



REVISED AGENDA

GREEN LINE BOARD

June 18, 2021, 1:00 PM
IN THE VIRNETTA ANDERSON HALL

Members

Board Member D. Fairbairn, Chair
Board Member I. Bourne, Vice-Chair
Board Member J. Annesley
Board Member L. Beasley
Board Member F. Cummings
Board Member B. Mahajan
Board Member P. McLeod
Board Member M. Nelson
City Manager D. Duckworth

SPECIAL NOTES:

Public are encouraged to follow Green Line Board meetings using the [live stream](#)

Board Members will be participating remotely.

1. CALL TO ORDER
2. OPENING REMARKS AND LAND ACKNOWLEDGEMENT
3. CONFIRMATION OF AGENDA
 - 3.1. DECLARATIONS - CONFLICTS OF INTEREST
4. CONFIRMATION OF MINUTES
 - 4.1. Minutes of the Regular Meeting of the Green Line Board, 2021 May 28
5. SAFETY MINUTE
6. CORRESPONDENCE
7. CONSENT AGENDA

7.1. DEFERRALS AND PROCEDURAL REQUESTS

None

7.2. BRIEFINGS

None

8. ITEMS FROM GREEN LINE PROGRAM TEAM AND COMMITTEES

NEW MATERIAL

8.1. *Green Line Program April 2021 Progress Report, GLB2021-0973*

NEW MATERIAL

8.2. *Taking Care of Business Update, GLB2021-0975*

8.3. COMMITTEE REPORTS

8.3.1. Planning Committee Report (Verbal), GLB2021-0970

8.3.2. Budget and Risk Committee Report (Verbal), GLB2021-0971

8.3.3. Governance and HR Committee Report (Verbal), GLB2021-0972

8.3.4. Recruitment Committee Report (Verbal), GLB2021-0974

9. URGENT BUSINESS

10. CONFIDENTIAL ITEMS

10.1. ITEMS FROM GREEN LINE PROGRAM TEAM AND COMMITTEES

10.1.1. Green Line Board Program April 2021 Progress Report, GLB2021-0973
Held confidential 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*.

10.1.2. Governance Audit Report, GLB2021-0977
Held confidential pursuant to Section 24 (Advice from officials) of the *Freedom of Information and Protection of Privacy Act*.

10.1.3. Procurement Update, GLB2021-0978
Held confidential 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*.

10.1.4. Committee Reports (Verbal), GLB2021-0979
Held confidential pursuant to Section 24 (Advice from officials) of the *Freedom of Information and Protection of Privacy Act*.

10.1.5. CEO Position (Verbal), GLB2021-0980
Held confidential pursuant to Section 17 (Personal information) of the *Freedom of Information and Protection of Privacy Act*.

10.2. URGENT BUSINESS

11. ADJOURNMENT



**MINUTES
GREEN LINE BOARD**

**May 28, 2021, 1:00 PM
IN THE VIRNETTA ANDERSON HALL**

PRESENT: Board Member D. Fairbairn, Chair (Remote Participation)
Board Member I. Bourne, Vice-Chair (Remote Participation)
Board Member J. Annesley (Remote Participation)
Board Member L. Beasley (Remote Participation)
Board Member F. Cummings (Remote Participation)
Board Member B. Mahajan (Remote Participation)
Board Member P. McLeod (Remote Participation)
Board Member M. Nelson (Remote Participation)
City Manager D. Duckworth (Remote Participation)

ALSO PRESENT: General Manager M. Thompson (Remote Participation)
Legislative Coordinator M. A. Cario
Legislative Advisor L. Kearnes

1. CALL TO ORDER

Chair Fairbairn called the Meeting to order at 1:01 p.m.

ROLL CALL

Board Member Beasley, Board Member Bourne, Board Member Annesley, Board Member Cummings, Board Member Mahajan, Board Member Nelson, Chair Fairbairn, and City Manager Duckworth.

Absent for Roll Call: Board Member McLeod (joined the Remote Meeting at 1:02 p.m.)

2. OPENING REMARKS AND LAND ACKNOWLEDGEMENT

Chair Fairbairn provided opening remarks and a traditional land acknowledgement.

3. CONFIRMATION OF AGENDA

Moved by Board Member Beasley

That the Agenda for the 2021 May 28 Regular Meeting of the Green Line Board be confirmed.

MOTION CARRIED

3.1 DECLARATIONS - CONFLICTS OF INTEREST

No conflicts of interest were declared.

4. CONFIRMATION OF MINUTES

Moved by Board Member Mahajan

That the following sets of Minutes be confirmed in an omnibus motion:

4.1 Minutes of the Regular Meeting of the Green Line Board, 2021 May 05

4.2 Minutes of the Special Meeting of the Green Line Board 2021 May 10

MOTION CARRIED

5. SAFETY MINUTE

5.1 Safety Minute Presentation

A presentation was distributed with respect to the Safety Minute Presentation. General Manager Thompson provided a verbal update and was thanked by the Board.

6. CORRESPONDENCE

None

7. CONSENT AGENDA

7.1 DEFERRALS AND PROCEDURAL REQUESTS

None

7.2 BRIEFINGS

None

8. ITEMS FROM GREEN LINE PROGRAM TEAM AND COMMITTEES

8.1 Board Governance Manual, GLB2021-0846

Moved by Board Member Nelson

That with respect to Report GLB2021-0846, the following be approved:

That the Green Line Board adopt the Green Line Board Governance Manual effective 2021 May 28 to guide the Green Line Board in its governance role pursuant to Green Line Board Bylaw 21M2020.

MOTION CARRIED

8.2 COMMITTEE REPORTS

8.2.1 Planning Committee Report (Verbal), GLB2021-0847

Board Member Beasley provided a verbal update and was thanked by the Board.

8.2.2 Budget and Risk Committee Report (Verbal), GLB2021-0848

Board Member Bourne provided a verbal update and was thanked by the Board.

8.2.3 Governance and HR Committee Report (Verbal), GLB2021-0849

Board Member Nelson provided a verbal update and was thanked by the Board.

8.2.4 Recruitment Committee Report (Verbal), GLB2021-0850

Board Member Nelson provided a verbal update and was thanked by the Board.

9. URGENT BUSINESS

None

10. CONFIDENTIAL ITEMS

Moved by Board Member Annesley

That pursuant to Sections 17 (Disclosure harmful to personal privacy), 23 (Local public body confidences), 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*, Committee now move into Closed Meeting at 1:47 p.m., in Virnetta Anderson Hall, to discuss confidential matters with respect to the following Items:

- 10.1.1. Payment for Assignment of Executive Responsibilities, GLB2021-0851
- 10.1.2. Provincial Review and Procurement Update (Verbal), GLB2021-0852
- 10.1.3. Committee Reports (Verbal), GLB2021-0853

MOTION CARRIED

Committee reconvened in public meeting at 3:08 p.m. with Chair Fairbairn in the Chair.

Moved by Board Member Beasley

That the Green Line Board rise and report.

MOTION CARRIED

ROLL CALL

Board Member Annesley, Board Member Beasley, Board Member Bourne, Board Member Cummings, Board Member Mahajan, Board Member McLeod, Board Member Nelson, Chair Fairbairn, and City Manager Duckworth.

10.1 ITEMS FROM GREEN LINE PROGRAM TEAM AND COMMITTEES

10.1.1 Payment for Assignment of Executive Responsibilities, GLB2021-0851

Chair Fairbairn declared a Pecuniary Interest due to potential financial implications and abstained from discussion and voting with respect to Report GLB2021-0851.

Chair Fairbairn left the Closed Meeting at 1:50 p.m. and Vice-Chair Bourne assumed the Chair Remotely.

Chair Fairbairn resumed the Chair at 2:03 p.m. after the discussion was completed and Board Member Bourne returned to his regular seat in the Board.

Administration in attendance with respect to Report GLB2021-0851:

Clerks: M. A. Cario and L. Kearnes. Law: M. A. Bendfeld. Advice: M. Thompson, D. Ewing, K. Mahmud, W. Tynan, and L. Adamo, S. Quayle.

Chair Fairbairn left the Remote Meeting at 3:09 p.m. and Vice-Chair Bourne assumed the Chair Remotely.

Moved by Board Member Nelson

That with respect to Report GLB2021-0851, the following be approved:

That the Green Line Board:

1. Direct payments of \$10,000.00 per month be made on a temporary basis to the Chair of the Green Line Board for the performance of executive responsibilities assigned to the Chair by the Green Line Board on February 18, 2021 in Report GLB2021-0283, such payments to begin at the date the executive responsibilities were assigned and continue until the Board is satisfied that the transition plan for the new Chief Executive Officer has been fully executed.
2. Direct that Report and attachments be received for the corporate record and be made public.
3. Direct that the Closed Meeting discussion be held confidential pursuant to Section 17 (Personal privacy) of the *Freedom of Information and Protection of Privacy Act*.

MOTION CARRIED

Chair Fairbairn resumed the Chair at 3:10 p.m. after the vote was declared and Board Member Bourne returned to his regular seat in the Board.

10.1.2 Provincial Review and Procurement Update (Verbal), GLB2021-0852

Administration in attendance with respect to Report GLB2021-0852:

Clerks: M. A. Cario and L. Kearnes. Law: M. A. Bendfeld. Advice: M. Thompson, D. Ewing, A. Kurji, K. Mahmud, T. Rathie, W. Tynan, and L. Adamo, S. Quayle.

A confidential presentation was distributed with respect to Report GLB2021-0852.

Moved by Board Member McLeod

That with respect to Report GLB2021-0852, the following be approved:

That the Green Line Board:

1. Approve Closed Meeting Recommendations 1 and 2;
2. Direct that Closed Meeting Recommendations 1 and 2 remain confidential pursuant to Sections 24 (Advice from officials), 25 (Harmful to economic interests), and 27 (Privileged information) of the *Freedom of Information and Protection of Privacy Act* to be reviewed by 2036 May 28 or such earlier date as determined by the Chair of the Green Line Board;
3. Approve the federal funding business case for the Green Line project in its current or substantially similar form and direct the Green Line Program Team to finalize and submit the federal funding business case for the Green Line project to the Government of Alberta and the Government of Canada, subject to the approval by the Chair of the Green Line Board of any subsequent immaterial or minor changes to the federal funding business case;
4. Direct that the federal funding business case and attachments remain confidential pursuant to Sections 23 (Local public body confidences), 24 (Advice from officials), and 25 (Harmful to economic interests) of the *Freedom of Information and Protection of Privacy Act* to be reviewed by 2036 May 28 or such earlier date as determined by the Chair of the Green Line Board;
5. Direct that the Closed Meeting presentations and discussions be held confidential 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* to be reviewed by 2036 May 28

MOTION CARRIED

10.1.3 Committee Reports (Verbal), GLB2021-0853

Administration in attendance with respect to Report GLB2021-0853:

Clerks: M. A. Cario and L. Kearnes. Law: M. A. Bendfeld. Advice: M. Thompson, D. Ewing, K. Mahmud, W. Tynan, and L. Adamo, S. Quayle.

Moved by Board Member Beasley

That with respect to Verbal Report GLB2021-0853, the following be approved:

That the Green Line Board direct that the Closed Meeting discussion be held confidential pursuant to Section 24 (Advice from officials) of the *Freedom of Information and Protection of Privacy Act*.

MOTION CARRIED

10.2 URGENT BUSINESS

None

11. ADJOURNMENT

By General Consent, Green Line Board adjourned this meeting at 3:14 p.m.

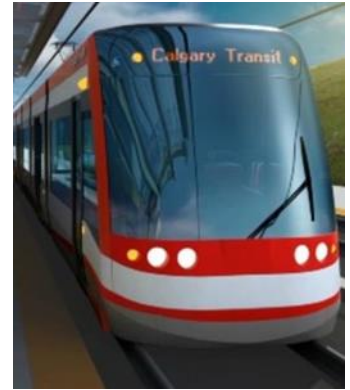
The next Regular Meeting of the Green Line Board is scheduled to be held on 2021 June 18 at 1:00 p.m.

CONFIRMED BY COMMITTEE ON

CHAIR

ACTING CITY CLERK

UNCONFIRMED

































Green Line LRT

Green Line Board April 2021 Progress Report





1 Executive Summary

1.1 Project Status Dashboard

	Overall Program	Enabling Works	LRVs	Segment 1	Segment 2	Owner Activities	Comments
Health & Safety			N/A	N/A	N/A		Green Line safety continues to be well managed through COVID pandemic with associated safety incidents.
Environmental			N/A				Baseline environmental data collection for contaminated sites, biophysical, fisheries, trees, and noise is progressing well.
Stakeholder Relations			N/A				Overall red due to uncertainty of provincial review impacting how stakeholders view the project.
Schedule							Program is delayed pending the completion of the provincial review. Schedule performance in Enabling Works continues to be low. However, this is not impacting critical path.
Cost							Current estimate under review due to increased pressures around escalation cost factor, functional design development and schedule delays.
Quality					N/A		Program quality management plan in

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							development with expected issue in May 2021.
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LEGEND*:	On Plan		At Risk		Off Plan		Not Started		Not Applicable	N/A
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*Definition of legend for the dashboard in Appendix 1

Overall – Work with the province to address the recommendations brought forward through their project review continues to progress well. Procurement strategy and cost and risk estimates remained the focus of provincial discussion. Additional questions on design and geotechnical risk in the downtown were raised and reviewed.

Contract discussions with proponent for the downtown utility relocation Construction Manager procurement concluded.

LRV procurement is underway and the segment 1 LRT RFP remains paused.

Segment 2 Functional Plan design, planning and engagement concluded in April for the Beltline, Downtown/Eau Claire, Bow River Bridge and Centre Street. The functional plan will be brought to Green Line Committee in May 2021.

Health & Safety – The Project is on plan with safety management system compliance. There is a lag in mandatory training for safety excellence certification due to in-person training risks (pandemic precautions) for first aid and leadership. Review of contractor site specific safety plans prior to commencement of field work and maintaining monthly safety inspections and Green Line Joint OH&S inspection and meetings are all on track. Continue auditing City, Consultant and Contractor compliance to respective Safety Management Systems and performance.

Environmental - The overall Environmental Management program for Green Line segment 1 and segment 2 remains on plan this month with the main focus on segment 2 activities. segment 2 activities include specific baseline environmental discipline work for: contaminated sites, biophysical and fisheries assessments, tree surveys, noise assessments, Green House Gases/Climate Lens and Resilience, the Envision Sustainability program and other Permits, Licenses and Approvals support work. Discussions regarding contaminated sites Phase 2 assessments and clean up/ remediation work for segment 1 in advance of construction continue. Final discussions with Alberta Environment regarding Green Line Soil Management Guidelines are underway.

Stakeholder Relations – The uncertainty of the provincial review outcome and corresponding lack of clarity in timelines and schedules for the project continues to impact all project stakeholders. Feedback through segment 2 Functional Plan provided significant ongoing project support. The goal remains to provide an update to Calgarians by the end of May 2021.

Schedule - Procurement strategy and contracting is a key driver for the schedule and remains an outstanding item with the province. The team continues to work with the province through their review.

segment 1 Enabling Works is nearing completion. The ongoing Enabling Works program continues to be delayed in some areas and does not affect the overall program schedule.

Cost – Current estimate under review due to increased pressures around escalation cost factor, functional design development and schedule delays.

Quality - Quality Management of the Enabling Works continues with closeout of contracts. Completion of the Green Line Program Quality Management Plan and procedures continued with issue for review anticipated in May. A Green Line Project Quality Plan is under development for segment 2 Utilities Relocation project.

1.2 Financial Summary for April 2021

Category	Total Committed Costs	Expenditures Project to Date	Expenditures Project to Date Previous Month	Expenditures for 2021 to Date
Owner's Costs	\$ 56,812,537	\$ 56,658,490	\$ 55,340,778	\$ 4,950,957
Land	\$ 219,228,391	\$ 219,178,031	\$ 219,094,196	\$ 1,333,736
Design & Engineering	\$ 276,400,474	\$ 217,757,563	\$ 214,834,864	\$ 11,457,189
Construction	\$ 167,723,060	\$ 144,054,046	\$ 142,534,360	\$ 2,395,121
TOTAL	\$ 720,164,462	\$ 637,648,130	\$ 631,804,198	\$ 20,137,003

Owner's Costs: Include City of Calgary Staff Time, Communications, Software, and General Corporate Overheads and Inter- Business Unit costs.

Design & Engineering: Includes all Owner's Engineer costs as well as general Project Consultants.

Construction: Includes Enabling Works and Quick Win build costs

Committed Costs present issued PO values only for design & engineering/construction. Land and Owner's costs are incurred to date only.

2021 Green Line Forecast is in progress.

1.3 Milestone Schedule

Milestone schedule to be included after completion of provincial review.

1.4 Risk Management

Project currently has a high amount of risk and uncertainty. Below are some of the primary risk items for the program right now.

- Finalization of the provincial review, including approval of the business case, which will confirm the funding, updates to the funding agreement and the path forward.
- Vacancies within the leadership team and recruitment is underway to fill these positions.
- Competitive pressure in the marketplace in Canada creates limited available capacity for the proponent expertise required. Procurement strategies are under development to address this risk.
- Time delays and anticipated cost escalation result in increased budget pressure. Further refinement of cost estimates and risk understanding is underway to address these risks.
- Continued delays in moving the program forward has eroded stakeholder and market confidence. Green Line is in regular communication with stakeholders and the market to provide updated information as it becomes available.

There is a detailed risk register and risk management strategies that are regularly reviewed and updated by the team. In addition to internal risk work, a preliminary independent due diligence review of the Risk Management process was conducted this period.




