-	-	-	-	-	-
	2021 Cap Administrative	-	2,411	-	-	-	-	-	-	-	-	2,411
	2021 Cap Council	-	11,880	-	-	-	-	-	-	-	-	11,880
	2021 Cap Capital Budget Adj (one-off)	-	-52	-71	-	-	-	-	-	-	-	-123
	Current Approved Budget	11,783	28,074	5,919	-	-	-	-	-	-	-	45,776
	Approved Funding Sources											
	Federal - Public Transit Infrastructure Fund	879	-	-	-	-	-	-	-	-	-	879
	Federal Gas Tax Fund	-	11,880	-	-	-	-	-	-	-	-	11,880
	Green-trip	-	26,672	-	-	-	-	-	-	-	-	26,672
	Munc Sustain. Initiative - MSI	273	-	-	-	-	-	-	-	-	-	273
	Other Grants - Provincial	584	-	-	-	-	-	-	-	-	-	584
	Pay-As-You-Go	222	3,669	-71	-	-	-	-	-	-	-	3,820
	Tax-Supported Debt	9,825	-14,147	5,990	-	-	-	-	-	-	-	1,668
	Current Approved Funding Sources	11,783	28,074	5,919	-	-	-	-	-	-	-	45,776

BUDGET REQUEST	Budget Request	-	-	-	-	-	-	-	-	-	-	-
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REVISED BUDGET (IF APPROVED)	Revised Budget (if Approved)	11,783	28,074	5,919	-	-	-	-	-	-	-	45,776
	Requested Funding Source											
	Federal - Public Transit Infrastructure Fund	879	-	-	-	-	-	-	-	-	-	879
	Federal Gas Tax Fund	-	11,880	-	-	-	-	-	-	-	-	11,880
	Green-trip	-	26,672	-	-	-	-	-	-	-	-	26,672
	Munc Sustain. Initiative - MSI	273	-	-	-	-	-	-	-	-	-	273
	Other Grants - Provincial	584	-	-	-	-	-	-	-	-	-	584
	Pay-As-You-Go	222	3,669	-71	-	-	-	-	-	-	-	3,820
	Tax-Supported Debt	9,825	-14,147	5,990	-	-	-	-	-	-	-	1,668
	Requested Funding Source	11,783	28,074	5,919	-	-	-	-	-	-	-	45,776

CAPITAL BUDGET BY ACTIVITY TYPE (000's)

	Activity Type	Prior Years	2021	2022	2023	2024	2025	2026	2027	2028	2029	Beyond 2029	Total
REVISED BUDGET (IF APPROVED)	Construction	9,194	28,074	5,919	-	-	-	-	-	-	-	-	43,187
	Design	2,589	-	-	-	-	-	-	-	-	-	-	2,589
	Total	11,783	28,074	5,919	-	-	-	-	-	-	-	-	45,776

OPERATING IMPACT OF CAPITAL

Type of Impact:

Branch:	Rev	Exp	Net	FTE	Rev	Exp	Net	FTE	Rev	Exp	Net	FTE	Rev	Exp	Net	FTE
Total Operating Impact	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

BYLAW 19977

A Bylaw to amend Bylaw 14880, as amended by Bylaws 15144, 15203 and 15408, Transportation Project, North Light Rail Transit

RECOMMENDATION

That Bylaw 19977 be given first reading.

Purpose

To amend Bylaw 14880 to increase the borrowing authority by \$27,172,000 from \$151,000,000 to \$178,172,000.

Readings

Bylaw 19977 is ready for first reading only.

Advertising and Signing

This Bylaw will be advertised in the Edmonton Journal on Thursday, February 24, 2022 and Thursday, March 3, 2022. The Bylaw cannot be signed and thereby passed prior to Monday, March 21, 2022.

Position of Administration

Administration supports this Bylaw.

Report Summary

This Bylaw amendment will increase the borrowing authority by \$27,172,000 from \$151,000,000 to \$178,172,000.

REPORT

The history of this borrowing bylaw is as follows:

- at the May 14, 2008 City Council meeting, Bylaw 14880 was passed;
- at the March 25, 2009 City Council meeting, Bylaw 15144, amending Bylaw 14480, was passed;
- at the July 8, 2009 City Council meeting, Bylaw 15203, amending Bylaws 14480 and 15144, was passed;

Bylaw 19977 - A Bylaw to amend Bylaw 14880, as amended by Bylaws 15144, 15203 and 15408, Transportation Project, North Light Rail Transit

- at the March 24, 2010 City Council meeting, Bylaw 15408, amending Bylaws 14480, 15144 and 15203, was passed.

During the 2021 Fall Supplemental Capital Budget Adjustment deliberations from November 30, to December 17, 2021, Council approved an increase in the tax-supported debt for profile 08-66-172 NLRT (Downtown to NAIT) of \$27,172,000, from \$151,000,000 to \$178,172,000.

In order to fully utilize Green-trip funding allocated to the City of Edmonton, a funding swap between the Stadium LRT station upgrade project (19-10-1011 Stadium LRT Station Upgrade) and Metro Line North LRT from Churchill to NAIT (08-66-1672 NLRT (Downtown to NAIT)) will occur with \$26,672,000 of tax supported debt transferred to the 08-66-1672 NLRT (Downtown to NAIT) capital profile in exchange for \$26,672,000 of Greentrip Funding transferred to 19-10-1011 Stadium LRT Station Upgrade. There is no cost increase, additional work, or change in scope to either of the projects as a result of this funding swap. This funding swap is strictly required to fully maximize provincial Green-trip funds.

A net increase of \$500,000 in tax-supported debt was also made to 08-66-1672 NLRT (Downtown to NAIT) capital profile that requires it to be updated in the borrowing bylaw.

As a result of these amendments the borrowing authority under this bylaw will need to be increased by \$27,172,000 from \$151,000,000 to \$178,172,000.

A corresponding amendment for the Green-trip funding swap will also be made to Bylaw 19164 Integrated Infrastructure Services Project, Stadium LRT Station Upgrade to increase the borrowing authority through Financial and Corporate Services report FCS01039, also being presented to City Council on February 22, 2022.

In accordance with section 258 of the *Municipal Government Act*, RSA 2000, c. M-26, where an increase to the original cost of the capital property exceeds 15 per cent then the borrowing bylaw must be advertised.

Bylaw 19977 will be resubmitted for second and third readings after the advertising and the expiration of the associated petition period.

COMMUNITY INSIGHTS

Borrowing bylaws reflect a legislative requirement of the borrowing process. As a result, no community insight is undertaken with respect to the borrowing bylaw process. Where required by the *Municipal Government Act*, borrowing bylaws are advertised.

ATTACHMENTS

1. Bylaw 19977
2. Bylaw 14880 Redline Version
3. Capital Profile 08-66-1672

Bylaw 19977 - A Bylaw to amend Bylaw 14880, as amended by Bylaws 15144, 15203 and 15408, Transportation Project, North Light Rail Transit

OTHERS REVIEWING THIS REPORT

- M. Plouffe, City Solicitor

CITY OF EDMONTON

BYLAW 19977

A Bylaw to amend Bylaw 14880, as amended by Bylaws 15144, 15203
and 15408, Transportation Project, North Light Rail Transit

WHEREAS:

- A. The Council of the City of Edmonton on May 14, 2008 duly passed Bylaw 14880, as amended by Bylaw 15144 duly passed on March 25, 2009, by Bylaw 15203 duly passed on July 8, 2009 and by Bylaw 15408 duly passed on March 24, 2010, authorizing the City of Edmonton to undertake, construct and finance Transportation Project, North Light Rail Transit ("Project"), and also authorizing the Mayor and Chief Administrative Officer to borrow the sum of \$151,000,000.00 for a period of twenty-five (25) years with the principal and interest to be repaid in semi-annual or annual instalments;
- B. The borrowing authority for the project will be increased by \$27,172,000.00 from \$151,000,000.00 to \$178,172,000.00. Furthermore, the total cost of the Project is now \$705,393,000 as a result of previously approved adjustments.

THEREFORE, THE COUNCIL OF THE CITY OF EDMONTON DULY ASSEMBLED
ENACTS AS FOLLOWS:

1. Bylaw 14880 is amended in the preamble, paragraph two, thereof by deleting the figure “\$161,000,000.00” as it appears and by substituting the figure “\$705,393,000.00”.
2. The said Bylaw is further amended in the preamble, paragraph four and in Sections (1) and (2), thereof by deleting the figure “\$151,000,000.00” as it appears and by substituting the figure “\$178,172,000.00”.
3. The said Bylaw is further amended in the preamble, paragraph five, thereof by deleting the words “2008 Capital Priorities Plan and 2009-2011 Capital Budget” as it appears and by substituting the words “2008 Capital Priorities Plan and 2009-2011, 2012-2014, 2015-2018 and 2019-2022 Capital Budgets”.
4. The said Bylaw is further amended in the preamble, paragraph seven, thereof by deleting the date “December 31, 2006” and the amount of “\$855,698,037.13” for the existing debt of the City of Edmonton as it appears and substituting the date “December 31, 2020” and the figure “\$3,407,145,492.13”.
5. The said Bylaw is further amended by replacing Schedule “A” with Schedule “A” as attached.

6. This Bylaw shall take effect on the day of the final passing thereof.

READ a first time this	day of	2022;
READ a second time this	day of	2022;
READ a third time this	day of	2022;
SIGNED AND PASSED this	day of	2022.

THE CITY OF EDMONTON

.....
MAYOR

.....
CITY CLERK

Schedule "A"

Transportation Project, North Light Rail Transit
25 Years
(in thousands of dollars)

Project Number	Project Name	Estimated Total Cost	Federal Grants	Green-Trip	Financial Stabilization Reserve	Other Reserve	Other	Borrowing Request	2021 and Prior Years	2022
08-66-1672	NLRT (Downtown To Nait)	\$ 705,393	\$ 104,353	\$ 405,642	\$ 5,000	\$ 11,281	\$ 945	\$ 178,172	\$ 178,172	\$ -
		<u>\$ 705,393</u>	<u>\$ 104,353</u>	<u>\$ 405,642</u>	<u>\$ 5,000</u>	<u>\$ 11,281</u>	<u>\$ 945</u>	<u>\$ 178,172</u>	<u>\$ 178,172</u>	<u>\$ -</u>

CITY OF EDMONTON

BYLAW 14880

A Bylaw to authorize the City of Edmonton to undertake, construct, and
finance Transportation Project, North Light Rail Transit

WHEREAS:

The Council of the City of Edmonton has decided to issue a bylaw pursuant to Sections 251 and 258 of the *Municipal Government Act*, R.S.A. 2000, c. M-26 to authorize the City of Edmonton to undertake, complete, and finance Transportation Project, North Light Rail Transit ("Project");

The City of Edmonton has made plans, specifications and estimates for the said Project and confirms the total cost of the said Project is ~~\$161,000,000.00~~ **\$705,393,000.00**;

The City of Edmonton has estimated the following grants or contributions will be received or applied to the said Project as detailed in Schedule "A";

In order to construct and complete the said Project, it will be necessary for the City of Edmonton to borrow the sum of ~~\$151,000,000.00~~ **\$178,172,000.00** for the terms and conditions referred to in this bylaw;

The above expenditure was approved by the City of Edmonton in its estimate of capital expenditures through the 2008 Capital Priorities Plan and 2009-2011, 2012-2014, 2015-2018 and 2019-2022 Capital Budgets ~~2008 Capital Priorities Plan and 2009-2011 Capital Budget;~~

The City of Edmonton will repay the indebtedness over a period of up to and including twenty-five (25) years in semi-annual or annual instalments, with interest not exceeding nine per cent (9%), per annum;

The amount of the existing debenture debt of the City of Edmonton at ~~December 31, 2020~~ December 31, 2006 is ~~\$3,407,145,492.13~~ \$855,698,037.13, no part of which is in arrears;

The probable lifetime of the said Project is a minimum of twenty-five (25) years;

All required approvals for the said Project will be obtained and the Project is in compliance with all Acts and Regulations of the Province of Alberta;

THEREFORE, THE COUNCIL OF THE CITY OF EDMONTON DULY ASSEMBLED ENACTS AS FOLLOWS:

1. That for the purpose of said Project the sum of ~~\$178,172,000.00~~ \$151,000,000.00 be borrowed by way of debenture on the credit and security of the City of Edmonton at large.
2. The debentures to be issued under this bylaw shall not exceed the sum of ~~\$178,172,000.00~~ \$151,000,000.00, and may be in any denomination not exceeding the amount authorized by this bylaw and shall be dated having regard to the date of the borrowing.

3. The debentures shall bear interest during the currency of the debentures, at a rate not exceeding nine per cent (9%), per annum, payable semi-annually or annually.

4. The debentures shall be issued for a period of up to and including twenty-five (25) years and the City of Edmonton will repay the principal and the interest in semi-annual or annual instalments.

5. The debentures shall be payable in lawful money of Canada at the principal office of the Toronto-Dominion Bank either in the City of Edmonton, in the Province of Alberta, or at its principal office in the City of Toronto, in the Province of Ontario.

6. For the purpose of this bylaw, the Chief Elected Official (as defined by the *Municipal Government Act*) means the Mayor, and the Chief Administrative Officer (as defined by the *Municipal Government Act*) means the City Manager, of the City of Edmonton. The Mayor and the City Manager shall authorize such bank or financial institution to make payments to the holder of the debentures, on such date and in such amounts as specified in the repayment schedule forming part of each debenture.

7. The debentures shall be signed by the Mayor and the City Manager of the City of Edmonton and the City Manager shall affix thereto the corporate seal of the City of Edmonton to the debentures.

8. There shall be levied and raised in each year of the currency of the debentures a rate or rates, sufficient to pay the principal and interest falling due in such year on such debentures by a

rate sufficient therefore on all the taxable property in the City and collectible at the same time and in the same manner as other rates.

9. The indebtedness is contracted on the credit and security of the City of Edmonton at large.

10. The net amount realized by the issue and sale of debentures authorized under this bylaw shall be applied only for the purposes for which the indebtedness was created.

11. This bylaw shall take effect on the day of the final passing thereof.

Bylaw 14880 passed by Council May 14, 2008

Amendments:

Bylaw 15144, March 25, 2009

Bylaw 15203, July 8, 2009

Bylaw 15408, March 24, 2010

Schedule "A"

**Transportation Project
North Light Rail Transit**

(in thousands of dollars)



<u>Project Name</u>	<u>Estimated Total Cost</u>	<u>Other LRT Reser</u>	<u>Building Res</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>	<u>2012</u>
08-66-1672 North Light Rail Transit (NLRT) Phase I	\$ 45,000	\$ 10,000	\$ 35,000	\$ 32,000	\$ 3,000	-	-	-
North Light Rail Transit (NLRT) Phase II	95,000	-	95,000	-	36,660	43,330	10,010	5,000
North Light Rail Transit (NLRT) Phase III	<u>21,000</u>	<u>-</u>	<u>21,000</u>	<u>-</u>	<u>-</u>	<u>21,000</u>	<u>-</u>	<u>-</u>
	<u>\$ 161,000</u>	<u>\$ 10,000</u>	<u>\$ 151,000</u>	<u>\$ 32,000</u>	<u>\$ 39,660</u>	<u>\$ 64,330</u>	<u>\$ 10,010</u>	<u>\$ 5,000</u>

Schedule "A"

Transportation Project, North Light Rail Transit
25 Years
(in thousands of dollars)

Project Number	Project Name	Estimated Total Cost	Federal Grants	Green-Trip	Financial Stabilization Reserve	Other Reserve	Other	Borrowing Request	2021 and Prior Years	2022
08-66-1672	NLRT (Downtown To Nait)	\$ 705,393	\$ 104,353	\$ 405,642	\$ 5,000	\$ 11,281	\$ 945	\$ 178,172	\$ 178,172	\$ -
		<u>\$ 705,393</u>	<u>\$ 104,353</u>	<u>\$ 405,642</u>	<u>\$ 5,000</u>	<u>\$ 11,281</u>	<u>\$ 945</u>	<u>\$ 178,172</u>	<u>\$ 178,172</u>	<u>\$ -</u>