1.5 Project Highlights

Project	Summary of Status this Month	Next Month
Overall Program	Work with the province to address the recommendations brought forward through their project review continues to progress well. Review of cost estimates due to COVID related escalation underway.	Work with the province to resolve outstanding items raised during their review and prepare business case submission.
Enabling Works	Four projects within the segment 1 area are on track for completion by July 2021 with project closeout underway where applicable. Identified opportunities for some additional early works that can be completed to de-risk main contract.	Confirm additional Enabling Work Contracts in segment 1 area. Public announcement of CM contract. Onboarding CM with kickoff meetings




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	Contract negotiations with Construction Management (CM) for Utilities Relocation Beltline/Downtown concluded.	and review of 30% Design Report.
LRV	The LRV procurement is proceeding as scheduled, with award of a contract planned in the fall of 2021.	Proceed per schedule.
Segment 1	Segment 1 is currently paused to allow The City to work collaboratively with the province to address concerns raised for the overall procurement and contracting strategy.	Work to complete provincial review including agreement on procurement and contracting strategy.
Segment 2	The segment 2 functional plan and associated reports were completed and presented to the planning sub-committee. Segment 2 public engagement related to the functional plan was concluded.	Segment 2 functional plan and associated reports will be presented to the Green Line Board and Green Line Committee.
Owners Activities	Work is underway to recruit for key positions including Chief Executive Officer (CEO), Chief Operating Officer (COO) with Delivery Director and Director of Business Services recruitment being staggered to support selection of CEO/COO. Board set-up activities continue in support of all Committees and the Board itself.	Recruitment to continue for key positions.

2 Health and Safety

	Overall Program	Enabling Works	LRVs	Segment 1	Segment 2	Owner Activities	Comments
Current Period			N/A	N/A	N/A		Green Line safety continues to be well managed through COVID pandemic with associated safety incidents.

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Last Period			N/A	N/A	N/A		Green Line safety continues to be well managed through COVID pandemic with associated safety incidents.
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LEGEND*:	On Plan		At Risk		Off Plan		Not Started		Not Applicable	N/A
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*Definition of legend for the dashboard in Appendix 1

2.1 Overall Program

Near-term Risks and Issues

No.	Detail	Action / Mitigation
1	In-person training unsafe and deferred due to COVID risks.	Resume first aid and leadership for safety excellence training once COVID risks have been overcome.

Milestones

Milestone	Plan	Forecast	Actual	Comment
	YYYY/MM/DD	YYYY/MM/DD	YYYY/MM/DD	

Key accomplishments/status

Continued auditing City, Consultant and Contractor compliance to respective Safety Management Systems and performance.

Safety Culture: The Green Line's strong safety culture is reflected in the passion and quality of safety presentations by delivered by Green Line personnel each week which is illustrated in the overall safety KPI metrics below. No Enabling Works were stopped due to suspected or actual positive COVID cases. Protocols for self-health checks prior to going to the office or out to construction sites combined with temperature checks upon arrival at site have worked well with additional on site and in-office protocols to keep COVID out of Green Line work areas.

The April Safety Focus was on reporting concerns and incidents and included a "Tip Sheet" as a guide to help properly report an incident. Reporting concerns and doing acts of safety are preventative approaches to eliminate hazardous conditions or actions before a potential injury is realized. Reporting incidents correctly allows for more effective mitigative measures as well as sharing of lessons learned.

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In addition, the Alberta OH&S April eNewsletter was forwarded and discussed with all Green Line personnel which provided links to comment on proposed Alberta OH&S Code changes, proactive inspections and April 28 National Day of Mourning to recognize those workers who have been injured or died at their workplace.

Enabling Works: Ensuring Green Line, Owner's Engineer, Consultant and Contractor personnel are executing work in accordance with their safety management systems and Alberta OH&S regulations on CN Track 'n Tunnel project.

Coordinating with Stakeholder Relations and Calgary Police Service (CPS) on securing and protecting abandoned houses along Ogden Street and Centre Street north while waiting for demolition contracts to be awarded.

Continued review of Site-Specific Safety Plan (SSSP) for South Hill paving work adjacent to Chemtron property. Reviewed CM contractor SSSP and contractor compliance to City safety requirements.

Upcoming deliverables/activities and Major Milestones

Enabling Works: Continued safety oversight of CN Track 'n Tunnel construction and hydrovac work along segment 2 in downtown area. Final review of SSSP for South Hill paving work adjacent to Chemtron property. Provide safety support for CM contract in preparation for spring work start.

Overall Program Metrics

The following chart contains the recorded incidents for the 12-month rolling average.

Note that no Lost Time Incidents (LTI) nor Medical Aid Incidents (MA) have occurred in the past 12 months which is why the TRIFR and LTIFR numbers at the bottom of this section are all zeros.

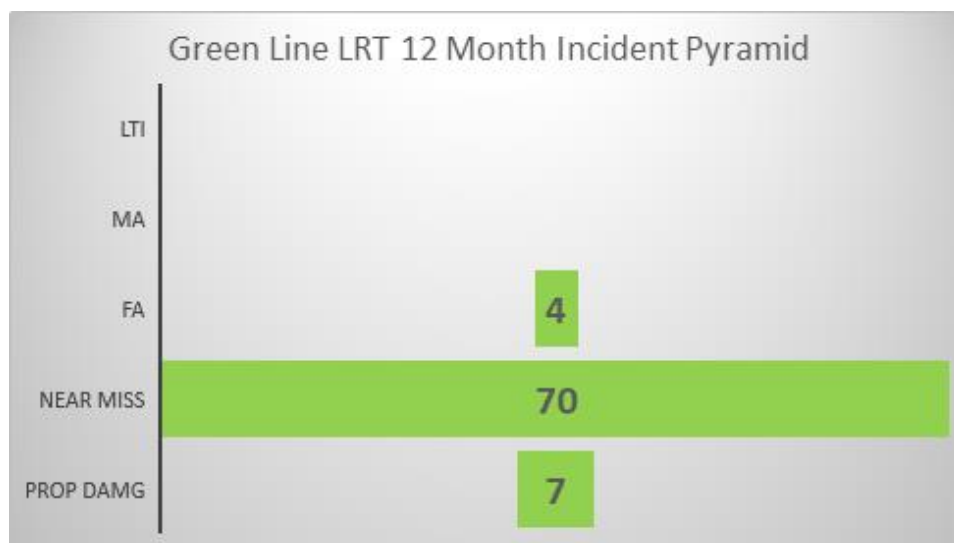


Table 1: Overview of Safety Metrics for the Program

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Metric	Current Month	YTD Incidents	Days since Last incident
Lost Time Incident	0	0	726
Medical Aids	0	0	399
First Aids	0	0	189
Property Damage/ Theft Incidents	2	3	23
Near Misses	5	21	10

The two property damages included a broken old sanitary pipe from Hood Industries when contacted by the earthworks excavator on April 1 and the second occurred on April 7 when vandals stole copper cables from site equipment.

Table 2: Lost Time Incidents for Reporting Month Details





Date of Injury	Site/Employer	Lost Time Days	Area of Injury	Incident Description
YYYY/MM/DD	N/A			

There have been no lost time incidents nor medical aids year to date on the Green Line program.

Table 3: Green Line Safety Statistics

Performance Indicator		GL City Staff	Contractors	GL City Staff & Contractors
TRIFR: Total Recordable Injury Frequency Rate (MA + LTI)	per 200,000 hrs			
	per 1,000,000 hrs			
LTIFR: Lost Time Injury Frequency Rate	per 200,000 hrs			
	per 1,000,000 hrs			

*** Statistics are based on 12 month rolling period April 30, 2020 to April 30, 2021**

LEGEND*:	On Plan		At Risk		Off Plan		Not Started		Not Applicable	N/A
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*Definition of legend for the dashboard in Appendix 1

2.2 Enabling Works

Safety oversight and rail safety support on CN Track 'n Tunnel project with the CN Track and Tunnel construction winding down. Emphasizing keeping mind on task until all work is completed. No Enabling Works were stopped due to suspected or actual positive COVID cases.

Near-term Risks and Issues

No.	Detail	Action / Mitigation
1	Rising lumber prices shifting on site theft from copper cables to lumber.	Clean up and demobilization of lumber not in use or anticipated to be needed.

2.3 LRVs

2.4 Segment 1

Near-term Risks and Issues

No.	Detail	Action / Mitigation
1		

2.5 Segment 2

Near-term Risks and Issues

No.	Detail	Action / Mitigation
1		

2.6 Owner Activities

Risks to in-person first aid and Leadership for Safety Excellence training remain due to COVID pandemic. Virtual orientation and safety training ongoing.

Near-term Risks and Issues

No.	Detail	Action / Mitigation
1	Expired FA certification for supervisors.	No/limited in office supervision at this time dues to COVID protocols; therefore, risk is low and mitigative plan is at the ready once COVID restrictions are lifted.

Appendix 1 –Dashboards Legends

	On Plan	At Risk	Off Plan
Health and Safety	Zero LTIs or Scheduled monthly site inspections completed with < 2 missed or Joint OH&S committee meetings and inspections on track or GL COR Internal Maintenance Audit completed with minor findings or all mandatory training complete	One LTI or ≤5 scheduled site inspection not completed or missed a Joint OH&S committee meeting or inspection or GL COR Internal Maintenance Audit completed with major findings or <90% mandatory training not completed	More than one LTI or >5 scheduled site inspections not completed or multiple Joint OH&S committee meetings or inspection not completed or GL COR Internal Maintenance Audit failed or less than 75% mandatory training complete
TRIFR: Total Recordable Injury Frequency Rate (MA +LTI)	Per 200,000 hrs <0.12 Per 1,000,000 hrs <0.60	Per 200,000 hrs ≥0.12 Per 1,000,000 hrs ≥0.60	Per 200,000 hrs >0.30 Per 1,000,000 hrs <1.50
LTIFR: Lost Time Injury Frequency Rate	Per 200,000 hrs <0.00 Per 1,000,000 hrs <0.00	Per 200,000 hrs ≥0.00 Per 1,000,000 hrs ≥0.00	Per 200,000 hrs >0.13 Per 1,000,000 hrs <0.65
Environmental	Overall environmental requirements are progressing as defined and work plans and budgets are being accurately managed	Specific environmental management subjects are being addressed and progressing; reliance on other project disciplines, information and inputs to complete the work may cause temporary delays	Failing to meet contractually required environmental obligations causing delays and complications for the Contractor and/or Owner

Stakeholder Relations	Minimal risk of reputational damage or Localized stakeholder issues	Moderate risk of reputational damage or Multiple stakeholder issues that require urgent action	Severe risk of reputational damage or Major risk with funding partners
Schedule	SPI ≥ 1.0 or No change to critical activities/milestones	SPI 0.9-0.99 or Delay of critical milestones by less than 4 weeks	SPI < 0.9 or Critical activities delayed by more than 4 weeks
Cost	CPI ≥ 1.0 or Costs forecast within the budget excluding retained contingency	CPI 0.95-0.99 or Costs forecast to be over budget and $< 30\%$ retained contingency	CPI < 0.95 or Cost forecast to be $>$ budget + 30 % retained contingency
Quality	Quality requirements adequate/defined or in progress or Audits performed per plan with no/minor findings or NCR identification and resolution are with expectations	Quality requirements not adequate/defined in at least one area or Audits performed per plan with one or more major findings or NCR identification and resolution are not trending downward	Quality requirements not adequate/defined in multiple areas or Audits not performed or performed with many major findings or Significant non-conformance with contract terms

Appendix 2 –Stakeholder Engagement Activities

Summary

During the month of April stakeholder outreach and engagement occurred through general communications, enquiry responses and through a series of virtual information sessions open to the public.

Meetings were held with Community Associations and BIAs, as well as the Bow River Bridge Stakeholder Advisory Group and key project stakeholders. In large part, the focus of engagement activities for the month of April was on the Final Inform Phase of the public engagement and included multiple virtual public information sessions to share progress and recommendations associated with the various project focus areas. Stakeholder sentiment varies with both positive and negative sentiment expressed during the public sessions and there is a desire for more detailed information about impacts and changes anticipated. More opportunities for engagement and ongoing conversations have been offered.

Ongoing stakeholder communications continues with businesses currently operating in proximity to Green Line Enabling Works construction in the communities of Ramsay, Highfield, Ogden and South Hill.

All 311 service requests have been addressed and closed.

Stakeholder Events / Outreach

Event	Purpose	Date/Time	Method	Attendance
Community Association Meeting (Crescent Heights)	To share progress update on Crescent Heights Planning	2021/04/07	Virtual meeting	Community Association board
Direct stakeholder outreach	Provide project update	2021/04/09	Virtual meeting	Beltline Neighbourhood Association
Direct stakeholder outreach	To share update and contact information with potentially impacted stakeholders	2021/04/11 to 2021/04/13	Letter/ email	Multiple stakeholders
Bow River LRT bridge Stakeholder Working Group (SWG)	To provide project updates including bridge forms being carried forward, and first showing of the Eau Claire/Promenade interface renderings	2021/04/14 11am-1pm	Virtual meeting	SWG members

Green Line Board April 2021 Progress Report

Event	Purpose	Date/Time	Method	Attendance
Final Inform Session	To share overview of Final Inform phase	2021/04/14	Virtual Meeting	CA/BIA
Direct stakeholder outreach	Advise key stakeholders in Inglewood and Ramsay of Elbow River crossing inclusion in upcoming engagement	2021/04/14	Email	Inglewood/ Ramsay Standing Stakeholder Committee
Direct stakeholder outreach	To discuss potential GL impacts	2021/04/15	Virtual Meeting	Business owner
Final Inform Session	To share overview of Final Inform phase	2021/04/15	Virtual Meeting	CA/BIA
Downtown/Beltline (segment 2A) virtual presentation	To share Green Line LRT segment 2A, including tunnel alignment	2021/04/15	Virtual Info session	143 registered / 71 at peak attendance
Virtual information session (Drop In)	Self-guided session and public Q & A	2021/04/19	Virtual Info session	8 in attendance
Planning in Crescent Heights virtual presentation	To share updated streetscape and Crescent Heights mobility study	2021/04/19	Virtual Info session	145 registered / 71 at peak attendance
Bow River LRT bridge virtual presentation	To learn about progress on bridge and pathways	2021/04/20	Virtual Info session	146 registered / 70 at peak attendance
Direct stakeholder outreach	Advise key stakeholders in Inglewood and Ramsay that live presentation is posted on web. Show commitment to open communications.	2021/04/20	Email	Inglewood/ Ramsay Standing Stakeholder Committee
North Central Mobility & Bus Rapid Transit (BRT) Studies virtual presentation	To share final recommendations	2021/04/21	Virtual Info session	55~ registered / 14 at peak attendance

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Event	Purpose	Date/Time	Method	Attendance
Virtual information session (Drop In)	Self-guided session and public Q & A	2021/04/22		19 in attendance

Stakeholder Enquiries / 311 Service Requests

Type	Themes	Quantity
311 Service Requests	<ul style="list-style-type: none"> – Property impact enquiry – Planning feedback/enquiry – Construction Impact (street cleaning) – Property maintenance – Other 	7 service requests
GL Enquiries/ Comments	<ul style="list-style-type: none"> – Questioning segment 1 alignment in Ogden – Opposition to bridge – CH design suggestions – Bridge design suggestions 	4 emails

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Green Line Board
2021 June 18

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Green Line Taking Care of Business Q2 2021 Update

RECOMMENDATION(S):

That the Green Line Board:

1. Receive Report GLB2021-0975 for the corporate record.

HIGHLIGHTS

- This report presents an update on how The City will work to support businesses impacted by Green Line LRT construction. It includes a summary of consultation completed to date as well as an assessment of the applicability of the research, lessons learned, and outcomes of the targeted interviews conducted with businesses impacted by past construction projects.
- Administration was directed through a Notice of Motion (Attachment 1) to report back in advance of construction of the Green Line LRT project.
- This report is being brought to the Green Line Board for information.
- ***What does this mean to Calgarians?*** This report describes the framework for how The City will help businesses and communities prepare for and manage the impacts of Green Line LRT construction.
- ***Why does this matter?*** Green Line LRT project is the largest infrastructure project in Alberta's history. Construction will be ongoing for several years and it will be disruptive. With 15 communities and hundreds of businesses operating along the Council approved alignment from 126 Avenue S.E. to 16 Avenue N, and at a time when businesses are recovering from the impacts of a prolonged economic downturn and the global pandemic, The City is committed to planning proactively for business continuity, ensuring businesses are informed and working to develop initiatives to support businesses during Green Line LRT construction.
- Since Council's Notice of Motion, the project team have undertaken a comprehensive review of best practices and lessons learned from comparable projects (Attachment 2), as well as commissioned research through targeted interviews with impacted businesses (Attachment 3). The programs which are most successful have dedicated teams that are committed to clear and trusted communication, strong stakeholder relationships, and direct contact between citizens and the project team. This key learning is at the core of the business support program being developed for the Green Line LRT project.
- To date consultation with impacted businesses has been focused on meetings with Green Line's Business Insights Panel (BIP). Since launching in January 2021, the panel has met five times and members have had the opportunity to share local insights and help the project team to better understand business perspectives. Input is well aligned with the research and lessons learned review and emerging themes have been summarized in a What We Heard Report (Attachment 4) and been used to inform a set of draft program objectives (Attachment 5).

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- The approach to support businesses and communities is grounded in our understanding of stakeholders and business operations. Equipped with this information, The City is better able to develop proactive plans for business continuity and help to minimize construction impacts. This understanding helps the team to develop relevant communications, identify and begin working with stakeholders who will be most impacted by construction; it will be used to establish program priorities and will support evidence-based decisions around business support initiatives.
- *Strategic alignment to Council's citizen priorities:* A prosperous city, a city of safe & inspiring neighbourhoods, a city that moves, a healthy & green city, a well-run city.

DISCUSSION

The Green Line LRT is the largest infrastructure project in Alberta's history and will take several years to build. The project covers a length of 20 km and is made up of various infrastructure components – each with different construction impacts. The methods for constructing the project will be determined through the procurement process and means specific construction impacts may not be known for years. It also means that in some cases, the team may need to help businesses and communities to be prepared for different construction scenarios.