CAPITAL PROFILE REPORT

PROFILE NAME: **NLRT (DOWNTOWN TO NAIT)**
 PROFILE NUMBER: **08-66-1672**
 DEPARTMENT: **Integrated Infrastructure Services**
 LEAD BRANCH: **LRT Expansion & Renewal**
 PROGRAM NAME:
 PARTNER: **Edmonton Transit Service**
 BUDGET CYCLE: **2008**

FUNDED

PROFILE STAGE: **Approved**
 PROFILE TYPE: **Standalone**
 LEAD MANAGER: **Bruce Ferguson**
 PARTNER MANAGER: **Eddie Robar**
 ESTIMATED START: **January, 2008**
 ESTIMATED COMPLETION: **December, 2020**

Service Category: **Public Transit**

Major Initiative:

GROWTH
100

RENEWAL

PREVIOUSLY APPROVED: **705,393**
 BUDGET REQUEST: **-**
 TOTAL PROFILE BUDGET: **705,393**

PROFILE DESCRIPTION

This project provides funding for detailed design, land acquisition, and construction of the North LRT extension from Churchill Station to NAIT. Included in this project is the purchase of 20 light rail vehicles, construction of the cut and cover concrete tunnel under the Qualico Development and tunnel to connect to Churchill Station, 3 LRT Stations (MacEwan, Kingsway/Royal Alex, NAIT), one bus transit centre (Kingsway), all track, communications systems, train control signal system, traction power system, land and related road work and utility relocations.

The construction schedule is as follows:

2009 Preliminary and detailed design, commence land acquisition, utility relocations, commence tunnelling from Churchill to MacEwan, order LRVs
 2010 Detailed design, tunnelling from Churchill to MacEwan, complete land acquisition
 2011 Tunnelling from Churchill to MacEwan, commence construction from MacEwan to NAIT
 2012 Complete tunneling from Churchill to MacEwan, continue construction from MacEwan to NAIT
 2013 Complete construction, delivery of LRV's, commissioning
 2014 Open for service

The LRT line is expected to be operational for a 75-100 year period. Various equipment, structures, and assets in facilities and along the right of way will have design life ranging from 10 to 50 years. Design life for the light rail vehicles is 35 years.

Funding for Concept Planning and Preliminary Engineering is in Transportation Department Program 05-66-1665. Funding for limited opportunity land purchases is also in program 05-66-1665.

Subject to receiving Green Trip funds, which requires that the City funds 1/3 of the Project.

An additional 10 LRVs were added to the project 2012 Spring SBA:

#34: Recognize the availability of rental revenue as a source of financing in 2011 totalling \$74K.

Spring SBA: #11-34 Recognize the use of Rental Revenue in 2010.

Fall SBA: #11-88: Cashflow \$25,000k due to a slower than anticipated construction startup, which was related to contractor staffing issues.

PROFILE JUSTIFICATION

Extending the LRT to NAIT meets the objectives of the Transportation Master Plan and the approved LRT NAIT alignment bylaw approved by Council.

The project supports Council's goal of Shifting Edmonton's Transportation Mode with increasing the use of Transit by the citizens.

CHANGES TO APPROVED PROFILE

2015 Spring SCBA (CA#20): (2.5.14) To recognize Developer Funding received.

2016 Spring SCBA (#16-20-2.5): To Add budget for additional Developer funds received.

2016 Spring SCBA (#16-20-2.6): Transfer of funding is required for Arena / LRT Interface works for landscaping and 105 Avenue roadway development.

2016 Fall SCBA (AA#41): (CM.7) Budget was moved in the Spring SCBA to support work around the LRT in the area of 104 - 105 Avenue. These additional funds are no longer required.

Spring SCBA 2018: (2.4-23) To recognize Developer Funding \$28,162 Received in 2017

July 10, 2018 Council Meeting (#18-09): Budget adjustment to increase funding by \$34.5 million, provided by tax-supported debt to pursue the recommended approach outlined in July 10, 2018 – Integrated Infrastructure Services CR_6157. The \$34.5 million will bring the total budget for capital profile 08-66-1672 to \$700.4 million.

2021 Fall SCBA (#21-30, 3.5-1): This funding source adjustment is required in order to fully utilize Green-trip funding allocated to the City of Edmonton. Green-trip funding of \$31,024,958 is being transferred from the "08-66-1672 - NLRT (Downtown to NAIT)" capital profile to stand-alone capital profiles "19-10-1011 - Stadium LRT Station Upgrade" and "CM-66-3600 - Bus Fleet & Equipment Rehab & Replacement". In exchange, these two standalone profiles are transferring back Federal Gas Tax funding and Tax-supported debt to the NLRT (Downtown to NAIT) capital profile. There is \$0 net impact to all three capital profiles involved in this funding source adjustment.

2021 Fall SCBA (#21-30, 3.5-2): This funding source adjustment is required to decrease the Green-trip funding and increase the LRT Reserve funding by \$244,383 in the "08-66-1672 - NLRT (Downtown to NAIT)" capital profile. This adjustment is required to match the province's records of the Green-trip grant amount for the profile.

CAPITAL PROFILE REPORT

Profile Page 3

PROFILE NAME: **NLRT (Downtown to NAIT)**

PROFILE NUMBER: **08-66-1672**

BRANCH: **LRT Expansion & Renewal**

FUNDED

PROFILE TYPE: **Standalone**

CAPITAL BUDGET AND FUNDING SOURCES (000's)

	Prior Years	2021	2022	2023	2024	2025	2026	2027	2028	2029	Beyond 2029	Total
APPROVED BUDGET	Approved Budget											
	Original Budget Approved	927,970	-	-	-	-	-	-	-	-	-	927,970
	2008 CBS Budget Adjustment	2,987	-	-	-	-	-	-	-	-	-	2,987
	2009 CBS Budget Adjustment	-4,027	-	-	-	-	-	-	-	-	-	-4,027
	2010 CBS Budget Adjustment	-105,609	-	-	-	-	-	-	-	-	-	-105,609
	2011 CBS Budget Adjustment	-49,130	-	-	-	-	-	-	-	-	-	-49,130
	2012 CBS Budget Adjustment	-106,797	-	-	-	-	-	-	-	-	-	-106,797
	2013 Cap Carry Forward	-	-	-	-	-	-	-	-	-	-	-
	2013 CBS Budget Adjustment	89,568	-	-	-	-	-	-	-	-	-	89,568
	2014 Cap Capital Budget Adj (one-off)	-89,634	-	-	-	-	-	-	-	-	-	-89,634
	2014 Cap Carry Forward	-	-	-	-	-	-	-	-	-	-	-
	2014 SCBA >\$1MM or New	-53	-	-	-	-	-	-	-	-	-	-53
	2014 SCBA Within Dept <\$250K	53	-	-	-	-	-	-	-	-	-	53
	2015 Cap Council	517	-	-	-	-	-	-	-	-	-	517
	2015 Cap Carry Forward	-	-	-	-	-	-	-	-	-	-	-
	2016 Cap Administrative	-605	-	-	-	-	-	-	-	-	-	-605
	2016 Cap Council	626	-	-	-	-	-	-	-	-	-	626
	2016 Cap Capital Budget Adj (one-off)	-	-	-	-	-	-	-	-	-	-	-
	2016 Cap Carry Forward	-	-	-	-	-	-	-	-	-	-	-
	2017 Cap Carry Forward	-	-	-	-	-	-	-	-	-	-	-
	2018 Cap Council	28	-	-	-	-	-	-	-	-	-	28
	2018 Cap Capital Budget Adj (one-off)	34,500	-	-	-	-	-	-	-	-	-	34,500
	2018 Cap Carry Forward	-	-	-	-	-	-	-	-	-	-	-
	2019 Cap Carry Forward	-	-	-	-	-	-	-	-	-	-	-
	2020 Cap Capital Budget Adj (one-off)	5,000	-	-	-	-	-	-	-	-	-	5,000
	2020 Cap Carry Forward	-10,589	10,589	-	-	-	-	-	-	-	-	-
	2021 Cap Council	-	-	-	-	-	-	-	-	-	-	-
	Current Approved Budget	694,804	10,589	-	-	-	-	-	-	-	-	705,393
APPROVED FUNDING SOURCES	Approved Funding Sources											
	Developer Financing	721	-	-	-	-	-	-	-	-	-	721
	Federal Bldg Canada Fund	100,000	-	-	-	-	-	-	-	-	-	100,000
	Federal Gas Tax Fund	-	4,353	-	-	-	-	-	-	-	-	4,353
	Financial Stabilization Resrv.	-	5,000	-	-	-	-	-	-	-	-	5,000
	Green-trip	440,928	-35,286	-	-	-	-	-	-	-	-	405,642
	LRT Reserve	-	1,281	-	-	-	-	-	-	-	-	1,281
	Munc Sustain. Initiative - MSI	-	-	-	-	-	-	-	-	-	-	-
	Other	224	-	-	-	-	-	-	-	-	-	224
	Other Reserve	10,000	-	-	-	-	-	-	-	-	-	10,000
	Pay-As-You-Go	-	-	-	-	-	-	-	-	-	-	-
	Tax-Supported Debt	142,931	35,241	-	-	-	-	-	-	-	-	178,172
	Current Approved Funding Sources	694,804	10,589	-	-	-	-	-	-	-	-	705,393

BUDGET REQUEST	Budget Request	-	-	-	-	-	-	-	-	-	-	-
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REVISED BUDGET (IF APPROVED)	Revised Budget (if Approved)	694,804	10,589	-	-	-	-	-	-	-	-	705,393
	Requested Funding Source											
	Developer Financing	721	-	-	-	-	-	-	-	-	-	721
	Federal Bldg Canada Fund	100,000	-	-	-	-	-	-	-	-	-	100,000
	Federal Gas Tax Fund	-	4,353	-	-	-	-	-	-	-	-	4,353
	Financial Stabilization Resrv.	-	5,000	-	-	-	-	-	-	-	-	5,000
	Green-trip	440,928	-35,286	-	-	-	-	-	-	-	-	405,642
	LRT Reserve	-	1,281	-	-	-	-	-	-	-	-	1,281
	Munc Sustain. Initiative - MSI	-	-	-	-	-	-	-	-	-	-	-

CAPITAL PROFILE REPORT

Profile Page 4

REVISED BUDGET (IF APPROVED)	Other	224	-	-	-	-	-	-	-	-	-	-	224
	Other Reserve	10,000	-	-	-	-	-	-	-	-	-	-	10,000
	Pay-As-You-Go	-	-	-	-	-	-	-	-	-	-	-	-
	Tax-Supported Debt	142,931	35,241	-	-	-	-	-	-	-	-	-	178,172
	Requested Funding Source	694,804	10,589	-	-	-	-	-	-	-	-	-	705,393

CAPITAL BUDGET BY ACTIVITY TYPE (000's)

REVISED BUDGET (IF APPROVED)	Activity Type	Prior Years	2021	2022	2023	2024	2025	2026	2027	2028	2029	Beyond 2029	Total
	Construction	-65,211	10,589	-	-	-	-	-	-	-	-	-	-54,622
	Other Costs	760,015	-	-	-	-	-	-	-	-	-	-	760,015
	Total	694,804	10,589	-	-	-	-	-	-	-	-	-	705,393

OPERATING IMPACT OF CAPITAL

Type of Impact:

Branch:																
	Rev	Exp	Net	FTE	Rev	Exp	Net	FTE	Rev	Exp	Net	FTE	Rev	Exp	Net	FTE
Total Operating Impact	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

BYLAW 19999

A Bylaw to authorize the City of Edmonton to undertake, construct and finance Integrated Infrastructure Services Project, Peter Hemingway Fitness & Leisure Centre Rehabilitation - Phase I

RECOMMENDATION

That Bylaw 19999 be given first reading.

Purpose

To authorize the City of Edmonton to borrow the sum of \$6,252,000 to undertake, construct and finance Integrated Infrastructure Services Project, Peter Hemingway Fitness & Leisure Centre Rehabilitation - Phase I.

Readings

Bylaw 19999 is ready for first reading only.

Advertising and Signing

This Bylaw will be advertised in the Edmonton Journal on Thursday, February 24, 2022 and Thursday, March 3, 2022. The Bylaw cannot be signed and thereby passed prior to Monday, March 21, 2022.

Position of Administration

Administration supports this Bylaw.

Report Summary

This Bylaw provides debt financing for Integrated Infrastructure Services Project, Peter Hemingway Fitness & Leisure Centre Rehabilitation - Phase I.

REPORT

Through the Fall Supplemental Capital Budget Adjustment report (FCS00818, November 30 City Council meeting), Administration proposed that a new capital profile be established for Peter Hemingway Fitness & Leisure Centre Rehabilitation - Phase 1 (21-12-0310), with a total project budget of \$10,490,000 within the 2019-2022 capital budget. The profile was required as the

Bylaw 19999 - A Bylaw to authorize the City of Edmonton to undertake, construct and finance Integrated Infrastructure Services Project, Peter Hemingway Fitness & Leisure Centre Rehabilitation - Phase I

project had reached Checkpoint 3 of the Project Development and Delivery Model (PDDM) and required approval for delivery within a new stand-alone profile. The proposed funding for the project was reallocation of Municipal Sustainability Initiative (MSI) grant funding and Pay-As-You-Go (PAYGO) from the existing approved composite profiles.

During the 2021 Fall Supplemental Capital Budget Adjustment budget deliberations from November 30, 2021 to December 17, 2021, Council passed a motion to swap the funding source for this project from MSI and PAYGO to tax-supported debt, in order to release MSI and PAYGO funding to the corporate capital pool to be available for other priorities.

Upon further review, Administration determined that the cost incurred for the demolition and abatement work on the project which began in late summer of 2021 were not eligible for tax-supported debt. The total cost of this work is \$4.24 million and was funded under the composite profile CM-12-0000 Facility: Service Delivery - Renewal using MSI and PAYGO. Under the *Municipal Government Act*, a municipality may not borrow funds for a project where construction has already begun.

As a result, and in order to still leverage debt for this project as intended by Council's motion during the fall 2021 budget deliberations, Administration will fund this project as follows:

- Demolition and abatement for work currently underway that will be funded by MSI and PAYGO (\$4.24 million)
- Phase I upgrades to mechanical and structural components within the facility to be funded by tax-supported debt (\$6.25 million)

To complete 21-12-0310 Peter Hemingway Fitness & Leisure Centre Rehabilitation - Phase I it will be necessary to borrow \$6,252,000. The capital profile, included as Attachment 2, to this report will be updated to reflect the project cost of \$6.25 million for the upgrades to mechanical and structural components within the facility, with funding through tax-supported debt.

Bylaw 19999 will be resubmitted for second and third readings after the advertising and the expiration of the associated petition period.

As a result of the change in the amount of tax-supported debt applied to this project, \$4.24 million less MSI and PAYGO funding will be available in the corporate pool. The lower corporate pool funding balance will not impact any of the projects currently approved with funding from PAYGO or MSI. Administration is currently updating the corporate pool balance for year-end capital project releases and 2021 investment earnings and will provide Council with an update on balance through the Spring 2022 Supplemental Capital Budget Adjustment report in May or June.

COMMUNITY INSIGHTS

Borrowing bylaws reflect a legislative requirement of the borrowing process. As a result, no community insight is undertaken with respect to the borrowing bylaw process. Where required by the *Municipal Government Act*, borrowing bylaws are advertised.