To guide development of Green Line's approach to supporting businesses during construction, a review of recent local, North American and international public transit infrastructure mega-projects was conducted. Of the projects reviewed, the most successful included effective and timely communications programs, resourcing that allowed for responsive issues resolution and for stakeholders to easily access project staff, opportunities for ongoing feedback, and programs where support initiatives were well aligned with the needs and interests of affected stakeholders or businesses.

There is no “one size fits all” business support program. Business support initiatives can generally be categorized into six types: 1) Access and construction management, 2) Business capacity building, 3) Marketing and promotion, 4) Procurement, 5) Workforce training, and 6) Financial support. Multiple initiatives can be implemented in combination and in response to specific construction impacts and changing stakeholder needs. A growing number of measures are focused on leveraging partnerships where possible.

The following three initiatives have broad applicability for the Green Line LRT project and are closely aligned with the outcomes of the targeted research conducted and input from the Business Insights Panel (BIP).

- **Access and construction management** initiatives will look to address traffic congestion and loss of parking, as these were among the biggest pain points for businesses experiencing construction. Attention to minimizing impacts on businesses recovering from the impacts of the pandemic was also a repeated theme.
- **Business capacity building** will be explored with additional input from the BIP and the broader business community, including an online discussion forum and digital marketing opportunities. These types of sharing platforms could allow for an opportunity to promote businesses be linked to The City's business hub.
- **Marketing and promotion** initiatives were felt to have broad applicability to Green Line businesses. Interview results indicated that making signage larger and more prominent

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near construction sites would be “very helpful” and signage and online marketing opportunities, including opportunities to link to local parking availability information was shared by members of the BIP.

As for the last three types, opportunities to support small and medium local businesses through procurement and workforce training initiatives have been identified. This aligns with the Community Employment Benefits requirements in the project funding agreement and will be advocated for during the development of the redefined procurement strategy. Financial support initiatives are more complex to develop and implement and can have broader impacts for The City beyond a single project. T team will focus on the first five of the six initiatives as those are considered most applicable support initiatives for Green Line business stakeholders.

As we continue to build the program and as more detailed construction information becomes available, we will use this information together with our understanding of the project and our knowledge of various business support programs to ensure that we are working to implement initiatives to support stakeholders most impacted by Green Line LRT construction.

Next steps:

- Building out Green Line’s business database (including business operations survey)
- Utility relocation project pre-construction plan for Victoria Park, Beltline and Downtown

STAKEHOLDER ENGAGEMENT AND COMMUNICATION (EXTERNAL)

- ☒ Public Engagement was undertaken
- ☐ Public Communication or Engagement was not required
- ☒ Public/Stakeholders were informed
- ☒ Stakeholder dialogue/relations were undertaken

To date, four components of the engagement program have taken place: 1) Initial online public engagement including program promotion and BIP recruitment, and information was shared at public information sessions for Segment 2 Functional Plan, 2) Regular meetings with the BIP, 3) In-person and virtual alignment “walks” with members of the BIP, and 4) Complementary research to learn from other Canadian business experiences.

Recruitment of the *Business Insights Panel* was initially targeted on Business Improvement Area and Community Association representatives. Engagement ensures local business perspectives are considered and is being used to inform the framework for the business support program. To date it has focused on a) providing program updates, b) informing program objectives, c) collecting ideas for business support and communication initiatives, and d) understanding community context, issues, needs and anticipated construction concerns.

The project team will continue to engage impacted businesses to share information about the project and to inform the initiatives throughout the construction of the Green Line LRT, and as the program evolves and COVID-19 challenges decrease, membership of the BIP will be expanded.

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IMPLICATIONS

Social

The Stage 1 Council-approved alignment connects with 15 communities and while Green Line will contribute to the overall social well-being of the city, during construction it will be disruptive. The project team is working to build strong relationships with Calgarians living and working in these communities and is committed to staying connected and helping Calgarians to prepare and manage construction.

Environmental

Through the access and construction management initiatives, the business support program will look for creative ways to maintain access and minimize impacts to parks and public spaces during construction. By promoting a healthy, active lifestyle, it can increase use of transit, reduce preference for car travel and help reduce GHGs.

Economic

As we prepare for Green Line LRT construction, our understanding of businesses and their operations will assist the project team to plan for business continuity. We will be focused on building business capacity while leveraging internal and external partnerships to support and promote impacted businesses and stimulate local economies in and around the Green Line LRT construction areas.

Service and Financial Implications

No anticipated financial impact

Green Line's business support program is funded as part of the Green Line LRT project. There is no impact to the current operating budget from this report.

RISK

If construction impacts are greater than The City anticipates due to construction complications or unanticipated impacts, then businesses may experience greater disruptions than they were prepared for. To mitigate this risk, a business database, including business operations survey and contact information, is being developed so we can plan for business continuity and contact an impacted business, share information with the team and advocate for the business in the event that an issue arises.

Expectations for what business support will look like need to be managed based on the level of disruption that is anticipated. To mitigate this risk, the project team undertook a significant lessons learned review and established a Business Insights Panel to understand potential impacts and which initiatives are most effective. Regular communication to gather feedback will ensure that the initiatives being implemented are supporting stakeholders and provide value.

If The City does not have the resources to adequately respond to and support impacted stakeholders, Calgarians may lose trust and confidence in the commitment to help prepare for and manage the impacts of LRT construction. To mitigate this risk, a dedicated team will communicate and engage with stakeholders based on the level of disruption they are likely to experience so stakeholders know what to expect, how to stay informed and who to contact with questions or concerns.

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ATTACHMENT(S)

1. Attachment 1 – Notice of Motion (NM2015)
2. Attachment 2 – Lessons Learned Report
3. Attachment 3 – Probe Research Report
4. Attachment 4 – What We Heard Report
5. Attachment 5 – Business Support Program Objectives

Department Circulation

General Manager	Department	Approve/Consult/Inform
Michael Thompson	General Manager - Green Line	Approve
Wendy Tynan	Director – Stakeholder Relations	Approve



THE CITY OF
CALGARY
CITY CLERK'S OFFICE

NM
RECEIVED

2015 NOV 12 AM 9:32

NOTICE OF MOTION THE CITY OF CALGARY
CC 661 (R2007-12) CITY CLERK'S *DN*

NM2015 – November 12

RE: Taking Care of Business During Construction of the Green Line

COUNCILLOR DRUH FARRELL

WHEREAS the approved corridor for the Green Line Light Rail Transit line travels through several important commercial and industrial nodes in Calgary;

AND WHEREAS there are several hundred businesses operating along the corridor;

AND WHEREAS the construction of the Green Line is estimated to take several years, with certain areas subject to heavy disruption;

AND WHEREAS any disruption to these business will be detrimental to the local economy;

AND WHEREAS it is critical to keep businesses open and accessible during construction, with disruption kept to a minimum;

AND WHEREAS The City of Calgary can learn from the successful and innovative approaches as well as the unsuccessful approaches used by other North American cities during similar construction projects;

AND WHEREAS successful approaches may include communication, issues resolution, marketing and retail consulting, promotion, business-oriented workshops, and procurement opportunities;

NOW THEREFORE BE IT RESOLVED that City Council direct City Administration to consult with the impacted business community to develop a Business Support Program, and report back to the Standing Policy Committee on Transit and Transportation, prior to commencement of construction of the Green Line.

Signature of Member(s) of Council

Business Support Programs and Initiatives Lessons Learned Summary

Summary

A review of recent local, North American and international transportation infrastructure mega-projects including public transit, Light Rail Transit, subway and Bus Rapid Transit projects was conducted. Of the projects reviewed, the majority had some form of program or initiatives aimed at supporting businesses and communities impacted by construction. The types of programs and the ways they were implemented varied, but what was largely consistent across the examples was that those which were most successful included effective and timely communications programs, resourcing that allowed for stakeholders to easily access project staff and to support responsive resolution for emerging issues, and finally, programs where the intent of the support initiatives were well aligned with the needs and interests of affected stakeholders or businesses.

Historically, the focus of many transportation infrastructure mega-projects has been on project delivery objectives of completion on-time and on-budget; there was often less attention given to the social and economic impacts associated with construction and the effect these projects have on stakeholders and the communities where they were built. Today, transportation agencies, local governments and partners working to deliver these large infrastructure projects are more aware of the disruptions and impacts that construction can have on stakeholders and communities. While there are limits to what can be mitigated, there is typically greater consideration of these impacts during the construction phase of projects, more pre-construction planning and consideration, and a growing number of measures are being incorporated into projects to support impacted stakeholders, including leveraging partnerships where possible.

From our review, we have found that business support initiatives can generally be categorized into six types:

- (1) Access and construction management
- (2) Business capacity building
- (3) Marketing and promotion
- (4) Procurement
- (5) Workforce training
- (6) Financial support

While each of these types of initiatives provides some measure of support, they are often implemented to achieve different project outcomes; using different tools and expertise. Their applicability to projects depends on a number of variables including things like the structure of the contract, scale of the project, types of stakeholders impacted and amount of funding allocated. What we have observed in the projects reviewed is that multiple initiatives are often implemented in some form or combination but there is no one solution to replicate. Initiatives and programs are often developed over the course of construction and in response to changing stakeholder needs.

Despite business support programs being more common, as reflected by the greater variety and scope of program offerings, with any large infrastructure project there is finite overall funding, and business

and community support programs typically operate with a very small portion of overall project budgets. Business support programs with direct financial assistance programs that offer grant and loan programs to support impacted businesses often have the largest budgets and more consistent stakeholder impacts to consider (e.g. a number of projects seem to be built along corridors that have similar characteristics such as an existing commercial corridor populated by retail, personal service, food and entertainment businesses etc.). Other support programs that are focused on business marketing and promotions, access and construction management and business capacity building are usually more modest and benefit from using different types of initiatives to address a variety of stakeholder impacts. Regardless of budget constraints, it is important that consideration in the evaluation, design and delivery of business support programs is undertaken to ensure good overall value for investment and that the most effective support outcomes for impacted businesses and communities are realized.

Lessons Learned

Overview of Projects Reviewed

To support this Lessons Learned review, research into business support programming associated with large infrastructure projects has been undertaken in a variety of ways over several years. The work includes procured research and targeted interviews with impacted businesses, student research projects, as well as staff research into business support initiatives and programs and a staff review of post-project lessons learned assessments and stakeholder experiences with recent City infrastructure projects in Calgary and other Canadian cities.

While our research indicated a range of funding for business support programs and initiatives across projects, there were research limitations when business support program financials were assessed. In particular, it is not always known whether a project incorporated a number of other business support initiatives or measures beyond the one being researched and secondly, it is not easy to discern whether staff resourcing costs to administer these programs are reflected in the publicly available program budget information.

The following sections provide an overview of key learnings from other business support programs and initiatives.

A Strong Program Foundation: Communications, Community and Stakeholder Relationships

Across projects, there is considerable variety in the types of programs, tactics and initiatives that are developed to support businesses. This variety and range of tactics reflects the diversity of geographies and stakeholders that these large infrastructure projects impact and underscores that there is no “one size fits all” business support program that can be implemented for all projects. Having said that, business support programs or initiatives that were most successful, or perceived to be most successful by citizens, had two foundational components: a well-designed and implemented communications program and established relationships and opportunities for two-way dialogue with impacted

stakeholders. Programs that were able to deliver on these key communications and stakeholder relations measures, often had much higher satisfaction ratings from stakeholders regardless of the severity of the impacts that were experienced or the efficacy of the business support initiatives or tactics employed.

Key Lessons Learned in this area include:

- **Establish a strong communications program** - Strategic communications programs provide high quality information and use tactics to connect with strategic partners and networks to ensure project understanding.
- **Establish reliable source(s) of project information** – a communications program should remain intact, supportive and accessible for the duration of the project program so that stakeholders know how and where to find the information they need to be informed.
- **Make communications accessible** – it is critical to ensure that information about the project (e.g. construction impacts) and the support program or initiatives are straightforward, accurate and easy to understand (e.g. plain language, multi-lingual, culturally sensitive etc.)
- **Contextually aware** – The communications program should be attune to the current external climate, in-step with any wider public communications of the jurisdiction, and attune to the specific context and interests of the stakeholder businesses/participants.
- **Accurate and timely** - Communications about construction impacts should be clear, accurate, with relevant details and provided well in advance of the impacts.
- **Be honest and set the right expectations** - Communications should “paint a picture” of what construction impacts will be experienced. Potential “worst case scenarios” are better to provide than scenarios and details that are overly optimistic or ambitious (i.e. do not downplay potential impacts or their severity, do not provide overly ambitious completion dates, do not provide construction information or milestones that may be irrelevant to stakeholders etc.)
- **Share details that will help stakeholders prepare** - Communications about the impacts must provide adequate details and dates (e.g. what types of service outages will occur, specifics of the mobility network access impacts, nuisance impacts such as noise and vibrations etc.) so businesses can begin to prepare, plan for and implement adaptive strategies.
- **Celebrate and communicate progress** – share project wins/successes that are relevant to affected stakeholders.
- **Seek input and participation from affected stakeholders** - Effectively target and engage the intended business stakeholder audience for input into the development of programs and initiatives - business support programs tend to be most successful when there is higher input and participation from affected stakeholder businesses. Effective communications programs often foster greater stakeholder participation.
- **Maintain regular contact with impacted stakeholders** - Project communications channels should be established to ensure that there are regular opportunities to receive feedback and share information with stakeholders.
- **Maintain an up to date stakeholder database** – Ensure there is accurate contact information available to enable direct outreach when construction plans change and to confirm designated representatives to be sure that direction is being provided by those with authority.

Attributes for Program Success

Through the review, there were other key attributes that influenced the success and effectiveness of specific business support initiatives and the program overall, specifically where the program and initiatives were:

- Informed by stakeholder input
- Contextual for stakeholders and specific to the construction impact(s)
- Adequately resourced
- Leveraged through partnerships

Informed by stakeholder input

Business support programs that received the highest satisfaction ratings from businesses were those that were organized with ongoing opportunities for stakeholders to connect with other stakeholders, to easily access program administrators, and where stakeholders believed their input was meaningfully considered to inform decision making around the business support program or initiative.

There is a spectrum of engagement and for some initiatives it makes sense for stakeholders to have more or less impact on the decision being made. Involving stakeholders or including them in a collaborative process is one indicator of an agency's willingness to support. The value of meaningful engagement is that stakeholders feel heard, are able to communicate their interests and have an improved understanding of the decisions made. An added benefit of collaboration with stakeholders is the likelihood that the programs and initiatives implemented will have greater relevance for impacted businesses.

Key Lessons Learned in this area include:

- **Collaborative program or initiative development** - Programs that incorporate collaborative approaches often received the greatest stakeholder "buy-in" for proposed program initiatives. These programs also benefit by having more vested stakeholders who are willing and likely to work toward solutions, offer insight and even champion program initiatives or solutions.
- **Set clear parameters for what is open for input** – Programs which embody collaborative stakeholder participation are not required to adopt or pursue initiatives that may be infeasible or out of scope, simply due to stakeholder advocacy or request; these parameters should be identified and communicated at the outset to set appropriate expectations.
- **Report back on input considered** – It is just as important to report back on what you will do as it is to report back on why you could not do something.
- **Value in hearing different perspectives** – Communities and stakeholders are diverse in projects that impact different communities and types of areas. Ensuring that discussions and input into the development of the program is inclusive of different stakeholder perspectives will allow the program or initiatives to be more relevant.
- **Business forums or venues to share experiences, promote ideas and solutions** – Creating opportunities for impacted businesses to come together, learn from each other and generate ideas to support each other. Opportunities to connect (or where stakeholders may connect)

stakeholders often serves as a form of social, economic and community capacity building and resiliency.

Contextual for stakeholders and specific to the construction impact

Programs and initiatives that are tailored to or designed in consideration of the context and characteristics of the businesses or areas they intend to support often have success and receive higher satisfaction ratings from stakeholder businesses – regardless of an initiative’s efficacy. For example, a public marketing campaign initiative to “shop local along the alignment” may have significant benefit or value (perceived or real) in supporting small scale independent retailers and restaurateurs through a period of adjacent construction; whereas the same or similar marketing initiative employed in a different context such as when construction is in an industrial setting adjacent to manufacturing businesses - may have little to no supportive value for these businesses.

Successful programs and initiatives are those that have planned proactively and accounted for influencing factors, including, the local context and physical conditions where the project is being constructed as well as macro-economic conditions (consumer trends, interest rates, inflation, unemployment etc.), and environmental conditions (including factors influencing public health and wellness such as pandemics, etc.) Acute awareness of the intended objective(s) that an initiative seeks to support is also needed. For example, a marketing campaign for a series of retail business encouraging citizens to shop locally along the alignment, may have less value for these businesses if they have already shifted their retail efforts to on-line sales in response to other influencing factors. A more informed support program would have likely been attune to this information and tailored a marketing campaign that was more in keeping with stakeholder interests, such as encouraging customers/consumers to shop on-line.

Key Lessons Learned in this area include:

- **Need to be aware of the many factors that can impact businesses and focus on what we can control** – Macro-economic influences and local impacts should be considered.
- **Deeper understanding of operational impacts** – Getting to know stakeholders and their business operations can help to identify (and implement) more effective support initiatives to address construction impacts.
- **Maintaining a detailed (and current) stakeholder business database** – detailed and current information about stakeholders increases the ability to implement and monitor the efficacy support initiatives.
- **Balancing interests and impacts** – Understanding dependencies between solutions (e.g. expansion of short-term on-street parking for businesses may have negative impacts on residential on-street parking if this is not considered in a way that is balanced)

Adequately resourced

In addition to ensuring the team is adequately resourced to maintain regular contact with stakeholders and to resolve issues and enquiries promptly, adequate program resourcing is necessary to: 1) design and implement programs and initiatives effectively, 2) be equipped to respond to stakeholder feedback regarding initiatives and when feasible, to consider and action any adjustments or changes, and 3) have

capacity to sustain support initiatives for the duration they are planned for and even extended in the event of construction delays etc.