Bylaw 19999 - A Bylaw to authorize the City of Edmonton to undertake, construct and finance Integrated Infrastructure Services Project, Peter Hemingway Fitness & Leisure Centre Rehabilitation - Phase I

ATTACHMENTS

1. Bylaw 19999
2. Capital Profile 21-12-0310

OTHERS REVIEWING THIS REPORT

- M. Plouffe, City Solicitor

CITY OF EDMONTON

BYLAW 19999

Bylaw 19999 to authorize the City of Edmonton to undertake,
construct and finance Integrated Infrastructure Services Project,
Peter Hemingway Fitness & Leisure Centre Rehabilitation - Phase I

WHEREAS:

- A. The Council of the City of Edmonton has decided to issue a bylaw pursuant to Sections 251 and 258 of the *Municipal Government Act*, R.S.A. 2000, c. M-26, to authorize the City of Edmonton to undertake, construct and finance Integrated Infrastructure Services Project, Peter Hemingway Fitness & Leisure Centre Rehabilitation - Phase I (the “Project”);
- B. The City of Edmonton has made plans, specifications and estimates for the said Project and confirms the total cost of the said Project is \$6,252,000.00;
- C. There are no grants or contributions to be received or applied to the said Project;

- D. In order to construct and complete the said Project, it will be necessary for the City of Edmonton to borrow the sum of \$6,252,000.00 for the terms and conditions referred to in this bylaw and as detailed in Schedule “A”;
- E. The above expenditure was approved by the City of Edmonton in its estimate of capital expenditures through the 2019 - 2022 Capital Budget;
- F. The City of Edmonton will repay the indebtedness over a period of twenty-five (25) years in semi-annual or annual instalments, with interest not exceeding nine per cent (9%) per annum;
- G. The amount of the existing debenture debt of the City of Edmonton on December 31, 2020 is \$3,407,145,492.13 as calculated in accordance with the *Debt Limit Regulation*, A.R. 255/2000, as amended, no part of which is in arrears;
- H. The probable lifetime of the Project is a minimum of twenty-five (25) years;
- I. All required approvals for the Project have been obtained and the Project is in compliance with all Acts and Regulations of the Province of Alberta;

THEREFORE, THE COUNCIL OF THE CITY OF EDMONTON DULY ASSEMBLED
ENACTS AS FOLLOWS:

1. That for the purpose of said Project, the sum of \$6,252,000.00 will be borrowed by way of debenture on the credit and security of the City of Edmonton at large.

2. The debentures to be issued under this Bylaw shall not exceed the sum of \$6,252,000.00, and may be in any denomination not exceeding the amount authorized by this Bylaw and shall be dated having regard to the date of the borrowing.
3. The debentures shall bear interest during the currency of the debentures, at a rate not exceeding nine per cent (9%) per annum, payable semi-annually or annually.
4. The debentures shall be issued for a period of up to twenty-five (25) years and the City of Edmonton will repay the principal and interest in semi-annual or annual instalments.
5. For the purpose of this Bylaw, the Chief Elected Official (as defined by the *Municipal Government Act*) means the Mayor, and the Chief Administrative Officer (as defined by the *Municipal Government Act*) means the City Manager of the City of Edmonton. The Mayor and the City Manager shall authorize such bank or financial institution to make payments to the holder of the debentures, on such date and in such amounts as specified in the repayment schedule forming part of each debenture.
6. The debentures shall be signed by the Mayor and the City Manager of the City of Edmonton and the City Manager shall affix thereto the corporate seal of the City of Edmonton to the debentures.
7. There shall be levied and raised in each year of the currency of the debentures a rate or rates, in an amount sufficient to pay the principal and interest falling due in such year on such debentures by a rate sufficient therefore on all the taxable property in the City and collectible at the same time and in the same manner as other rates.

8. The indebtedness is contracted on the credit and security of the City of Edmonton at large.
9. The net amount realized by the issue and sale of debentures authorized under this Bylaw shall be applied only for the purposes for which the indebtedness was created.
10. This Bylaw shall take effect on the day of the final passing thereof.

READ a first time this	day of	2022;
READ a second time this	day of	2022;
READ a third time this	day of	2022;
SIGNED AND PASSED this	day of	2022.

THE CITY OF EDMONTON

.....

MAYOR

.....

CITY CLERK

Schedule "A"

**Integrated Infrastructure Services Project,
Peter Hemingway Fitness & Leisure Centre Rehabilitation - Phase I
25 Years
(in thousands of dollars)**

Project Number	Project Name	Estimated Total Cost		Borrowing Request		2022		2023	
21-12-0310	Peter Hemingway Fitness & Leisure Centre Rehabilitation - Phase I	\$	6,252	\$	6,252	\$	5,667	\$	585
		\$	6,252	\$	6,252	\$	5,667	\$	585

CAPITAL PROFILE REPORT

PROFILE NAME:	PETER HEMINGWAY FITNESS & LEISURE CENTRE REHABILITATION - PHASE 1	FUNDED
PROFILE NUMBER:	21-12-0310	PROFILE STAGE: Approved
DEPARTMENT:	Integrated Infrastructure Services	PROFILE TYPE: Standalone
LEAD BRANCH:	Infrastructure Delivery	LEAD MANAGER: Jason Meliefste
PROGRAM NAME:		PARTNER MANAGER: Pascale Ladouceur
PARTNER:	Infrastructure Planning & Design	ESTIMATED START: December, 2021
BUDGET CYCLE:	2019-2022	ESTIMATED COMPLETION: March, 2023

Service Category:		Major Initiative:	
GROWTH	RENEWAL	PREVIOUSLY APPROVED:	10,490
4	96	BUDGET REQUEST:	-
		TOTAL PROFILE BUDGET:	10,490

PROFILE DESCRIPTION

The primary objective of the Peter Hemingway Fitness & Leisure Centre Rehabilitation project is to rehabilitate the aquatic facility, which has been an iconic architectural and recreation destination since 1971. The rehabilitation goals are to make the facility more energy efficient, code & safety compliant, extend the building life expectancy, as well as improve the user experience.

The project includes the investigation, design, and construction to implement repairs and lifecycle replacements of mechanical, electrical, civil, landscape and architectural finishes of the facility.

This rehabilitation project has been split into 2 phases, this profile represents phase 1 of the project. Phase 1 includes full design of all rehabilitation scopes of work and the construction of critical scopes to be addressed in the current budget cycle. Phase 2 includes construction of rehabilitation scopes not addressed in the current budget cycle.

Phase 1 critical scopes of work includes 2 items: 1) Replacement of the boiler system - changing from steam to hydronic and downstream adjustments are required throughout the heating system to accommodate the hydronic system. 2) Replacement of the pool basin tiles which carries interdependencies of anti-entrapment, bonding, perimeter drainage, pool deck drainage, and the control joint replacement.

PROFILE BACKGROUND

The City's Infrastructure Asset Management Policy guides the overall framework for asset management which includes the Infrastructure Strategy and the development of asset management plans. Managing the lifecycle of infrastructure assets is an important part of asset management in supporting the City's core service delivery.

Facility Renewal Service Delivery composite (CM-12-0000), managed by Lifecycle Management, funds capital rehabilitation projects that include upgrades to and replacement of major components within the architectural, structural, mechanical, and electrical systems of each facility. Based on building condition assessment reports and feedback from Community & Recreation Facilities, it was found that the performance of the facility is declining due to aging, wear and tear of systems and components, and a variety of other factors. As a result, Lifecycle Management identified this facility as one of the high priority facilities that requires a major rehabilitation project during the 2019-2022 budget cycle.

Aligning with the capital budget guidelines, the creation of a stand alone profile was required for rehabilitation projects valued over \$5M

PROFILE JUSTIFICATION

As facilities age, there is a need to rehabilitate or replace various components to maximize the life of the facility, to provide a safe environment for staff and the general public and to meet the current service needs of citizens.

Since most facilities will still be in use for the next 20 to 30 years, the primary methods for meeting those goals will be through efficient operation, maintenance, repair, renew, and energy retrofitting of existing facilities. The objective is to maximize benefits, manage risk and provide satisfactory levels of service to the community in a sustainable manner.

STRATEGIC ALIGNMENT

This profile aligns with the strategic objective of making transformational impacts in our community by making discrete and measurable impacts on Council's four strategic goals: healthy city, urban shift, regional economic prosperity, and energy and climate. This project focuses on the health city strategic goal.

ALTERNATIVES CONSIDERED

The alternate to a deliberate rehabilitation program is to carry out replacements of components as they fail using operating funds. This is considered to be the highest cost alternative to facility maintenance by industry.