Key Lessons Learned in this area include:

- **Ensure staff are well versed and vested in the particular area they are supporting** - Ideally stakeholder relations staff have a deep knowledge of the areas they are supporting and if feasible a direct connection to the areas.
- **Stakeholder businesses appreciate an accessible, direct and consistent point of contact** – If feasible, staff resourcing should be organized to allow for 24/7 accessibility and direct access for impacted stakeholders (e.g. Email and phone contact of a staff member point of contact(s) who are already known to the stakeholder).
- **Develop a program framework where changes or adjustments to initiative(s) based on feedback may be considered and implemented efficiently** – A program where continued and extensive engagement with stakeholders is possible before, during and after construction.

Leveraged through partnerships

Another common aspect across most of the programs is to leverage opportunities for partnership with other existing programs or supports where possible. Partnership opportunities present the ability to maximize efficiencies, reduce program costs and draw on existing expertise. For example, a project delivery team may partner with an existing financial grant program or business capacity building program. Partnerships may be developed with an existing community agency, local government or chamber of commerce that offers programs aimed at supporting businesses. The purpose being to leverage existing programs, not recreate them.

Key Lessons Learned in this area include:

- **Partner in delivery of initiatives that are mutually beneficial** – Assisting businesses to access an existing program where capacity building support is offered may not only help the business in weathering current construction impacts, but may also help the business become more resilient to other existing or future stressors - thereby potentially also fulfilling objectives of the partner program.
- **Cost-sharing and construction coordination** – This type of partnership coordination allows for potential construction efficiencies, and improved mitigation strategies (e.g. more efficient, comprehensive and effective) to be implemented.
- **Partner to support a common interest** – e.g. safety awareness, school education, community building. Partnerships present an opportunity for the partner with the greatest capacity (e.g. expertise, experience, networks, and resources etc.) to lead or provide guidance and expertise. Programs and initiatives that can draw on experience and existing capacity - often have greater likelihood of success.
- **Room for everyone to be successful** – Delivery partners – Industry partners, when common interests can be aligned, and effectively incorporated into the program's key communications, increased partnership buy-in often results as there become shared objectives. (e.g. helping the development industry looking to build along the alignment as increased development may contribute positively to transit ridership objectives etc.)

Business Support Initiatives

Based on the research completed, business support initiatives and tactics can be organized into six general categories:

- (1) Access and construction management
- (2) Business capacity building
- (3) Marketing and promotion
- (4) Procurement
- (5) Workforce training
- (6) Financial support

Access and construction management

Initiatives that focus on alternate access, servicing and business continuity plans to mitigate construction impacts have become common practice with large-scale infrastructure construction projects. Many businesses, such as retailers, food and entertainment and personal service businesses rely on customer access and street frontage. Shipping and receiving of goods and supplies as well as waste management are essential to the operations of most businesses, and access to utilities for power, water, sanitation and telecommunications are essential services. As such, access and construction related impacts to businesses can significantly affect and disrupt their operations. Initiatives geared to providing mobility network detouring and access solutions or improving aesthetics around construction sites can be effective, as well as initiatives that provide for off-site temporary parking solutions to offset the loss of public on-street parking.

Access management and construction mitigation initiatives vary based on the characteristics of the construction project, but their objectives are generally to establish public awareness that the impacted businesses are still “open for business,” to implement mobility network access solutions that will enable continued access to businesses, and implement any other strategies or tactics that may minimize or offset disruptive construction impacts, thereby allowing businesses to continue to operate as successfully as possible from their existing locations.

Development of a regular street sweeping or window washing campaign for businesses adjacent to construction, a comprehensive wayfinding signage plan to help citizens navigate and access businesses adjacent to a construction zone, and application of construction hoarding adorned with creative or artistic graphics to improve aesthetics around a construction site are all examples of these types of initiatives.

Independent, smaller scale retail, food and personal services business are often targeted by these support initiatives given their reliance on walk-in customer traffic and the significant disruption caused when these activities are impeded by construction. In many of the lessons learned, construction activities took place along streets and corridors where these types of businesses are commonplace (e.g. commercial main streets).

Access and construction management support initiatives are generally applicable across the majority of businesses types, particularly when these initiatives can be tailored to meet business needs. But while these types of initiatives can go a long way to support businesses during construction, they may not

achieve their intended support objectives if offered in isolation without other supporting initiatives, such as effective marketing campaigns and promotions. The success of these initiatives may also be challenged by the overall scope and scale of the construction activities and their duration.

Examples of access and construction management initiatives:

- Offsetting the impacts of additional dust and debris generated by a construction site by implementing a street and sidewalk cleaning program on adjacent streets.
- Offsetting the loss of on-street commercial parking (due to construction) by leasing a nearby private parking lot for patrons of area businesses, who would have regularly used on-street parking to use.
- Use of creatively designed construction hording around a construction site as a way to animate the area and improve overall aesthetics in proximity to the construction site.
- Coordinating a schedule with a manufacturing business that is impacted by a construction site access closure, whereby project construction is temporarily ceased and the access is reopened at a set weekly time to allow the business to continue receiving their regular weekly shipment of goods.

For a project example of this initiative, please see Appendix A of this attachment.

Business capacity building

Businesses impacted by construction often face decreases in revenue as customers may be deterred by reduced pedestrian or vehicle access, a lack of parking or a less hospitable or welcoming streetscape environment. Business capacity building initiatives are intended to help smaller sized businesses prepare for and endure construction impacts by making available consulting services to business owners in areas such as strategic planning, financial recordkeeping, marketing and use of technology to build their capacity. They are focused on helping businesses improve their own adaptive capacity. These initiatives are often utilized in projects where construction impacts an area (e.g. streets and corridors) where there are a number of smaller scale retail, personal service and food services.

Specific support strategies may include assistance for businesses with new marketing strategies to attract customers such as website development, special events, development of deals or promotions and strategic analysis to help businesses improve their understanding of their existing customer base and/or how to seek or attract new or different customer demographics. Strategies are often geared toward helping businesses diversify their revenue sources to increase resilience. For example, assisting a restaurant to shift to or increase their takeout, delivery or catering services to make up for loss of walk-in foot traffic as a result of project construction.

Small, family-owned independent businesses with one location tend to be the most vulnerable to construction disruptions. In some cases, these businesses have relied largely on cash transactions and bookkeeping may not be automated. Business capacity building programs can be particularly helpful for these businesses, as assistance with recordkeeping may help a business document construction-related losses which for those projects that have financial support programs, may enable them to qualify for other supports such as grants or loans. Business consulting services in some projects have been funded by the business support program and in others, in combination with other government funding or

programs, grants from private foundations or funds from local chambers of commerce or community development organizations.

Smaller scale, independent business are most likely to benefit from business capacity building initiatives. These businesses often do not have the resources or supports that larger businesses may have to draw on. As such, these initiatives can help to develop proficiencies and strategies to cope with project construction impacts. Additionally, these improved skills and proficiencies may also contribute to longer term business capacity improvement and overall resilience. Business capacity building initiatives are typically well-suited to projects that impact corridors, streets or areas where smaller independent businesses are populated.

Program success for these types of initiatives relies on stakeholder business awareness and participation. Businesses need to be made aware of these programs and know how to access them well in advance of construction in order that they may be effectively developed and implemented by the participating businesses. Typical business capacity building initiatives may have less relevance for larger scale businesses, but other adaptive business practices like transportation demand management strategies (i.e. remote working) could be employed by larger businesses (e.g. office buildings) where flexible work options could be used to support business continuity and reduce congestion in areas under construction. For this type of initiative, there needs to be alignment with interests and business models for there to be uptake.

Example of a business capacity initiative:

- Hiring a retail consultant with expertise in web based on-line retail to work with interested impacted retailers in transitioning elements of their business to an on-line sales model.

For a project example of this initiative, please see Appendix A of this attachment.

Marketing and promotion

Marketing initiatives to support businesses affected by construction are used frequently. Transit agencies, governments and impacted businesses recognize the importance of marketing to inform the public that businesses are open during construction. However, the success of these campaigns can vary. This may be due to a number of factors including the type and scale of construction impacts, the effectiveness of the marketing strategy itself, the marketing medium(s) utilized, or the degree to which the campaign or strategies are tailored to impacted businesses and their business interests.

Initiatives that are conducted in partnership between the government/transit agency leading the project and local businesses or business networks is common. These partnerships enable expertise and capacity to be combined so that marketing strategies are devised using existing marketing expertise, local business knowledge and experience, and intimate awareness of how construction impacts will affect businesses. This expertise is paired with government capacity and expertise to communicate with broad audiences.

Marketing campaigns and promotions can be tailored (or targeted) to specific businesses or business areas along the alignment as well as to the needs or interests of these businesses in relation to specific construction impacts. Typically marketing and promotional campaigns are targeted to support businesses that rely heavily on direct in-person customer patronage and access (e.g. retail, food and

personal services). They are often used for construction within and along corridors, streets and areas where these types of businesses are prevalent. Marketing initiatives and campaigns that elicit a “call to action” such as to visit, explore and support businesses in an area experiencing construction may have greater impact than campaigns used to generally inform the public that businesses remain open or notify of an upcoming event in the area.

Businesses across sectors and industries can benefit from marketing and promotional initiatives. They are adaptive and flexible, allowing for targeted support to be provided. The flexibility marketing and promotional initiatives is of particular importance with large-scale transportation mega-projects where there are typically a range of construction impacts and a variety of businesses. Marketing and promotion initiatives can be focused on supporting different businesses, at different times or stages and for different reasons as construction warrants and/or business needs inform.

Certain campaigns and promotional initiatives can be relatively costly, so anticipated value in relation to expense should always be considered. For example: How many businesses might a campaign support? How will they be supported if the campaign is successful? How and what will it take to deliver a marketing campaign or promotion that meets business objectives? Are there alternative marketing or promotion mediums or approaches that might achieve the same intent?

Examples of Marketing and Promotions initiatives:

- Green Line partnering with a local Business Improvement Area to sponsor or co-promote a community street festival or market event where local area retailers including those who are currently experiencing impacts of construction can participate.
- Organizing, promoting and facilitating construction tours for the public as a way to not only educate people about the Green Line project including the impacts of construction on stakeholders and communities but also to draw people to areas that are currently experiencing construction impacts.
- Featuring/showcasing a business that is impacted by construction on a Green Line project webpage.
- Working with businesses in an impacted area to develop unified special events or sales promotions that encourage people to visit an area and shop.
- Paying for/running a radio ad with a “call to action” for citizens to shop and support impacted businesses in a specific area along the alignment.

For a project example of this initiative, please see Appendix A of this attachment.

Procurement

Procurement initiatives or strategies are used to encourage a particular behaviour or activity that benefits an impacted business, community or member of a certain socio-economic group. These can come in the form of contract requirements, incentives and penalties based on performance, or specific initiatives and how this is approached, can vary considerably from one project to another. For example, there may be requirements set out for a contractor to source local materials, supplies and/or services for the project in order that the project investment benefits local businesses and employees. This could also be implemented through an incentive (i.e. credits for performance), or through a business support

program by incorporating socially oriented procurement practices that are focused on supporting businesses impacted by project construction.

How a project may approach the incorporation of such initiatives will be informed by laws, policies, as well as trade and other agreements. Where there are funding agreements with different orders of Government, these initiatives may be implemented in response to obligations set out in those agreements. For many Canadian infrastructure projects for example, there is a requirement for projects to implement Community Employment Benefits as set out by the Government of Canada.

Procurement initiatives that are focused on construction and traffic mitigation management measures often provide benefit to stakeholders, by way of impact reduction or mitigation and are therefore typically considered as stakeholder-oriented support initiatives. These requirements are typically incorporated in project agreements with the objective that the contractor becomes directly responsible to minimize and address a range of impacts that are associated with construction. A thorough understanding of stakeholder businesses including their interests, needs and operational characteristics helps to inform contractors which mitigating measures may be most relevant and feasible to implement both from the perspective of constructability impact and value for the businesses.

Financial incentives or penalty programs may also be implemented by the transit authority or lead agency as a method to further encourage contractors to minimize construction disturbances. These programs reward contractors for incorporating mitigation strategies beyond those included within the contract. Conversely, some projects may institute financial penalties for the contractor when adherence to expected construction impact mitigation measures are not upheld. To be most effective, these programs should have review methods which reward incentives only if the initiative in fact provides benefit to impacted businesses. Furthermore, there are also certain circumstances where these initiatives, may create little value for impacted stakeholders. For instance, with contractor penalty programs, there may be occasions where a contractor deliberately chooses to forgo implementing a mitigation measure as it may be more cost effective for the contractor to simply accrue financial penalties instead. Program complexity, potential increased project costs associated with rewards and the resourcing requirements that may be necessary for monitoring such programs should be factored when considering implementation of these types of procurement initiatives.

Social procurement initiatives are intended to encourage project procurement activities, when feasible that can be supportive of a wide range of local businesses. These initiatives may range from directing the procurement of materials from local suppliers and the use of local subcontractors, to the procurement of a wide range of other goods and services necessary to support the project, from businesses located within a certain defined proximity to the construction project. If there is appropriate flexibility with these programs, so that the project team is not absolutely bound to procure from local sources (particularly if goods and services are not available and/or it is simply not feasible/reasonable from a cost perspective), there appears to be little downside to these types of initiatives.

Examples of procurement initiatives:

- A requirement that the project contractor develop detailed construction mitigation plans prior to construction which detail how particular impacts will be addressed.
- A requirement that the project contractor, provides documentation demonstrating that they were able to communicate with all impacted landowners and businesses adjacent to a construction site prior to construction to communicate the anticipated impacts and expected mitigation initiatives.

- A requirement that the project contractor establish a plan for how they will support local and impacted businesses during construction
- A requirement that the project contractor employ a specific proportion (e.g. %) of their overall workforce with graduates from specific apprenticeship trade programs.
- A business support program may order catering from an impacted local restaurant to serve at a project information session/open house, procure the services of an impacted local print shop to produce promotional flyers associated with a local business marketing campaign initiative, or rent the event space of an impacted business as a venue to host a business stakeholder meeting or public open house, etc.

For a project example of this initiative, please see Appendix A of this attachment.

Workforce Training

Although workforce training initiatives are not necessarily directly focused on supporting businesses impacted by project construction, a number of large scale infrastructure projects have implemented or supported existing workforce training programs as longer term community oriented socio-economic support strategies. Some measures are developed as a direct result of requirements in the project funding agreements and others are implemented as part of a broader corporate initiative or program.

Generally, workforce training programs are aimed at training local labour forces and providing employment opportunities in construction. These programs are often directed toward disadvantaged socio-economic groups with objectives to ameliorate community issues such as unemployment, poverty and crime. In addition to supporting program participants, workforce labour programs can bring benefit to businesses along the infrastructure corridor, improve community image, create a larger customer base for existing businesses and serve as a form of mitigation for those impacted by the project.

Governments and transit authorities have used opportunities to integrate with existing educational and apprenticeship construction trade programs or to establish new programs that are linked to the project at-hand. In some cases, these programs are implemented via formalization in the construction contracts and delegated to the contractor. Aspects such as the proportion of labour required from select communities, participant eligibility criteria, remuneration (wage and benefit) requirements and location of training (e.g. at the project site or at existing trade schools etc.) are all aspects of these programs which can and have been mandated in project contracts.

In the broadest sense, communities and individual citizens alike benefit from when they have the ability to be and are gainfully employed. Although workforce training programs are not necessarily focused on targeted assistance to specific businesses, if these types of programs are successful there may be longer term benefits for certain businesses or business sectors, such as the construction industry.

A larger local labour force with training and skills in certain industries such as construction, may have positive long term benefits for that industry, including having greater future availability to draw on a locally trained and skilled labour force. Furthermore, with a broadened local labour force and increases in employment, there may be economic spin-offs that occur for local businesses – particularly if there is increased consumer capacity within local communities. While it may be difficult to correlate direct economic benefit with improved community image or morale due to increased levels of community

employment, improved community morale and optimism that may be bolstered by these employment gains should not be discounted. Improved morale and community image may translate into tangible financial benefits for communities by way of increased community re-investment.

When established and administered effectively, workforce training initiatives are reported to be highly successful and prove to be extremely beneficial for individuals who participate in these programs. However, concerns have also been expressed particularly in circumstances where the implementation of workforce programs have been formalized into construction contracts, and delegated to the contractor, but where performance targets were ultimately not achievable. Concerns have arisen in cases when contractual mandates have included the proportion of labor that should come from local communities (or other specific eligibility requirements), and there are deficiencies in the amount of trained or eligible individuals available to meet contractual requirements.

These programs and initiatives are also typically offered in partnership with existing local construction apprenticeship trade schools or programs. In some occasions, construction apprenticeship programs are established as a component of the transportation project itself. In any case, establishment of these workforce training initiatives must occur well in advance of project construction commencement so that an available pool of apprenticeship candidates can have time to participate and be eligible for employment in the project.

Many construction project based workforce training programs and initiatives are undertaken by transportation agencies operating in large metropolitan regions where oversight of multiple large-scale transportation projects is planned or are already underway. As such, the significant investment in project development, administration and partnerships can be justified as these programs/initiatives are replicated and applied across multiple projects within a region.

Examples of workforce training initiatives:

- Developing community initiatives such as marketing or educational campaigns in residential areas where the Green Line project will be built such as Millican, Ogden, Douglasdale and Ramsay to encourage and bolster local community member enrollment in Green Line apprenticeship programs.
- Establishing or partnering with an apprenticeship program, where participants have the opportunity to progress from receiving basic construction work job training and certifications, to skilled trades training, and on to any relevant supporting higher education opportunities.

For a project example of this initiative, please see Appendix A of this attachment.

Financial Support

Financial support programs typically consist of low interest loan and grant programs to compensate businesses for disturbances associated with a project's construction activities. The objective of financial support programs is on business survival. Specifically, that provision of direct financial support to businesses who experience decreased or declining revenues due to project construction will enable businesses to survive through the construction period rather than close down or relocate. Direct financial assistance programs are the most challenging support strategies to implement as they are often the most complex in terms of their funding sources, implementation, administration and program evaluation.

These programs are often administered by transit agencies and municipal governments in partnership with local banks, non-profit organizations, and foundations. In these programs, loans are often dispersed either as “microloans” to support short term or immediate business needs or as higher amount loans for capital improvements. In most programs, the loans have greater flexibility and lower interest rates than typical lending agencies. In certain cases, loans are forgivable if a business can meet certain provisions, such as remaining in business at the existing location for a select period of time post project construction. Financial assistance programs may have greater benefit when other business support initiatives are also in place, particularly those which may offer support and guidance to businesses on how loans or grants may be best utilized.

There is currently one Canadian example of a financial support program in Montreal. This program provides compensation of up to a maximum amount of \$30,000 per year with some limitations. It is applicable city-wide, applies to a broader range of project types (not a single project) and is funded through both municipal and provincial funding sources.

Other forms of non-direct financial compensation initiatives that provide financial savings to businesses impacted by construction may also exist. However, these types of initiatives were not encountered as specific examples in the Lessons Learned review. These initiatives may include potential tax abatement initiatives and the removal or abeyance of various business licensing fees and/or permitting fees for impacted businesses. However, as the agencies delivering these construction projects do not typically oversee these programs, partnerships and coordination with the municipal corporation(s) who typically oversee these programs is also necessary. As such, to establish and implement these initiatives, it is critical that the implications and ultimate feasibility for these types of initiatives be reviewed not only from the project perspective but also in consideration of the perspective and implications these initiatives may have on the municipality.

These programs are also usually targeted toward smaller sized, independent retail and service sector “mom and pop” type businesses - as evidenced through the business eligibility criteria that is often associated with these programs. To be eligible for these initiatives, businesses often need to be located adjacent to or in close proximity to the construction project. If located further afield, businesses typically must be able to demonstrate that negative financial impacts will be experienced as a result of the construction project.

Loans and grants are often provided with the intent to serve as “bridge” support funding for businesses during a period where decreased revenues are being experienced. Other loans and grants are provided for businesses to make capital improvements to their businesses, which may serve to counteract certain impacts associated with project construction such as improving a businesses’ main entryway façade.

Loan and grant programs may be viewed as successful in circumstances where eligibility criteria for businesses is lenient, the steps to participate are straightforward and program accessibility for businesses to participate is high. When these aspects are not in place, there was often far less business participation. The evaluation of program success can prove to be elusive as the criteria for measuring success is often variable. Business participation levels, the ability for businesses to repay loans versus default, the longevity of businesses that received loans and the ability and decision for businesses that received loans to remain in situ during and after construction are all varied but valid evaluative criteria.

In many of the programs reviewed, there was considerable variability reported with regard to the above criteria, making it challenging to evaluate program success. Additional concerns with these programs include reports from businesses that the maximum loan amounts per business in many programs were often not believed to provide adequate support. Program ineligibility for certain impacted businesses

that differ from small scale retail, food and sector businesses, was also noted where narrow business demographics targeted by these programs may preclude other businesses from participating and receiving some form of support. Maximum loan amounts that were typically granted may be assistive to certain small businesses but may have little to no supportive impact for other larger or different businesses and given the current economic context, these amounts may not be enough to support businesses already struggling. Finally, the organizational and administrative costs associated with establishing and administering financial support programs and initiatives (including partnering with other agencies) are often substantial.

Examples of financial support initiatives:

- A low interest loan in the amount of \$25,000 provided to an independent convenience store that is located immediately adjacent to a construction site where access to this business has been impacted considerably due to a required prolonged (e.g. 7 months) street closure. To be eligible for this loan, the business would have been required to demonstrate that they have experienced decreased revenues, based on financial records prior to construction.
- A \$15,000 grant provided to a small retail clothing store located adjacent to a construction site to make storefront improvements, such as exterior signage and lighting improvements as a way to offset the adjacent construction impacts and improve overall storefront presence and visibility.

For a project example of this initiative, please see Appendix A of this attachment.

Discussion and Applicability for Green Line

The alignment runs through areas that vary from suburban low density areas to high density urban areas and the city's downtown core, within which there is a wide range of stakeholders and a diversity of business types that will be considered as we build out the program and determine applicability of specific initiative types. Phase 1 of the Green Line LRT project covers a length of 20 km, and passes through 15 communities, with hundreds of businesses operating within one block of the Green Line LRT alignment between 126 Avenue S.E. and 16 Avenue N. The project is made up of various infrastructure components – stations, bridges, tunnels, surface running and elevated track, as well as buildings, roadworks, pathways and utility relocation works – each of these will have different construction impacts.

The communities and areas that Green Line will connect with and benefit includes low density residential communities, industrial areas, regional recreation and commercial destinations as well as established communities, main streets and the city's downtown core and high density neighbourhoods. Some of the stakeholders in proximity to the alignment are residents living in houses, apartments and care homes, large industrial operations, local, small-scale retail and service providers, as well as mixed use commercial, residential and high density office areas.

When we reflect on the lessons learned through our research and the applicability to the development of Green Line's approach for supporting businesses, there are some initiatives that are entirely applicable, others that may have some opportunities worth exploring further or that do not appear to have broad applicability to the project. To evaluate which type of business support program initiatives may be most applicable to Green Line, a detailed review of programs and initiatives and the projects

they were associated with was undertaken. The objective of this review was to learn about the details of various business support initiatives, the characteristics of the transportation projects they were associated with and the context within which these projects and support initiatives were delivered. Consideration was given to type and scale of project, construction timelines, means and methods of construction, business and community context/characteristics along the alignment, overall project budget, and budget allocation to initiatives. The following questions were used to allow for a more consistent comparison between initiatives:

- Who benefits from these initiatives?
- Which types of businesses are they typically targeted to?
- What are these initiatives used for?
- In what context do these initiatives work?
- Are there any shortcomings?

Assessment of Applicability to Green Line

Access and Construction management: Given the diversity of businesses along the Green Line alignment, many construction and access management initiatives can be replicated and implemented cost effectively. These initiatives can also be easily monitored and modified and even abandoned easily in response to changing construction conditions, stakeholder feedback, or simply if they are no longer working to address their intended purpose effectively. In some instances, to implement certain initiatives Green Line will rely on support from City Partners and City business units and departments when partnerships are necessary to implement initiatives. In addition to these initiatives, transportation management, access and construction mitigation, business continuity planning and stakeholder liaison and communications provisions will continue to be considered and advocated for as part of Green Line's procurement strategy. It is anticipated that good opportunities to minimize construction impacts on our business and community stakeholders will be made possible when access and construction management initiatives can be implemented in combination with procurement provisions.

Marketing and promotions: Most types of businesses across sectors can benefit from marketing and promotional activities as they are adaptable and have the potential for broad applicability across Green Line. Marketing campaigns and promotional support initiatives are often the most effective when created in partnership with local businesses or local business representatives. As several Business Improvement Areas along the alignment currently exist (Crescent Heights Village, Chinatown, Calgary Downtown Association, Beltline, Victoria Park, and Inglewood), partnerships with these associations will be leveraged to support the development of area specific marketing and promotional campaigns.

Building on opportunities for shared and collaborative marketing and promotional initiatives for businesses impacted by Green Line construction, a number of other agencies and programs in Calgary also exist with interests that are focused on supporting businesses and the local economy (e.g. City of Calgary - Business and Local Economy, Resilient Calgary, and Downtown Strategy, Calgary Economic Development, Calgary Chamber of Commerce, Tourism Calgary). Opportunities for partnerships and assistance with marketing and promotional initiatives with these groups may also exist and will be explored.

Business capacity building: Business capacity building initiatives in support of large-scale transportation projects can be successful in helping independent and smaller size businesses (retail, food, personal

services) that are impacted by construction to survive fluctuations in revenue and attract customers. These initiatives are often provided free of charge in one-on-one or workshop formats. With recent widespread shifts toward on-line virtual meetings and seminars, there may be newfound opportunities for Green Line to offer these initiatives widely in a relatively cost-effective manner.

Helping Calgary businesses develop adaptive capacities and resiliency by becoming more equipped to endure impacts associated with Green Line construction as well as other future shocks or disruptions is positive. There is current momentum and corporate and community support for helping local businesses and a number of existing resources have been assembled on The City's Business Hub, including business continuity planning resources developed by The City (CEMA) and additional resources through the Business and Local Economy program. Green Line will continue to explore partnership opportunities with these and other private programs or organizations, to seek out possible opportunities for efficient delivery of these types of support initiatives for stakeholders.

Procurement: In keeping with our current business practices in support of Green Line's early works utility relocation projects, we would anticipate a similar approach will be taken to incorporating traffic management, construction mitigation, business continuity planning and communications requirements as part of Green Line's procurement strategy to reduce or minimize construction impacts will also be taken.

In addition, and aligned with the City's social procurement objectives, the establishment of a Community Benefits Plan is a requirement for Green Line as part of our federal partnership funding for the project and will be implemented through project procurement. The framework for the Community Employment Benefits Plan sets out objectives for the sourcing of goods from local businesses.

Workforce Training: Transit agency/government implemented workforce training programs are more common in larger metropolitan areas than Calgary, where the transit agency often oversees numerous large scale transportation projects across a region on an ongoing-basis (e.g. Metrolinx in Toronto-Hamilton). In these circumstances, the considerable investment to establish and administer these types of permanent programs is warranted, as efficiencies are realized as programs are replicated and applied in support of multiple projects. These permanent programs are often supported by staff within these agencies in positions akin to Green Line Stakeholder Relations and Business Support program staff. Alternatively, in other projects without established permanent programs, apprenticeship programs are implemented via formalization in the construction contracts and delegated to the contractor.

The framework for the Community Employment Benefits Plan also sets out training and employment objectives for targeted groups and businesses via an Apprenticeship Program and a Diversity & Inclusion Plan. The Apprenticeship Program Plan is intended to provide construction apprenticeship opportunities for each trade required on the project and includes a focused program for women and local Indigenous peoples. As Green Line's redefined procurement strategy advances, it is anticipated that this current procurement framework and objectives for realization of the Community Employment Benefits Plan will remain, with the potential for refinement or update if warranted.

Financial Support: Of all the business support initiatives reviewed, financial support initiatives proved the most challenging to evaluate for utility. Across examples, there was inconsistency between what

program elements are reported and little consensus as to what aspects and outcomes constitute a successful program. In spite of these inconsistencies, there are some commonalities that were found which have helped to inform whether applicability of financial support initiatives to the Green Line project is warranted.

Financial support programs were found to be challenging to implement and complex in terms of their funding sources, implementation, administration and program evaluation. Partnerships between the transit agency and/or municipal governments with local banks, non-profit organizations, and foundations are usually necessary. The budgets associated with these programs were often significant (e.g. \$4mil (USD) St. Paul, \$50mil (USD) Seattle, \$10mil (USD) annually Los Angeles – Crenshaw/LAX metro) and the organizational and administrative costs associated with these programs are also assumed to be high.

These programs are usually targeted toward smaller sized, independent retail and service sector type businesses. However, due to a range of factors (external and internal such as program design and delivery), there was no guarantees of business stakeholder participation. Business participant satisfaction with the programs was also varied. Insufficient loan amounts to provide adequate support and low program uptake, often due to various unintended barriers to entry due to program design were commonly cited. Therefore, when we assess the learnings from these other projects and consider a number of factors with regard to applicability to Green Line, financial support initiatives are not believed to be a practical or cost-effective form of business support to pursue at this time. Particularly when there are other types of initiatives that may also offer support to impacted businesses that are also likely less expensive and complex to implement as a means of support.

Conclusion

Based on this review, we are confident that business support initiatives related to Access and Construction Management, Marketing and Promotions, and Business Capacity Building have broad applicability for the Green Line LRT project. There are opportunities to support small and medium local businesses through procurement and workforce training initiatives that have been identified as part of the Community Employment Benefits requirements in the funding agreement for the project. These will continue to be considered and advocated for during the development of the redefined procurement strategy. Initiatives related to Financial Support are more complex to develop and implement, and can have broader impacts for The City beyond a single project. At this point, the team will focus on five of the six initiatives as those which are considered most applicable support initiatives for Green Line business stakeholders.

As we continue to build the program and as more detailed construction information becomes available, we will use this information together with our understanding of the project and our knowledge of various business support programs to ensure that we are working to implement initiatives that will provide the greatest benefit and value to those stakeholders most impacted by Green Line LRT construction.

APPENDIX A

Business Support Program Initiative Case Studies

Initiative: Access and Construction Management

Project: The Broadway Subway Project

Summary: A current Skytrain expansion project in Vancouver. The Broadway Subway Project is a 5.7 km extension of the Millennium Line, from VCC-Clark Station to Broadway and Arbutus. The project will have 6 new underground stations.



Initiative Description: Access and construction management are playing a central role in the Broadway Subway Project. Ensuring that walking and wheeling (e.g. pedestrians, bikes, scooters, etc.) access to all buildings along the construction alignment, including to businesses is a program priority initiative and project requirement. Maintaining vehicular access to sites is also a priority.

- Specific construction methodologies have been selected in consideration of their access impacts on adjacent stakeholders. Tunnel boring for the underground portions of the alignment have been selected over cut and cover excavation.
- To maintain vehicular access and pedestrian access to adjacent businesses at underground station locations where cut and cover excavation is necessary, temporary bridging over the underground excavation areas are being installed to maintain traffic and pedestrian access and flow.
- Replacement parking strategies are in place to provide alternate locations for public parking when existing on-street parking stalls will need to be removed/closed to make way for construction.
- The project team is engaging with local businesses to project maintain visibility and access, mitigate construction impacts where possible, and providing timely information about traffic, parking and access.
- The project contractor is working with businesses and project partners, the City of Vancouver and TransLink, on a thorough wayfinding plan that includes parking and access mapping.
- To date, close to 2,000 surveys of businesses along the corridor have been completed. Feedback is being used to inform traffic and construction management and mitigation plans.

Initiative: Business Capacity Building

Project: Metro's Crenshaw/LAX Transit Project

Summary: This project began construction in 2014 and extends light rail transit service from the existing Metro E Line at Crenshaw and Exposition Boulevards in Los Angeles merging with the Metro C Line at the Aviation/LAX Station in the City of El Segundo. The line is 14 kilometers long with 8 stations and will serve the cities of Los Angeles, Inglewood and El Segundo when it is completed this year.

Initiative Description: In recognition of the importance of the importance that small businesses have on Los Angeles' economy and a well-supported public transportation system. Metro developed a pilot Business Solution Center (BSC) that provides hands-on business assistance and support services to small businesses along the Crenshaw/LAX corridor during construction. In addition to the BSC, a pilot Business Interruption Fund (BIF) has also been developed which is a financial support program for businesses impacted by construction. By 2019 the BIF was extended to other Metro transportation projects in the region and had assisted over 340 local businesses providing over \$20mil (USD) in funds.



- Small businesses can access the BSC for business and technical assistance including business development services and referrals to partnering business resource providers.
- Offered services are focused on, but not limited to:
 - hands-on business development and advice
 - coaching and technical assistance including referrals to expert professionals in the areas of accounting management and access to financial capital; branding, marketing, and social media.
 - Connecting businesses to specialized business services areas (i.e. cosmetology and restaurateurs); and information technology (i.e. website design and IT assessments).
- As of reporting from 2019, over 300 businesses accessed hands on training and over 1000 referrals were provided.
- Over 700 outreach activities to connect with businesses in support of these programs have taken place.
- 76% of business that connected with the BSC program remained in business 6 months after initial contact with the program.
- 20 business established websites for the first time to support their businesses.

Initiative: Marketing and Promotion

Project: MAX Yellow line: Portland Oregon

Summary: An LRT project in completed in 2004 with an alignment that begins in the downtown core and runs 9.3 km along Interstate Avenue, a key arterial road with a significant amount of small businesses.



Initiative Description: Overall this project has been lauded as exemplary for the ways in which businesses/stakeholders were supported during construction. A number of support initiatives were employed, including financial support, business capacity building, stringent contractor construction requirements and marketing and promotional campaigns.

Specific marketing and promotion campaigns included:

- Providing signage targeted at both pedestrians and vehicles, featuring the names of businesses, opening hours, parking, as well as entrance and detour directions.
- Development of The MAX Business Support program to attract more businesses to the corridor. Marketing strategies employed by the transportation industry TriMet the on behalf of the businesses included:
 - funding public advertisements on posters and buses
 - mail-outs of advertisements and coupons,
 - on-site promotions, sponsorship of special media and social events along the corridor
 - featuring stories about businesses and their owners in local papers
 - distributing flyers to assist with customer wayfinding
- Many of the businesses along the corridor took advantage of assistance offered by TriMet in developing new logos for the businesses in order to make their advertisements more eye-catching and effective.
- In recognition that it was challenging for customers to access restaurants along the alignment where construction was taking place, TriMet also implemented a highly successful Lunch Bus program that picked up customers in a central location downtown and ferried customers around to these businesses for lunch.

Initiative: Procurement

Project: Metro Tunnel

Summary: A metropolitan rail infrastructure project that is under construction in Melbourne, Australia. It includes the construction of twin 9-kilometre rail tunnels and five new underground stations through central Melbourne to connect two existing suburban lines and improve efficiencies for the city's existing central rail network hub.

Initiative Description: Through project procurement, a range of detailed initiatives have been incorporated for the project contractor as project requirements to safeguard measures on the Metro Tunnel Project for the benefit of the community and businesses in the form of Environmental Performance Requirements (EPRs). EPRs define the outcomes that must be achieved during the design, construction and operation of the project



An acoustical shed constructed over an underground station area to minimize noise and dust impacts on adjacent businesses/residences.