The second alternative would be to complete the project in a single phase, however given the extensive amount of work to be completed in the building, and the other priorities for the renewal composite, this approach would take funds from other facility renewal projects.

COST BENEFITS

Tangible Benefits: Improved reliability, enhanced energy efficiency, improved productivity, and the improvement of level of service.

Intangible Benefits: Customer satisfaction and improved public image.

KEY RISKS & MITIGATING STRATEGY

As this facility deteriorates, its components and systems age and will fail. Failure of these systems poses various risks on the staff and users of the facility and the lack of rehabilitation activities can lead to unplanned breakdowns resulting in loss of time/income within the operations and/or the closure of the facility impacting citizens.

A risk management plan follows the steps for risk control, risk register, and assumptions/constraints as outlined in the City's Project Management procedures. The plan outlines the processes used for risk identification, quantitative and qualitative risk analysis. A robust risk register has been created and is monitored during regular project team meetings.

RESOURCES

The project aligns with the Project Develop and Delivery Model with City Project Managers assigned to lead each of the project phases and its team. The project is supported by a Prime Design Consultant, a Construction Manager both procured through existing standing arrangements.

CONCLUSIONS AND RECOMMENDATIONS

The rehabilitation will allow the facility to continue to operate for many years to come. Lifecycle Management identified the facility as a priority for rehabilitation of its mechanical and electrical systems. Funding for rehabilitation work has been approved under the rehabilitation composite. The development of a standalone profile aligns with the capital budget guidelines for rehabilitations over \$5 million.

Investment in asset management, maintenance, and rehabilitation is a cost-effective method of maximizing the life of facilities to ensure a high level of service is provided to its citizens. This funding level will limit the decline of assets in poor and very poor condition.

CAPITAL PROFILE REPORT

Profile Page 3

PROFILE NAME: Peter Hemingway Fitness & Leisure Centre Rehabilitation - Phase 1

FUNDED

PROFILE NUMBER: 21-12-0310

PROFILE TYPE: Standalone

BRANCH: Infrastructure Delivery

CAPITAL BUDGET AND FUNDING SOURCES (000's)

	Prior Years	2021	2022	2023	2024	2025	2026	2027	2028	2029	Beyond 2029	Total
APPROVED BUDGET	Approved Budget											
	Original Budget Approved	-	-	-	-	-	-	-	-	-	-	-
	2021 Cap Council	-	4,643	5,263	585	-	-	-	-	-	-	10,490
	Current Approved Budget	-	4,643	5,263	585	-	-	-	-	-	-	10,490
	Approved Funding Sources											
	Tax-Supported Debt	-	4,643	5,263	585	-	-	-	-	-	-	10,490
	Current Approved Funding Sources	-	4,643	5,263	585	-	-	-	-	-	-	10,490

BUDGET REQUEST	Budget Request	-	-	-	-	-	-	-	-	-	-	-
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REVISED BUDGET (IF APPROVED)	Revised Budget (if Approved)	-	4,643	5,263	585	-	-	-	-	-	-	10,490
	Requested Funding Source											
	Tax-Supported Debt	-	4,643	5,263	585	-	-	-	-	-	-	10,490
	Requested Funding Source	-	4,643	5,263	585	-	-	-	-	-	-	10,490

CAPITAL BUDGET BY ACTIVITY TYPE (000's)

	Activity Type	Prior Years	2021	2022	2023	2024	2025	2026	2027	2028	2029	Beyond 2029	Total
REVISED BUDGET (IF APPROVED)	Construction	-	2,553	4,737	389	-	-	-	-	-	-	-	7,679
	Contingency	-	-	-	117	-	-	-	-	-	-	-	117
	Design	-	2,089	526	58	-	-	-	-	-	-	-	2,674
	Other Costs	-	-	-	20	-	-	-	-	-	-	-	20
	Total	-	4,643	5,263	585	-	-	-	-	-	-	-	10,490

OPERATING IMPACT OF CAPITAL

Type of Impact:

Branch:																
	Rev	Exp	Net	FTE	Rev	Exp	Net	FTE	Rev	Exp	Net	FTE	Rev	Exp	Net	FTE
Total Operating Impact	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

BYLAW 19948

A Bylaw to amend Bylaw 18062, to authorize the City of Edmonton to undertake, construct and finance Coronation Community Recreation Centre

RECOMMENDATION

That Bylaw 19948 be given the appropriate readings.

Purpose

To amend Bylaw 18062, to increase the borrowing authority by \$41,150,000 from \$107,260,000 to \$148,410,000.

Readings

Bylaw 19948 is ready for the appropriate readings.

Advertising and Signing

This Bylaw was advertised in the Edmonton Journal on Thursday, January 27, 2022 and Thursday, February 3, 2022. The Bylaw cannot be signed and thereby passed prior to Tuesday, February, 22, 2022.

Position of Administration

Administration supports this Bylaw.

Report Summary

This Bylaw amendment will increase the borrowing authority by \$41,150,000 from \$107,260,000 to \$148,410,000.

REPORT

At the January 24, 2022 City Council meeting, Bylaw 19948, amending Bylaw 18062, received first reading.

The petition period expired on Friday, February 18, 2022. No petitions were received, so this Bylaw may proceed.

Bylaw 19948 - A Bylaw to amend Bylaw 18062, to authorize the City of Edmonton to undertake, construct and finance Coronation Community Recreation Centre

During the 2021 Fall Supplemental Capital Budget Adjustment deliberations on December 17, 2021, Council approved an increase of \$41,150,000 to profile 15-21-5801 Coronation Park Sports and Recreation Centre. As a result, this bylaw amendment will increase the borrowing authority by \$41,150,000 from \$107,260,000 to \$148,410,000. In accordance with section 258 of the *Municipal Government Act*, RSA 2000, c. M-26, where an increase to the original cost of the capital property exceeds 15 per cent then the borrowing bylaw must be advertised.

COMMUNITY INSIGHTS

Borrowing bylaws reflect a legislative requirement of the borrowing process. As a result, no community insight is undertaken with respect to the borrowing bylaw process. Where required by the *Municipal Government Act*, borrowing bylaws are advertised.

ATTACHMENTS

1. Bylaw 19948 - A Bylaw to amend Bylaw 18062, to authorize the City of Edmonton to undertake, construct and finance Coronation Community Recreation Centre
2. Bylaw 18062 Redline version
3. Capital Profile 15-21-5801

CITY OF EDMONTON

BYLAW 19948

A Bylaw to amend Bylaw 18062, to authorize the City of Edmonton to undertake, construct and finance Coronation Community Recreation Centre

WHEREAS:

- A. The Council of the City of Edmonton on January 22, 2019 duly passed Bylaw 18062, authorizing the City of Edmonton to undertake, construct and finance Coronation Community Recreation Centre (“Project”), and also authorizing the Mayor and Chief Administrative Officer to borrow the sum of \$107,260,000.00 for a period of twenty-five (25) years with the principal and interest to be repaid in semi-annual or annual instalments;
- B. It has now been determined that the total cost of the Project is \$153,410,000.00. The borrowing authority will therefore be increased by \$41,150,000.00 from \$107,260,000.00 to \$148,410,000.00;

THEREFORE, THE COUNCIL OF THE CITY OF EDMONTON DULY ASSEMBLED ENACTS AS FOLLOWS:

1. Bylaw 18062 is amended in the title and in the preamble, paragraph one, thereof by deleting the words “Coronation Community Recreation Centre” as it appears and by substituting the words “Integrated Infrastructure Services Project, Coronation Park Sports and Recreation Centre”.
2. The said Bylaw is further amended in the preamble, paragraph two, thereof by deleting the figure “\$112,260,000.00” as it appears and by substituting the figure “\$153,410,000.00”.
3. The said Bylaw is further amended in the preamble, paragraph three, thereof by deleting the words “Partner contributions in the amount of \$4,000,000.00 are expected to be received and applied to the said Project and \$1,000,000.00 of Pay-As-You-Go funding is to be applied to the said Project;” as it appears and by substituting the words “There are grants or contributions to be received or applied to the said Project as detailed in Schedule "A"; ”.
4. The said Bylaw is further amended in the preamble, paragraph four, and Sections (1) and (2), thereof by deleting the figure “\$107,260,000.00” as it appears and by substituting the figure “\$148,410,000.00”.
5. The said Bylaw is further amended in the preamble, paragraph seven, thereof by deleting the date “December 31, 2017” and the amount of “\$2,912,129,646.12” for the existing debt of the City of Edmonton as it appears and substituting the date “December 31, 2020” and the figure “\$3,407,145,492.13”.