- Specific EPRs have been developed to ensure that the appointed contractors reduce and manage impacts and pro-actively engage with businesses.
- Business continuity plans outlining how contractors will manage impacts and provide support are required. These plans detail how the following measures will be undertaken:
 - Timely and regular communications with businesses including works notifications.
 - Maintaining access to businesses for customers, vehicles and deliveries.
 - Managing noise, dust, vibration and overall business amenity.
- Business Support Guidelines are also component of the procurement requirements for the project contractor. The project has implemented measures to support businesses in the various precincts by:
 - Promoting individual businesses and precincts through various communications channel.
 - Developing activation opportunities such as tailored events, leveraging existing events and pop-ups.
 - Developing partnerships with key stakeholders and organizations such as local councils, tourism organizations and business precinct associations.
 - Offering upskilling opportunities for businesses including engagement of specialists and one-on-one advice to businesses.
 - Developing Business Plans to assist businesses and the contractor to further understand how to best support businesses during construction.

Initiative: Workforce Training

Project: Eglinton Crosstown LRT

Summary: An under construction LRT project between east and west Toronto overseen by Metrolinx. A 19km alignment with 10km underground and 25 stations and stops.



Initiative Description: The Metrolinx Community Benefits (MCB) program was developed in support of this project in recognition that major infrastructure investments should also provide benefits for the communities where it is built.

- The MCB program framework targets: employment, apprenticeship, and local supplier opportunities.
- Program is oriented to provide a range of employment, training, and apprenticeship opportunities for historically disadvantaged communities and equity seeking groups.
- Information about employment, training, apprenticeship, and procurement opportunities are made readily available to residents, businesses and social enterprises.
- MCB program is applied across Metrolinx's other Toronto LRT projects (e.g. Finch West, etc.)
- Program is implemented by Project Co. as part of the project agreement, compliance is monitored by Metrolinx.
- Partnership with Government Ministry of Training, Colleges and University, and Community Partner organization established to support and provide inputs the program.
- Program initiatives in place to also encourage Project Co procurement of goods and services from Toronto based social enterprises.
- Metrolinx role to ensure that the community benefits commitments made by Project Co in the agreement maximize employment, training and apprenticeship opportunities and monitors and enforces provisions respecting the plan.
- Metrolinx employs a dedicated liaison to support the program and partners and also informs the program about any job opportunities at Metrolinx
- MCB plan includes communications measures to enhance awareness in communities about jobs and apprenticeships, Project Co team provides staff to support skills development workshops (professional and trade skills) and are guest speakers at high school 'Transit in your community' engagement programs.

Initiative: Financial Support

Program: Montreal – Financial assistance to institutions located in an area affected by major public works construction

Summary: In 2019 with provincial funding support, the City of Montréal launched a financial assistance program for certain types of small scale businesses (retail, restaurants, personal service, etc.) affected by construction impacts associated with major public works projects.

Initiative Description:

- This program is intended for construction work on sewer and water mains and transportation projects, such as subway expansions by the Société de Transport Montréal. It is a retroactive program back to projects in 2016/17
 - This program does not apply to the REV LRT project in Montreal which is under construction, but commenced prior to this program. It will be applicable for other Société de Transport Transit projects such as subway expansions where impacts on businesses are experienced
 - Financial assistance of up to \$40,000 per fiscal year is calculated based on a merchants' actual loss.
 - The loss of gross profit of businesses is calculated by comparing the gross profit recorded during any financial year during the construction site with that made during comparable financial years before the construction site. The first 5% of the gross profit loss recorded for a financial year is not covered by the grant program.
 - The construction impacts must be for a minimum planned or actual duration of at least six months.
- Construction impacts access to challenges to the business – e.g. vehicular traffic access, etc.



APPENDIX B

Business Support Program Project Case Study

Project Case Study:

MAX Yellow Line, Portland

Summary: An LRT extension project in completed in 2004 with an alignment that begins in the downtown core and runs 9.3 km along Interstate Avenue, a key arterial road with a significant amount of small businesses.



Initiatives: Overall this project has been lauded as exemplary for the ways in which businesses/stakeholders were supported during construction. A number of support initiatives were employed, including **financial support, business capacity building, stringent contractor construction requirements and marketing and promotional campaigns.**

Project	Details	Business Support Initiatives						Overall Program Success Rating
		Access + Construction Management	Business Capacity Building	Marketing + Promotion	Procurement	Workforce Training	Financial Support	
MAX Yellow Line	City: Portland Type: LRT Length: 9.3 km Agency: TriMet	✓	✓	✓	✓		✓	High Success

Highlights and Key Take Away

1. Comprehensive planning, clear communication with stakeholder businesses and communities, extensive documentation and timely reviews of lessons learned were attributes of this program.

2. The City of Portland identified the strength of the working relationships between the construction contractor, TriMet (Transit Agency) staff, and the community as a key factor responsible for the success of the program.
3. Businesses and residents identified by that the 'hands-on' approach applied by TriMet was a key component of the success of the community
4. Community Outreach – Stakeholder Relations a key contributor for project success:
 - Conventional outreach - websites (with Spanish information section), door-to-door canvassing, telephone campaigns, mailings, and advertising in local papers and newsletters ensured that a broad stakeholder base was reached.
 - For more in-depth discussions, TriMet provided the public with opportunities to attend project-specific meetings, and four designated community relations staff were dedicated to the project.
 - The community relations staff were available to the public 24/7 and were representative of the community, with each staff member either living in or having connections to the area.
 - The construction supervisors met one-on-one with affected businesses, and designated phone operators were available to answer questions, address complaints or deal with construction-related emergencies

Initiative Details

Access and Construction Management

- Required staging of construction in “reaches”, (i.e. sections approximately four city blocks in length) that would need to be fully completed in approximately eight weeks before beginning work on the next section. If there were any time gaps in construction phasing, all streets and sidewalks were required to be restored in the interim.
- TriMet was adamant about providing pedestrian access to businesses, thus business entrances had to be accessible to pedestrians at all times, and storefront construction could only be done before or after business hours.
- Construction activities were prohibited on public holidays, allowing businesses to maximize their seasonal income (Richardson, 2014).
- Supporting business signage and wayfinding plan established in support. Signage identified business names and hours of operation.

Business Capacity Building

- MAX Business Support Program was implemented by TriMet.
 - Facilitated technical workshops to support businesses.
 - Assistance offered to businesses to help them develop new logos in order to make their advertisements more eye-catching and effective.

Marketing and Promotions

For Businesses TriMet funded:

- Public advertisements on posters and buses
- Mail-outs of advertisements and coupons
- On-site promotions
- Sponsorship of special media and social events along the corridor
- Featuring stories about businesses and their owners in local papers
- Distributing flyers to assist with customer wayfinding.
- TriMet also implemented a *Lunch Bus* program that ferried customers around to the businesses along the alignment.

Procurement

See Access and Construction Management initiatives above that would have been implemented by procurement agreement.

Financial Support

Financial assistance offered in the form of business loans and storefront façade improvement funds.

Loans

In partnership with banks and City of Portland loans of up to \$25K granted with low 3% interest rates to mitigate revenue losses for 6-12 months while construction occurred in front of business.

Loan eligibility based on annual revenue, proximity to construction, construction period, documented losses, types of service provided by business,

Grants

Storefront façade improvement grants to assist business owners to renovate and improve their storefronts, and to make them more appealing to customers.

APPENDIX C

Major Public Transit Infrastructure Project Scan

Table 1 – Inventory of Business Support Initiatives

Project	Details	Business Support Initiatives						Overall Program Success Rating
		Access + Construction Management	Business Capacity Building	Marketing + Promotion	Procurement	Workforce Training	Financial Support	
MAX Yellow Line	City: Portland Type: LRT Length: 9.3 km	✓	✓	✓	✓		✓	High Success
Central Link	City: Seattle Type: LRT Length: 25.3 km	✓	✓	✓		✓	✓	Moderate Success
Central Corridor Light Rail Project	City: St. Paul/Minneapolis Type: LRT Length: 18 km	✓	✓	✓	✓		✓	Moderate Success
Phoenix Valley Metro Light Rail	City: Phoenix, Tempe, Mesa Type: LRT Length: 32.2 km	✓	✓	✓	✓		✓	Moderate Success
Canada Line	City: Vancouver Type: LRT (Skytrain) Length: 19.2 km			✓	✓			Moderate Success
Broadway Subway Project	City: Vancouver Type: LRT (Skytrain) Length: 5.7 km	✓	✓	✓	✓	✓		In Progress
Surrey Langley Skytrain	City: Surrey Type: LRT (Skytrain) Length: 16 km							(Project Planning/ Funding Phase)
West LRT	City: Calgary Type: LRT Length: 8.2 km				✓			Moderate Success
MAX Purple (17 AV SE)	City: Calgary Type: BRT				✓			Moderate Success

Project	Details	Business Support Initiatives						Overall Program Success Rating
		Access + Construction Management	Business Capacity Building	Marketing + Promotion	Procurement	Workforce Training	Financial Support	
MAX Teal	City: Calgary Type: BRT				✓			Moderate Success
MAX Orange	City: Calgary Type: BRT Length: 20 km				✓			Moderate Success
MAX Yellow	City: Calgary Type: BRT				✓			Moderate Success
Valley Line Southeast	City: Edmonton Type: LRT Length: 13.5 km	✓			✓	✓		In Progress
Valley Line West	City: Edmonton Type: LRT Length: 13 km	✓		✓	✓	✓		In Progress
Saskatoon BRT	City: Saskatoon Type: BRT Length: 38 km				✓			In Progress
Southwest Transitway (stage 2)	City: Winnipeg Type: BRT Length: 7.6 km	✓			✓			Moderate Success
Kitchener Waterloo ION Light	City: Kitchener-Waterloo Type: LRT Length: 14.5 km	✓	✓		✓	✓		High Success
Hurontario LRT	City: Mississauga - Brampton Type: LRT Length: 18 km	✓	✓	✓	✓	✓		In Progress
Eglinton Crosstown	City: Toronto Type: LRT Length: 19 km	✓	✓	✓	✓	✓		In Progress
Finch West LRT	City: Toronto Type: LRT Length: 11 km	✓	✓	✓	✓	✓		In Progress

Project	Details	Business Support Initiatives						Overall Program Success Rating
		Access + Construction Management	Business Capacity Building	Marketing + Promotion	Procurement	Workforce Training	Financial Support	
Confederation Line	City: Ottawa Type: LRT Length: 12.5 km	✓		✓	✓			In Progress
Réseau Express Métropolitain	City: Montreal Type: LRT Length: 67 km	✓		✓	✓			In Progress
Blue Line Subway Extension - STM	City: Montreal Type: Subway Length: 5.8 km	✓			✓	✓	✓	In Progress

Table 2 – Summary of Key Take Away

Project	Agency	Key Take Away
Max Yellow Line		<ul style="list-style-type: none"> • Business loans and grants for storefront improvements • Lenient eligibility criteria for loans • Detailed inventory/record keeping of stakeholder businesses • Construction phasing required as a means to maintain access to businesses • Successful marketing and promotional campaigns including the “Lunch Bus” program • Well organized, highly resourced community relations support team with vested interests in community and ‘hands-on’ approach
Central Link		<ul style="list-style-type: none"> • Many businesses that received financial support still closed or relocated elsewhere • A forgivable loan program for business to re-establish on the corridor was offered, but this did not guarantee the return of customers to the area and businesses still suffered • Relatively low business participation in business support program initiatives—likely attributable to the program’s lack of accessibility (e.g. linguistic and cultural barriers) to a wider range of stakeholder businesses
Central Corridor Light Rail Project		<ul style="list-style-type: none"> • Range of initiatives with varied success • Loan program was onerous for businesses to apply for, size of the loans not adequate amount to support • Program language barriers • not adequate funding to support certain initiatives throughout construction • contractor incentive program preformed moderately, businesses felt that the contractor still lacked compassion • well organized and appointed stakeholder communications and engagement supports instituted

Phoenix Valley Metro Light Rail		<ul style="list-style-type: none"> • Small business loan qualification too strict, limiting uptake • Contractor incentive program – majority of funding for contractor incentives was awarded, but it proved difficult to evaluate contractor performance by panels. In many cases where awards were granted, businesses were still unsatisfied with performance • Communications and outreach support for stakeholders organized by geographic zones along the alignment, and designated staff were established as a single (and direct) point of contact for stakeholders during construction
Canada Line	Translink ProTrans BC (operator)	<ul style="list-style-type: none"> • Marketing Campaign (in response to business concerns re: construction methodology change from tunnel boring to cut-and-cover along majority of the alignment along Cambie Street • Marketing campaigns in support of businesses along the alignment “e.g. businesses are open along the Canada Line” • Campaigns were reactive and as a result may have had less success
Broadway Subway Project	Broadway Subway P.Co Translink (operator)	<ul style="list-style-type: none"> • A comprehensive communications and community and business relations program will be in place to: <ul style="list-style-type: none"> - Provide timely information about the Project, including construction, traffic and parking information. - Work with local businesses and residents to mitigate construction impacts where possible, and help manage issues as they arise. - Work with the community to promote alternative travel choices during construction. - Work with local businesses to maintain visibility and help customers access their shops and services • Construction Access Management for Businesses • Parking and loading zone management plan - City and Province are committed to ensuring adequate parking supply for businesses and residents through wayfinding towards off-street parking opportunities as well as reconsidering on-street parking regulations on nearby streets. • Street Use Merchandise and patios – assistance • Business Visibility – signage Assistance • Walking and Rolling (Sidewalk) Access to be maintained • Transit detouring • Motor vehicle detouring assistance • Tunnel Boring methodology selected due to lessons learned re: impacted businesses from Canada Line construction • Bridging over station boxes to maintain access • Program partnership between Province and City of Vancouver
Surrey Langley Skytrain	Translink	<ul style="list-style-type: none"> • This project is still seeking funding, no formal programs have been developed.

West LRT	Calgary Transit	<ul style="list-style-type: none"> • No formal program
MAX Purple (17 AV SE)	Calgary Transit	<ul style="list-style-type: none"> • No formal program
MAX Teal	Calgary Transit	<ul style="list-style-type: none"> • No formal program • City of Calgary public engagement to inform construction phasing • Input collected during the final phase were considered as construction plans developed and before pedestrian bridges, connections to and from stations and landscaping were finalized.
MAX Orange	Calgary Transit	<ul style="list-style-type: none"> • No formal program
MAX Yellow	Calgary Transit	<ul style="list-style-type: none"> • No formal program • City of Calgary public engagement to inform construction phasing • Input collected during the final phase were considered as construction plans were developed and before pedestrian bridges, connections to and from stations and landscaping were finalized.
Valley Line Southeast	TransEd Partners and City of Edmonton	<ul style="list-style-type: none"> • No formal program • The Project Agreement required the following public commitments: • Provide notices about construction before and during to businesses, landowners and tenants • Access planning with industrial businesses • Commitments to minimize construction noise and vibrations • Coordination and communication with festivals and events to minimize construction impacts
Valley Line West	Marigold Infrastructure Partners and City of Edmonton	<ul style="list-style-type: none"> • Partnership Support: City has established 5 citizen working groups along the alignment to provide input and feedback at all project stages including construction • City is also committing to continue working with businesses to address access impacts and other potential impact mitigations
Saskatoon BRT	Saskatoon Transit	<ul style="list-style-type: none"> • No formal program
Southwest Transitway (stage 2)	Winnipeg Transit	<ul style="list-style-type: none"> • No formal program. • Construction and Access Management and Communications with stakeholders on a regular basis as part of the Project Agreement (procurement) • Partnership support in collaboration with the City of Winnipeg
Kitchener Waterloo ION Light	ION for Grand River Transit	<ul style="list-style-type: none"> • No formal program • Community Engagement Strategy – incorporated as part of the Project Agreement • Communications before and during construction with businesses (public meetings, one-on-one and small groups)

		<ul style="list-style-type: none"> • Business outreach – direct contact with businesses (determining appropriate specific business contacts) • Informational materials and ongoing dialogue with key businesses and key business groups critical. In addition, business-related promotional efforts developed in conjunction with businesses and business-related groups to help overcome impacts during construction. • Tactics: Business Workshop Series: Preparing for Rapid Transit Construction • Construction Events: Midnight Madness, Movie Nights, Block Parties • Construction Update meetings • Music in the Zone: public art - musicians playing in the construction zone (day/night) • Area walks
Hurontario LRT	Metrolinx and Infrastructure Ontario (IO)	<ul style="list-style-type: none"> • Metrolinx Community Benefits Program • Metrolinx Community Benefits Program brings people from the community to the table right from the start, providing opportunities to local residents such as employment, training, apprenticeship and local supplier and social procurement opportunities. • Project promotion of: • City of Mississauga Small Business Supports • City of Brampton Business Supports • COVID-19 Help for Businesses in Ontario • Establishment of project LRT community offices in both cities
Eglinton Crosstown	Metrolinx	<ul style="list-style-type: none"> • Metrolinx Community Benefits Program • Metrolinx Community Benefits Program brings people from the community to the table right from the start, providing opportunities to local residents such as employment, training, apprenticeship and local supplier and social procurement opportunities • Partnerships with Province
Finch West LRT	Metrolinx	<ul style="list-style-type: none"> • Metrolinx Community Benefits Program • Metrolinx Community Benefits Program brings people from the community to the table right from the start, providing opportunities to local residents such as employment, training, apprenticeship and local supplier and social procurement opportunities • Partnerships with Province
Confederation Line	OC Transpo	<ul style="list-style-type: none"> • the Project Agreement outlined a series of obligations for how the winning proponent would support the City to communicate and engage with stakeholders including businesses in coordination with the City, provide regular updates to the immediately affected property owners and neighbourhoods on design and construction works related issues with particular attention to communicating

		<p>the scope, schedule and status of the Design and Construction Works and reasonable advance notice of the schedule, where possible. This includes processes to proactively address any design and construction works related inquiries and issues (e.g., public inquiries and complaints re noise, hours of work, dust, etc.)</p> <ul style="list-style-type: none"> • Stakeholder Relations support geographically assigned (Stage 1) • Now in construction and community liaison model (where stakeholder relations staff are assigned to a geographic element of the project) has been very successful. • Regular presentations and communications with all affected stakeholders are ongoing
Réseau Express Métropolitain	Société de transport de Montreal	<ul style="list-style-type: none"> • Businesses impacted by this project not eligible for Montreal Business Support Compensation program
Blue Line Subway Extension - STM	Société de transport de Montreal	<ul style="list-style-type: none"> • Businesses impacted by this project may be eligible for Montreal Business Support Compensation program (TBC)



Calgary



GLB2021-0975
Attach #3

Green Line Qualitative Research

Final Report on In-Depth Interview Findings

For more information, please contact:

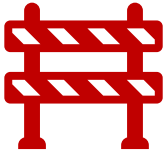
PROBE
RESEARCH INC.

Contact:
Curtis Brown
Principal
Probe Research

603 -191 Lombard Ave.
Winnipeg, MB R3B 0X1
(204) 894-3298
curtis@probe-research.com

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Research Summary



Traffic congestion and loss of parking were the biggest pain points for businesses experiencing construction.



Businesses were most likely to be frustrated by lane closures, reductions in parking and other measures that make their businesses harder to access.

Better signage and forums for sharing feedback were viewed as the most helpful things The City can offer.



10 of 15 Calgary-based businesses interviewed said an online discussion forum would be “very helpful” during construction.



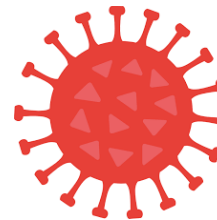
9 of 15 said making signage larger and more prominent near construction sites would be “very helpful.”

More than anything, business owners wanted clear, sustained and honest communication about how construction will affect their business.



Businesses wanted multiple touchpoints – particularly direct contact with engagement staff – and a clear deadline for when construction will end.

Support for businesses may be especially important in the wake of COVID-19.



Businesses noted that it may be devastating for those along the Green Line to have to deal with construction right as they emerge from the pandemic.

“There's no access, and then you've got COVID on top of it... That's just adding fuel to the fire.”

- Calgary business owner



Methodology

Introduction/Methodology

- The City of Calgary is about to embark on the construction of the Green Line Light Rail Transit (LRT), the largest infrastructure project in Calgary's history. This line will run through Calgary's commercial core as well as several areas with a relatively high number of businesses.
- The City wished to understand how it can better engage businesses located along the Green Line path and address any of their potential concerns, while also helping them deal with the negative impacts of construction. To this end, The City wished to better understand:
 - The experiences of business located within Calgary that have dealt with both transit and non-transit-related construction in recent years; and
 - The experiences of businesses located in other Canadian cities, including Toronto, Ottawa, Edmonton, Kitchener-Waterloo and Mississauga, where light-rail transit lines have been constructed recently.
- The City commissioned Probe Research to conduct a series of 30 in-depth interviews (IDIs), including 15 with representatives of Calgary-based businesses and 15 interviews with representatives of businesses in these other Canadian cities.
- The table later in this section provides an overview of where these businesses were located, as well as their other characteristics.

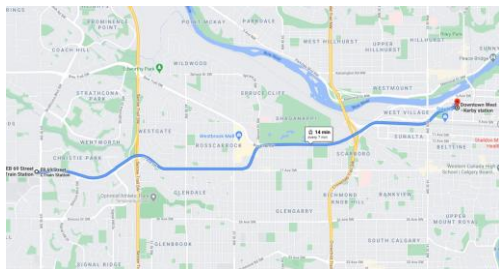


Introduction/Methodology

- To contact businesses, Probe Research developed a database using public listings taken from Google Maps in areas where these construction projects have occurred.
- A customized screening survey was administered via telephone prior to each interview, and all participants were provided with a \$150 incentive in exchange for their participation.
- A total of 30 interviews were completed between March 8th and March 27th, 2021 by Curtis Brown, Mary Agnes Welch and Katelin Neufeld of Probe Research. These conversations followed two customized discussion guides: one for Calgary businesses and one for businesses located in other cities.
- All interviews were audio-recorded with participant consent and transcriptions will be available once the final report has been submitted.

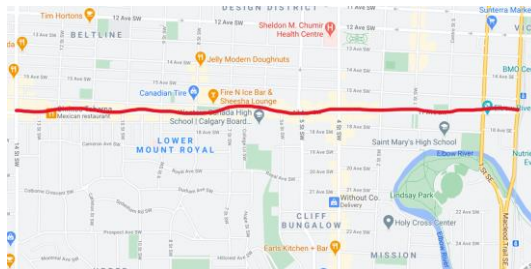


Profile of Respondents: Calgary



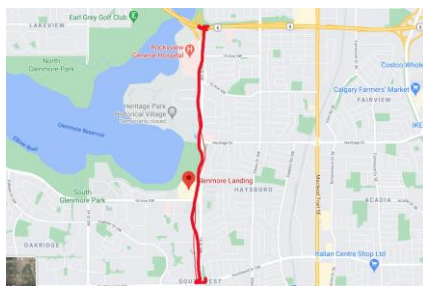
CTrain West LRT

Built 2009-2012; opened 2012
Number of interviews: 6



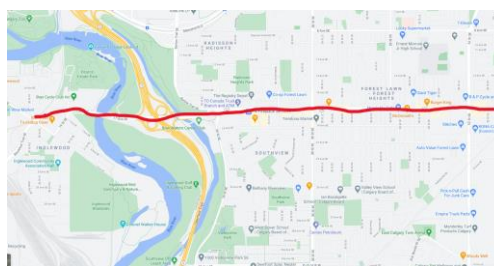
17th Avenue S.W. (non-transit)

Under construction 2017-2019
Number of interviews: 4



Glenmore Landing/ Southwest BRT

Built 2017-2019; open 2020
Number of interviews: 3



17th Avenue Transitway (BRT)

Built 2017-18, opened 2018
Number of interviews: 2

Company Size

10

<25 employees

2

25-49 employees

3

50+ employees

Sector Categories

8

Retail, hospitality,
accommodation, food
services

3

Professional/financial
services

2

Construction,
manufacturing, wholesale
trade and resources

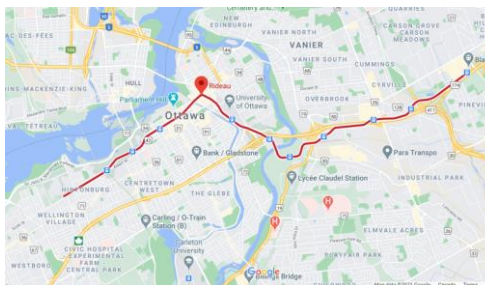
2

Other (various)

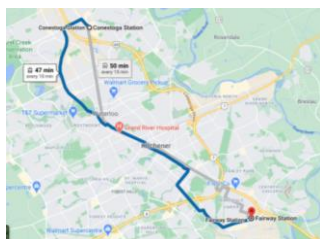
Profile of Respondents: Other Cities



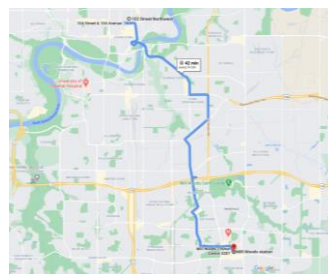
Toronto: Eglinton Crosstown LRT
Under construction; opening in 2022
Number of interviews: 4



Ottawa: Confederation Line
Built 2015-2018; opened in 2019
Number of interviews: 4



Kitchener-Waterloo: Ion Light Rail
Built 2014-2019;
opened in 2019
Number of interviews: 3



Edmonton: Valley Line Southeast LRT
Under construction; open
in 2021
Number of interviews: 3



Mississauga: Hurontario LRT
Under construction;
open in 2024
Number of interviews: 1

Company Size

10

<25 employees

2

25-49 employees

3

50+ employees

Sector Categories

3

Retail, hospitality,
accommodation, food
services

3

Professional/financial
services

7

Construction,
manufacturing, wholesale
trade and resources

2

Other (various)



Key Findings and Conclusions/ Recommendations

Assessment of Construction

The perceived impact of transit-related construction varied a great deal among businesses.

- Frustration with construction tended to boil down to three main factors: business sector, their proximity to construction and the ability to access alternate routes around the construction.
- Those in the retail and hospitality/service industry tended to note that construction had the most devastating impact on their business, while those in areas where there are limited access points (such as Glenmore Landing in Calgary) were more likely to say construction negatively affected their business.

Traffic congestion and lack of parking tended to be the main pain points for businesses.

- For most businesses, their chief frustration with construction was the inability of customers to access their business due to lane closures and turning restrictions.
- Those in more urbanized locations tended to point to both congestion and a lack of parking together as frustrations which kept customers away, while for those in suburban areas, frustration was more related to access points being blocked off.
- Other pain points that emerged were vibration/noise (which caused items to break within the business), dust/debris, and issues with flooding due to drainage changes.

Many businesses experienced a decrease in revenue during construction, with several not seeing a noticeable rebound due to the COVID-19 pandemic.

- The financial impact of construction varied significantly, with businesses dependent on walk-in traffic (e.g. retail, hospitality) more likely to report significant losses. While some businesses bounced back relatively quickly, some did not because the COVID-19 pandemic closely followed the end of construction.

Key Findings (cont'd)

Assessment of Construction (cont'd)

Businesses had mixed views on the long-term benefits of transit construction.

- Those in denser, more transit-oriented areas of Calgary and other cities were more likely to feel the short-term frustration of construction was outweighed by the long-term benefit of having a transit line near their business, with the associated increases in pedestrian traffic, property values, etc.
- Those in more suburban areas, on the other hand, questioned whether there will be much of a long-term benefit to them or to the area, as they observed relatively few people using these new transit services.

Communications Evaluation/Assessment

Businesses that interacted with someone directly tended to have a better assessment of the municipality's overall communications approach to construction.

- Calgary businesses who dealt with a more recent construction project (such as 17th Ave. S.W., 17th Ave. S.E. or Glenmore Landing) were more likely to report they had direct contact with someone from The City, and more likely to provide a positive assessment of The City's engagement with businesses prior to and during construction.
- Those who were affected by construction on the CTrain's West LRT line were less likely to recall dealing with someone directly – and less likely to be happy with The City's approach to communication.
- This was also the trend in other cities, as businesses in Toronto were more likely to feel their civic government and the agency responsible for constructing the Eglinton LRT (Metrolinx) was not accessible enough during construction.

Key Findings (cont'd)

Communications Evaluation/Assessment (cont'd)

The biggest communications-related frustration among businesses was a lack of clarity about how long construction will last.

- Businesses valued clear, honest updates about how long construction will last and grew frustrated when they were told about a series of extensive delays in finishing.
- Some businesses reported a gap in communication as their landlords may not have shared information sent by the municipality.
- Those who lease their buildings were more likely to say they did not always find out about construction in a timely manner because the municipality communicated with their landlord, who did not always pass along the information (or only shared some of it). While most felt they had enough time to prepare, many felt this is a problem that should be addressed.

Calgary-based businesses who raised concerns tended to be happy with how The City addressed them.

- Those who raised an issue with The City were generally likely to feel their concerns were heard and considered.
- Those in other cities were more likely to express frustration with their local government's response to concerns, as some said planning officials were more focused on dealing with the next area under construction than addressing concerns about construction in the moment.

Key Findings (cont'd)

Communications Evaluation/Assessment (cont'd)

The biggest communications-related frustration among businesses was a lack of clarity about how long construction will last.

- Businesses valued clear, honest updates about how long construction will last and grew frustrated when they were told about a series of extensive delays in finishing.
- Some businesses reported a gap in communication as their landlords may not have shared information sent by the municipality.
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Calgary-based businesses who raised concerns tended to be happy with how The City addressed them.

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Key Findings (cont'd)

Views on Assistance for Businesses

Many businesses did not perceive their municipality as offering a great deal of help – although most did to some degree.

- In both Calgary and elsewhere, many businesses did not perceive the local government as doing a great deal to help them during construction. While temporary signage was the item they were most likely to recall, many said the signs posted were not that helpful.
- Many businesses who experienced something more devastating – such as items breaking due to vibration, or other construction-related damage – were generally pleased with the efforts of city government and/or the contractor to “make things right.”

Businesses in other cities were more likely to expect some kind of financial assistance from their government – and were disappointed not to receive it.

- Those who were based in cities where transit-related construction dragged on longer than expected were more likely to think their municipal government should have provided some degree of tax relief to account for their hardship. Those in Calgary, on the other hand, were less likely to advocate for outright tax relief, but to want The City to offer help through both financial means (e.g. waiving licensing fees) and non-financial methods (e.g. better signage, events).

Creating online discussion forums, providing better signage could help businesses affected by Green Line construction.

- Calgary-based businesses who experienced construction felt these two ideas would be the most beneficial, as the discussion forum would give businesses an ongoing way to share ideas and feedback while also receiving updates. Many felt signage should be improved by making it more prominent.
- There were mixed views on hosting special events, with some indicating this idea was tried on 17th Ave. S.W. and was not successful.

Key Findings (cont'd)

Advice for the Green Line

Direct communication about construction – including a clear estimate of how long it will take – was viewed as the most important thing The City can do for businesses affected by the Green Line.

- Businesses in Calgary and elsewhere urged The City to be as clear and transparent as possible about where and when construction will occur and provide a prominent channel for businesses to express any concerns or frustrations, as well as ask questions.
- Those who have been through the experience before expressed how important it is to have dedicated staff in place who are responsive and can provide useful information on a timely basis, particularly about key project milestones.

Many businesses also felt that it will be important for The City to do as much as possible to solve other construction-related aggravations facing businesses.

- Many of these suggestions were modest and included things like removing no-parking signs near businesses temporarily, fixing damaged curbs and pavement and ensuring sidewalks remain clear during construction.

Businesses stressed that the impact of COVID-19 makes it especially important to ensure there are supports in place for businesses affected by the Green Line construction.

- Although they did not immediately make the connection – and it may be less of an issue if the first leg of construction has been delayed until 2022 – many businesses felt it is important not to hit Calgary businesses with another devastating blow just as they are recovering from the pandemic.
- Many of those interviewed suggested alleviating the impact by making construction proceed incrementally or providing even more supports to businesses – including some form of financial relief.

Conclusions/Recommendations

Be as clear as possible about construction timelines and their impacts.

- It became very apparent during the interviews that one of the greatest sources of frustration for businesses that have experienced transit-related construction was the amount of time required to finish. Those in Toronto – where the Eglinton LRT has experienced major delays – were especially frustrated with their city government and Metrolinx for the extended period required to build this line.
- Although it may not be entirely possible to do this given the nature of construction, The City should ensure that it is very clear about how long it will take to build each phase of the Green Line and have an extensive plan in place to engage businesses, answer their questions and alleviate any concerns.



Small gestures can make a major difference.

- Businesses did not have a clear sense that their municipal governments truly provided help during construction. But what many of them noticed – and deeply appreciated – were situations where the municipality or the contractor did things that alleviated some of their frustration. For example, this included temporarily removing no-parking signs near some businesses while regular parking spots were not accessible, or re-paving a parking lot that had been damaged by heavy vehicles during construction. These relatively modest efforts appear to have been appreciated, as they kept businesses already annoyed with the main aspects of construction from spiraling into further frustration and anger.

Conclusions/Recommendations (cont'd)

Ensure there are multiple and sustained touchpoints with affected businesses.

- It became apparent from these interviews that businesses that had direct contact with municipal engagement staff tended to be more satisfied with their local government's efforts to keep them informed. The City appears to do this to a greater degree now for major construction projects (e.g. Glenmore Landing, 17th Ave. S.W.) than in the past, and it was clear that even if businesses were angry about the effects of construction, they were more likely to give The City credit for listening to their concerns when they had someone they could call or email who would be responsive and empathetic.
- Direct engagement through dedicated staff is likely ideal, but should also be supplemented by other touchpoints, including printed notices prior to construction, ongoing email updates and a dedicated discussion forum (discussed in more detail below). One of the key arguments for having dedicated staff reach out directly to businesses (rather than relying on sending notices to property owners) is that this ensures actual business owners are reached, as landlords may not provide information to their tenants in a timely or complete manner.

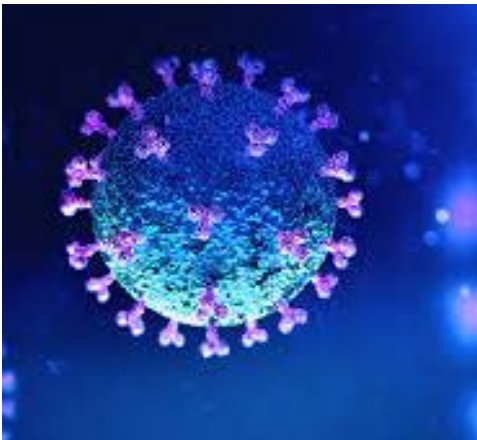
Ensure communications are simple, direct and in plain language.

- This is a fundamental component of communication, but some businesses reported that notices they received did not make it clear how extensive the construction would be or how exactly it would affect them. Any notices sent to businesses need to be written in accessible language and explain – briefly and at a very high level – what will happen, how the business will be affected and who they can contact if they have concerns.

Conclusions/Recommendations (cont'd)

Better signage and discussion forums were viewed as the most helpful potential types of assistance.

- When Calgary businesses were asked to consider ideas that could support businesses affected by the Green Line construction, they were most likely to point to having better signage to notify people that business are open. Many also felt that online discussion forums would be a useful place for businesses to learn more, vent and have their questions answered.
- The City may wish to prioritize these two items when preparing to support Green Line businesses. The idea of having a centralized business continuity hub – that is, a place where businesses could pick up and drop off courier items, leave waste and recycling, or that could serve as an alternative retail space – did not test well. The City may wish to set this idea aside when considering supports for businesses.



Carefully consider the impact and aftermath of COVID-19 on affected businesses.