6. The said Bylaw is further amended by replacing Schedule “A” with Schedule “A” as attached.
7. This Bylaw shall take effect on the day of the final passing thereof.

READ a first time this 24th day of January 2022;

READ a second time this day of 2022;

READ a third time this day of 2022;

SIGNED AND PASSED this day of 2022.

THE CITY OF EDMONTON

.....

MAYOR

.....

CITY CLERK

Schedule "A"

Integrated Infrastructure Services Project, Coronation Park Sports and Recreation Centre
25 Years
(in thousands of dollars)

Project Number	Project Name	Estimated Total Cost	Partnership Contributions	Pay-As- You-Go	Borrowing Request	2021 and Prior Years	2022	2023	2024	2025	2026
15-21-5801	Coronation Park Sports and Recreation Centre	\$ 153,410	\$ 4,000	\$ 1,000	\$ 148,410	\$ 4,921	\$ 17,089	\$ 35,600	\$ 36,100	\$ 44,700	\$ 10,000
		<u>\$ 153,410</u>	<u>\$ 4,000</u>	<u>\$ 1,000</u>	<u>\$ 148,410</u>	<u>\$ 4,921</u>	<u>\$ 17,089</u>	<u>\$ 35,600</u>	<u>\$ 36,100</u>	<u>\$ 44,700</u>	<u>\$ 10,000</u>

CITY OF EDMONTON

BYLAW 18062

A Bylaw to authorize the City of Edmonton
to undertake, construct and finance ~~Integrated Infrastructure Services~~
~~Project, Coronation Park Sports and Recreation Centre~~ ~~Coronation~~
~~Community Recreation Centre~~

WHEREAS:

The Council of the City of Edmonton has decided to issue a bylaw pursuant to Sections 251 and 258 of the *Municipal Government Act*, R.S.A. 2000, c. M-26 to authorize the City of Edmonton to undertake, construct and finance ~~Integrated Infrastructure Services Project,~~
~~Coronation Park Sports and Recreation Centre~~ ~~Coronation Community Recreation Centre~~
("Project");

The City of Edmonton has made plans, specifications and estimates for the said Project and confirms the total cost of the said Project is ~~\$153,410,000.00~~ ~~\$112,260,000.00~~;

~~There are grants or contributions to be received or applied to the said Project as detailed in~~
~~Schedule "A";~~ ~~Partner contributions in the amount of \$4,000,000.00 are expected to be received~~
~~and applied to the said Project and \$1,000,000.00 of Pay-As-You-Go funding is to be applied to~~
~~the said Project;~~

In order to construct and complete the said Project, it will be necessary for the City of Edmonton to borrow the sum of ~~\$148,410,000.00~~ ~~\$107,260,000.00~~ for the terms and conditions referred to in this bylaw and as detailed in Schedule “A”;

The above expenditure was approved by the City of Edmonton in its estimate of capital expenditures through the 2015-2018 and 2019-2022 Capital Budget;

The City of Edmonton will repay the indebtedness over a period of up to twenty-five (25) years in semi-annual or annual instalments, with interest not exceeding nine per cent (9%), per annum;

The amount of the existing debenture debt of the City of Edmonton at ~~December 31, 2017~~ ~~December 31, 2020~~ is ~~\$3,407,145,492.13~~ ~~\$2,912,129,646.12~~, as calculated in accordance with the *Debt Limit Regulation*, A.R. 255/2000, as amended, no part of which is in arrears;

The probable lifetime of the said Project is a minimum of twenty-five (25) years;

All required approvals for the said Project have been obtained and the Project is in compliance with all Acts and Regulations of the Province of Alberta;

THEREFORE, THE COUNCIL OF THE CITY OF EDMONTON DULY ASSEMBLED
ENACTS AS FOLLOWS:

1. That for the purpose of said Project, the sum of ~~\$148,410,000.00~~ ~~\$107,260,000.00~~ be borrowed by way of debenture on the credit and security of the City of Edmonton at large.
2. The debentures to be issued under this bylaw shall not exceed the sum of ~~\$148,410,000.00~~ ~~\$107,260,000.00~~, and may be in any denomination not exceeding the amount authorized by this bylaw and shall be dated having regard to the date of the borrowing.
3. The debentures shall bear interest during the currency of the debentures, at a rate not exceeding nine per cent (9%) per annum, payable semi-annually or annually.
4. The debentures shall be issued for a period of up to twenty-five (25) years and the City of Edmonton will repay the principal and the interest in semi-annual or annual instalments.
5. For the purpose of this bylaw, the Chief Elected Official (as defined by the *Municipal Government Act*) means the Mayor, and the Chief Administrative Officer (as defined by the *Municipal Government Act*) means the City Manager, of the City of Edmonton. The Mayor and the City Manager shall authorize such bank or financial institution to make payments to the holder of the debentures, on such date and in such amounts as specified in the repayment schedule forming part of each debenture.

6. The debentures shall be signed by the Mayor and the City Manager of the City of Edmonton and the City Manager shall affix thereto the corporate seal of the City of Edmonton to the debentures.

7. There shall be levied and raised in each year of the currency of the debentures a rate or rates, sufficient to pay the principal and interest falling due in such year on such debentures by a rate sufficient therefore on all the taxable property in the City and collectible at the same time and in the same manner as other rates.

8. The indebtedness is contracted on the credit and security of the City of Edmonton at large.

9. The net amount realized by the issue and sale of debentures authorized under this bylaw shall be applied only for the purposes for which the indebtedness was created.

10. This bylaw shall take effect on the day of the final passing thereof.

READ a first time this	14 th	day of	December	2018;
READ a second time this	22nd	day of	January	2019;
READ a third time this	22nd	day of	January	2019;
SIGNED AND PASSED this	22nd	day of	January	2019.

THE CITY OF EDMONTON

.....

MAYOR

.....

CITY CLERK

Schedule "A"

Coronation Community Recreation Centre 25 Years (in thousands of dollars)										
Project Number	Project Name	Estimated Total Cost	Partnership Contributions	Pay-As-You-Go	Borrowing Request	2018	2019	2020	2021	2022
15-21-5801	Coronation Community Recreation Centre	\$ 112,260	\$ 4,000	\$ 1,000	\$107,260	\$ 5,879	\$ 77,000	\$ 8,381	\$ 2,000	\$ 14,000
		<u>\$ 112,260</u>	<u>\$ 4,000</u>	<u>\$ 1,000</u>	<u>\$107,260</u>	<u>\$ 5,879</u>	<u>\$ 77,000</u>	<u>\$ 8,381</u>	<u>\$ 2,000</u>	<u>\$ 14,000</u>

Schedule "A"

Integrated Infrastructure Services Project, Coronation Park Sports and Recreation Centre
25 Years
(in thousands of dollars)

Project Number	Project Name	Estimated Total Cost	Partnership Contributions	Pay-As-You-Go	Borrowing Request	2021 and Prior Year	2022	2023	2024	2025	2026
15-21-5801	Coronation Park Sports and Recreation Centre	\$ 153,410	\$ 4,000	\$ 1,000	\$ 148,410	\$ 4,921	\$17,089	\$35,600	\$36,100	\$44,700	\$10,000
		<u>\$ 153,410</u>	<u>\$ 4,000</u>	<u>\$ 1,000</u>	<u>\$ 148,410</u>	<u>\$ 4,921</u>	<u>\$ 17,089</u>	<u>\$ 35,600</u>	<u>\$ 36,100</u>	<u>\$ 44,700</u>	<u>\$ 10,000</u>

CAPITAL PROFILE REPORT

PROFILE NAME:	CORONATION PARK SPORTS AND RECREATION CENTRE	FUNDED
PROFILE NUMBER:	15-21-5801	PROFILE STAGE: Approved
DEPARTMENT:	Integrated Infrastructure Services	PROFILE TYPE: Standalone
LEAD BRANCH:	Infrastructure Delivery	LEAD MANAGER: Jason Meliefste
PROGRAM NAME:		PARTNER MANAGER: Roger Jevne
PARTNER:	Community & Recreation Facilities	ESTIMATED START: December, 2021
BUDGET CYCLE:	2015-2018	ESTIMATED COMPLETION: June, 2026

Service Category:	Recreation & Culture	Major Initiative:	
GROWTH	RENEWAL	PREVIOUSLY APPROVED:	153,410
100		BUDGET REQUEST:	-
		TOTAL PROFILE BUDGET:	153,410

PROFILE DESCRIPTION

Design and construction of Coronation Park Sports and Recreation Centre will be completed in a phased approach. The facility will create a community hub with a connection to the Peter Hemingway Leisure Centre and includes a fitness centre, multi-purpose spaces, running/walking track, gymnasium and a 250m indoor cycling track.

PROFILE BACKGROUND

The Council approved Medium Term Recreation Facility and Sports Field Plan recommendations included expansion of Peter Hemingway into a community recreation facility. A feasibility study supported inclusion of a cycling track in partnership with the Argyll Velodrome Association and Edmonton Triathlon Academy.

PROFILE JUSTIFICATION

Supports the Way's plans, goals and outcomes; integrates the Recreation Facility Master Plan; aligns with Infrastructure Strategy; keeps mature neighbourhoods lively and vibrant; increased program opportunities including cycling and triathlon training and events.

STRATEGIC ALIGNMENT

The project supports corporate goals and outcomes including "Healthy City" by offering facilities and public spaces, to improve connectivity and vibrancy for all identities; "Urban Places" by providing access to holistic, integrated neighbourhood level amenities for all seasons and "Regional Prosperity" as The City of Edmonton has a resilient financial position providing public facilities.

ALTERNATIVES CONSIDERED

Alternatives were explored through the development of the Recreation Facility Master Plan, Medium Term Recreation Facility and Sports Field Plan and the 2011 Study to include a cycling track in partnership with Argyll Velodrome Association.

COST BENEFITS

Citizens will have access to and benefit from programs and services that provide enjoyment and personal health benefits. Attendance generated by the Centre will increase overall participation in recreation facilities. Edmonton's quality of life and livability benefits from physical, sport, leisure, cultural and recreation opportunities and activities for all ages and abilities.

KEY RISKS & MITIGATING STRATEGY

A preliminary risk analysis has been completed. The risk management framework will be applied to all aspects of the project and will continue to be develop and evolve as the project and partnerships are defined.

RESOURCES

The City of Edmonton seeks to purchase goods, services and construction fairly based on best value. Community and Recreation Facilities will follow Human Resource Management policies and procedures for engagement, training and retention of staff.

CONCLUSIONS AND RECOMMENDATIONS

Coronation Park Sports and Recreation Centre will meet the recreation, leisure and sport needs of the community and as a facility with a cycling track will enhance the sport development opportunities at all levels for cyclist and triathletes.

CHANGES TO APPROVED PROFILE

CAP#8: Council has approved that \$16 million of partnership funds be replaced with Tax Supported Debt. A report is expected at checkpoint 4 to verify scope and operations.

2021 Fall SCBA (#21-30A, Amendment CP-4): That capital profile "15-21-5801 - Coronation Park Sports and Recreation Center", be increased by \$41,150,000 and recashflowed to reflect scenario 2 - Build to Program, as outlined "Option 1 - Fund and Proceed to Delivery" as per Attachment 6 of the November 22, 2021, Financial and Corporate Services report FCS00818.

CAPITAL PROFILE REPORT

Profile Page 2

PROFILE NAME: **Coronation Park Sports and Recreation Centre**

PROFILE NUMBER: **15-21-5801**

BRANCH: **Infrastructure Delivery**

FUNDED

PROFILE TYPE: **Standalone**

CAPITAL BUDGET AND FUNDING SOURCES (000's)

	Prior Years	2021	2022	2023	2024	2025	2026	2027	2028	2029	Beyond 2029	Total
APPROVED BUDGET	Approved Budget											
	Original Budget Approved	112,260	-	-	-	-	-	-	-	-	-	112,260
	2017 Cap Carry Forward	-	-	-	-	-	-	-	-	-	-	-
	2018 Cap Budget Request for Next Cycle	-16,000	7,000	9,000	-	-	-	-	-	-	-	-
	2018 Cap Carry Forward	-	-	-	-	-	-	-	-	-	-	-
	2019 Cap Carry Forward	-	-	-	-	-	-	-	-	-	-	-
	2020 Cap Carry Forward	-92,567	92,567	-	-	-	-	-	-	-	-	-
	2021 Cap Council	-	-97,339	8,089	35,600	36,100	44,700	14,000	-	-	-	41,150
	Current Approved Budget	3,693	2,228	17,089	35,600	36,100	44,700	14,000	-	-	-	153,410
	Approved Funding Sources											
	Partnership Funding	-	-	-	-	-	4,000	-	-	-	-	4,000
	Pay-As-You-Go	223	777	-	-	-	-	-	-	-	-	1,000
	Tax-Supported Debt	3,469	1,451	17,089	35,600	36,100	44,700	10,000	-	-	-	148,410
	Current Approved Funding Sources	3,693	2,228	17,089	35,600	36,100	44,700	14,000	-	-	-	153,410

BUDGET REQUEST	Budget Request	-	-	-	-	-	-	-	-	-	-	-
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REVISED BUDGET (IF APPROVED)	Revised Budget (if Approved)	3,693	2,228	17,089	35,600	36,100	44,700	14,000	-	-	-	153,410
	Requested Funding Source											
	Partnership Funding	-	-	-	-	-	4,000	-	-	-	-	4,000
	Pay-As-You-Go	223	777	-	-	-	-	-	-	-	-	1,000
	Tax-Supported Debt	3,469	1,451	17,089	35,600	36,100	44,700	10,000	-	-	-	148,410
	Requested Funding Source	3,693	2,228	17,089	35,600	36,100	44,700	14,000	-	-	-	153,410

CAPITAL BUDGET BY ACTIVITY TYPE (000's)

	Activity Type	Prior Years	2021	2022	2023	2024	2025	2026	2027	2028	2029	Beyond 2029	Total
REVISED BUDGET (IF APPROVED)	Construction	-9,584	2,228	17,089	35,600	36,100	44,700	14,000	-	-	-	-	140,133
	Design	10,301	-	-	-	-	-	-	-	-	-	-	10,301
	Equip FurnFixt	2,251	-	-	-	-	-	-	-	-	-	-	2,251
	Percent for Art	724	-	-	-	-	-	-	-	-	-	-	724
	Total	3,693	2,228	17,089	35,600	36,100	44,700	14,000	-	-	-	-	153,410

OPERATING IMPACT OF CAPITAL

Type of Impact:

Branch:																
	Rev	Exp	Net	FTE	Rev	Exp	Net	FTE	Rev	Exp	Net	FTE	Rev	Exp	Net	FTE
Total Operating Impact	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-



MOTIONS PENDING REPORT

8.1 Kingsway Legion Outstanding Tax Balance Options (A. Paquette)

Councillor A. Paquette stated that at the next regular meeting of City Council, he would move the following:

That Administration return to Executive Committee with a report outlining the options available to Council for supporting the Kingsway Legion (account 10189875) with their current outstanding tax balance.

- Notice of Motion Given: February 15, 2022, Urban Planning Committee

8.2 Social Development Community Services Budget (A. Stevenson)

Councillor A. Stevenson stated that at the next regular meeting of City Council, she would move the following:

That the 2022 expenditure budget for Social Development, Community Services, be increased by \$4.8 million on a one-time basis with funding from the Financial Stabilization Reserve to fund a bridge housing transition plan.

- Notice of Motion Given: February 16, 2022, Executive Committee