- Although this may be less of an issue now that construction will not fully begin until 2022, business owners recognized that Green Line-related construction could be very detrimental, particularly to retailers and hospitality-related companies whose operations have been restricted to a great degree during the past year. The City's approach to communicating with and supporting these businesses should acknowledge this reality, as The City should also be prepared for additional concerns and complaints once some of the work (including relocating utility lines downtown, which is slated to happen in 2021) begins.



Assessment of Construction Disruption

This section looks at how business owners perceived the experience of construction, including the main pain points and the perceived short- and long-term impact of construction.

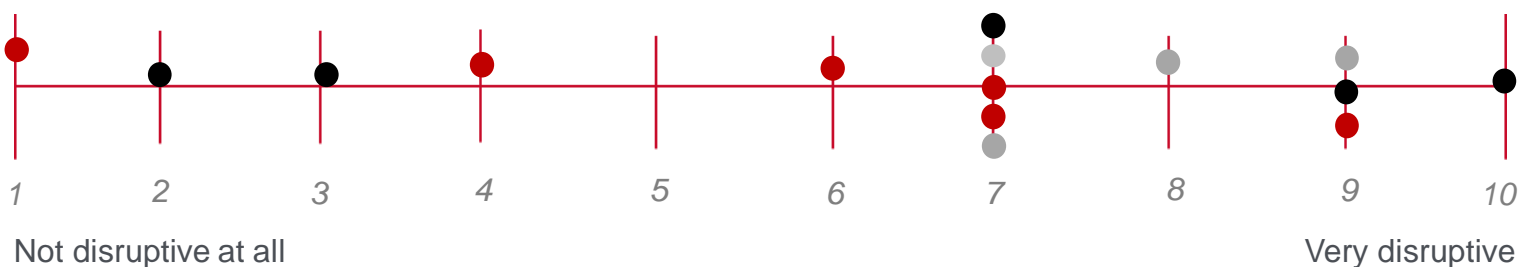
Overall Assessment of Construction

- When participants were asked to indicate how much of an effect construction had on the normal operations of their business, their views tended to vary based on three key factors: the type of industry they are in, their proximity to the construction and their ability to access other routes around the construction.
- Not surprisingly, those who were based in areas that experienced more prolonged periods of construction were more likely to say construction was more disruptive to their business. As well, those in areas where there were fewer potential access points (such as the Glenmore Landing area in Calgary) were also more likely to say it negatively affected their business.
- Retailers and those in the hospitality industry were most likely to say they experienced a significant amount of disruption due to construction, as they pointed to a noticeable drop in walk-in and drive-up traffic due to the disruption. In their view, customers began to avoid their area entirely because they knew it would be challenging to access parking, while some retailers and hospitality service business representatives pointed out that sidewalks were often blocked off by construction materials, which made it less appealing for customers to visit.
- Those in professional or white-collar occupations that are not reliant on walk-in traffic to a significant degree, meanwhile, were likely to say while construction was frustrating for them and their clients, they were not affected to the same degree. Many of these businesses dealt with these frustrations by going out to see clients rather than asking them to come in.
- Participants were asked to assess the impact of construction using a 1-10 scale where a 1 meant construction did not disrupt their business at all and a 10 meant it completely disrupted it. The results of this question can be found on the following two pages.

Assessment of Construction Impact Calgary-based Businesses

Perceived degree of disruption on the business

● West LRT ● 17th Ave. S.W. ● Glenmore Landing ● 17th Ave S.E.



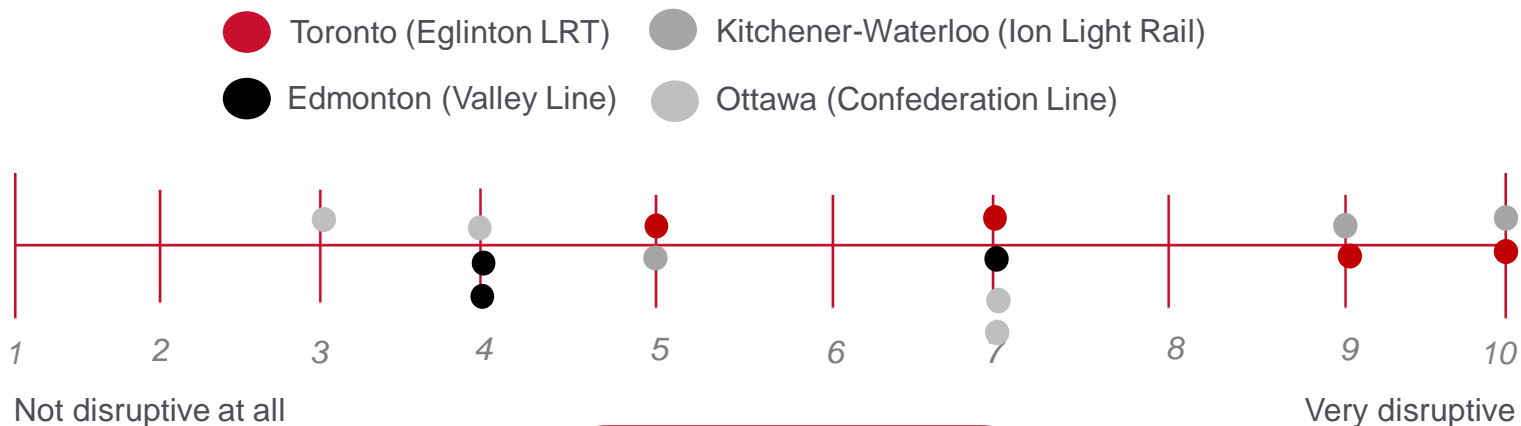
"It's affected my operation because it's hard to put signs when things are normal in the world to market my (business). It was difficult because people couldn't see the signs."
- Business along 17th Ave. S.E.

"Most of my customers, when they realized that everything was blocked, they decided not even to park. ... Most of them actually gave up completely. They didn't even show up."
- Business along 17th Ave. S.W.

"Probably nine out of ten. It was pretty severe. Sales dropped about 35 to 38 per cent that first year."
- Business at Glenmore Landing

Assessment of Construction Impact Businesses in Other Cities

Perceived degree of disruption on the business



"We can do a lot of our business through phone and email and courier services, so we don't rely on foot traffic necessarily ... I know other businesses that are on the same strip as us where a lot of the construction was going on. I think a lot of them were a little more impacted, that's for sure."

- Business in Ottawa

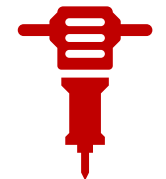
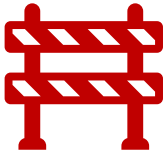
"The road that comes into my location literally was not accessible for over a year, so a majority of my customers actually had to take a service road ... that's filled with potholes and grunge to get into the back of our parking lot."

- Business in Kitchener-Waterloo

"It would be a 15, like well over 10 ... We don't have lots of traffic anymore because the roads and sidewalk are all torn up. There's no parking anywhere around."

- Business in Toronto

Construction Pain Points



- In both Calgary and elsewhere, businesses tended to point to two major pain points – **traffic congestion** getting to and from their businesses, coupled with the **loss of parking** due to construction.
 - Businesses located along grid roads in relatively urbanized areas were more likely to point to both the loss of parking alongside issues such as lane closures (and resultant congestion) and blocked access along the sidewalk for pedestrians.
 - Those based in more suburban locations with fewer access points (for example, the Glenmore Landing area in Calgary) were more likely to cite traffic congestion on its own as their chief frustration. The main impact of this cited by these business was customers avoiding coming to their locations.
 - In a few instances, business owners mentioned how contractors and other people associated with the project also took away parking on their properties.
- Some of the other specific frustrations cited by businesses included:
 - **Vibration/noise from construction.** This was often cited in instances where tunneling was required (such as along Toronto's Eglinton Avenue), but was also mentioned by a few other businesses that mentioned how machines working on the street made objects in their buildings vibrate.
 - One Calgary business owner along 17th Ave. S.W. described how vibrations led to fragile inventory breaking, while another business owner in the West LRT area described how vibration from driving piles into the ground broke some computer monitors.
 - One Toronto-based business owner attributed these vibrations to an influx of **rats** in their business due to the noise and vibration making these animals flee, and noted he had to invest in extermination measures.

Construction Pain Points (cont'd)



- One business owner in the West LRT area said their building **flooded** due to a change in drainage after construction took place, while a business owner in Kitchener-Waterloo mentioned how pressure from a **water main break** shot water onto his business' windows, forcing staff and clients to evacuate.
- Another business owner along the West LRT lined noted that someone climbed onto the overhead train line and threw a bag of metal weights through their roof, causing **significant damage**. Fortunately, it was late at night and no one was injured, and he was able to have the damaged fixed at no cost to their business.
- **Additional dust and debris** was mentioned specifically by a business owner who experienced this in the West LRT area of Calgary, although they may have inadvertently attributed this to a more recent construction project on Crowchild Trail than the West LRT construction project. Some businesses in other cities, however, did mention that they had to spend more money and time cleaning their storefront or dusting within their buildings due to dust and dirt stirred up by construction.



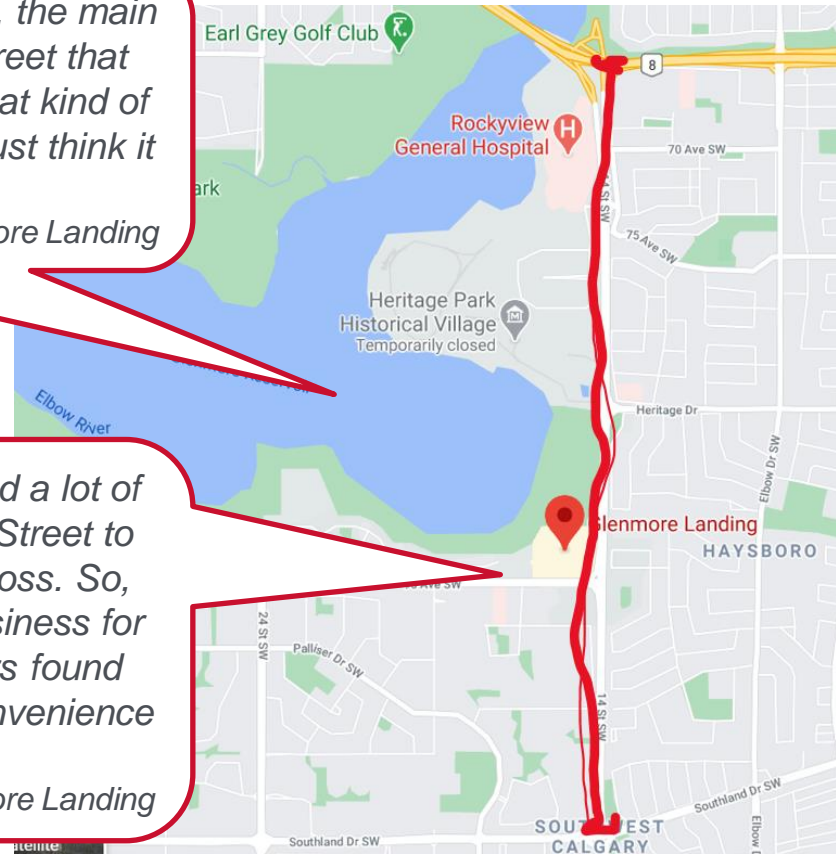
Construction Pain Points: Calgary Businesses

"The main entrance to the mall off 14th Street, the main street, was taken away. There is another street that intersects with 14th Street, 90th Avenue, so that kind of created a bottleneck at that entrance. And I just think it was too hectic for people."

- Business at Glenmore Landing

"We're on the west side of the 14th Street and a lot of customers came from the east side of 14th Street to our store. It was an absolute pain to get across. So, for probably two years, we lost all of that business for two and a half years where those customers found somewhere else to shop just due to the inconvenience of trying to get in here."

- Business at Glenmore Landing

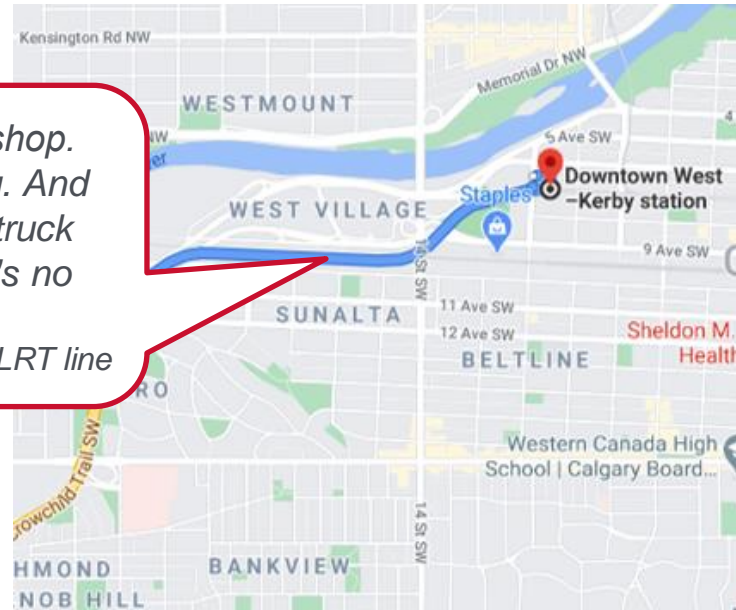


Construction Pain Points (cont'd)

Calgary Businesses

"To this day, it's kind of graded towards our shop. We've been phoning and phoning and asking. And finally, we just went out and got a couple of truck loads of gravel and filled it ourselves. There's no point asking anymore."

- Business along Calgary West LRT line



"Just with the construction, it was displacing other individuals where they normally park. You could tell parking was more congested than usual during that period of time."

- Business along 17th Ave. S.W.

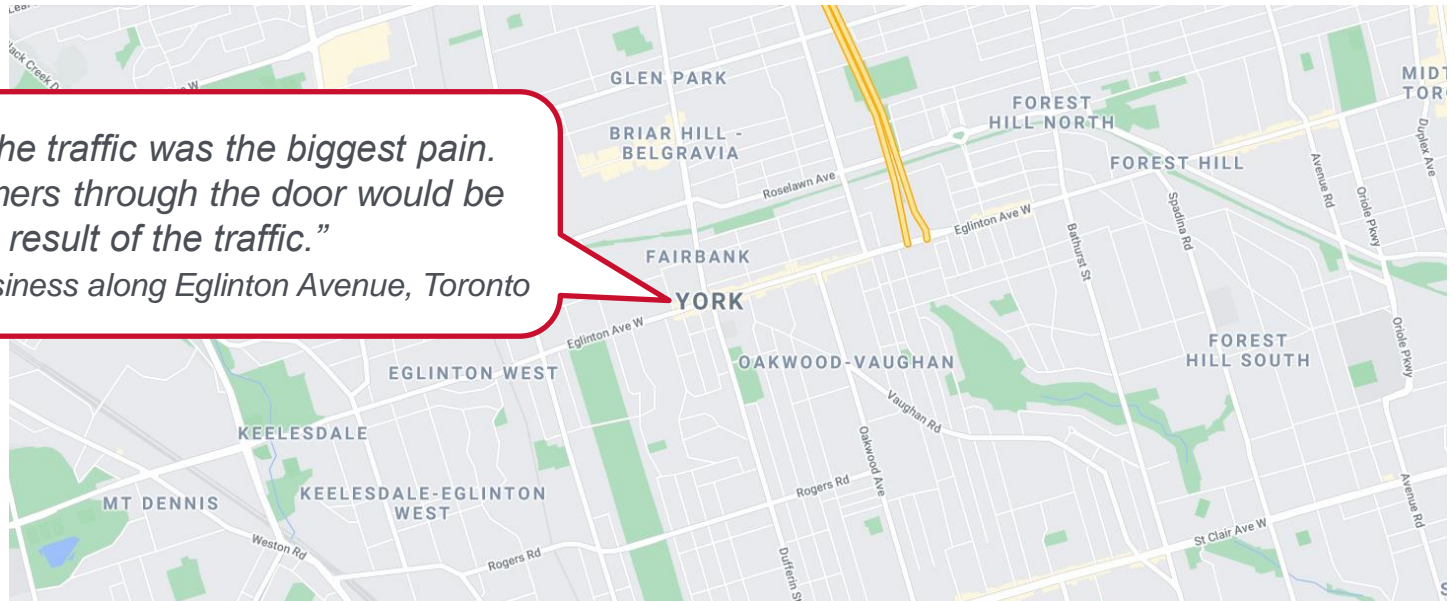


Construction Pain Points (cont'd)

Other cities

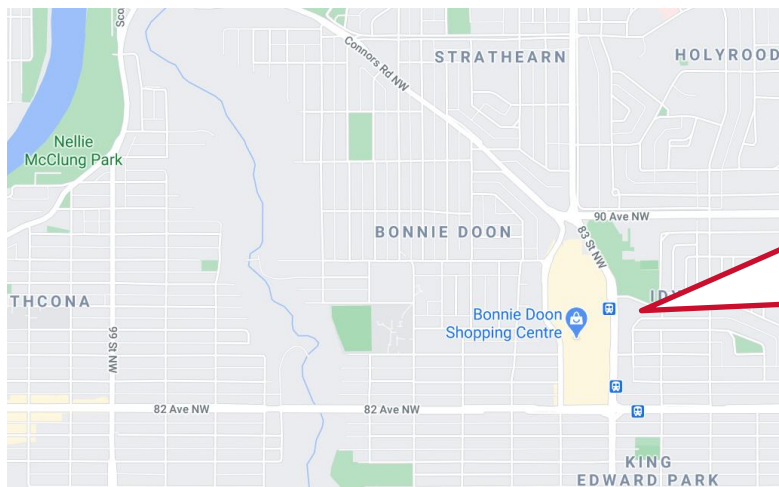
"I would say the traffic was the biggest pain. Losing customers through the door would be the result of the traffic."

- Business along Eglinton Avenue, Toronto



"We have service vehicles that leave here all hours of the night. With road closures and extra traffic going down 86th Street, it kind of slowed us up. We had to add extra time to our service calls."

- Business in southeast Edmonton

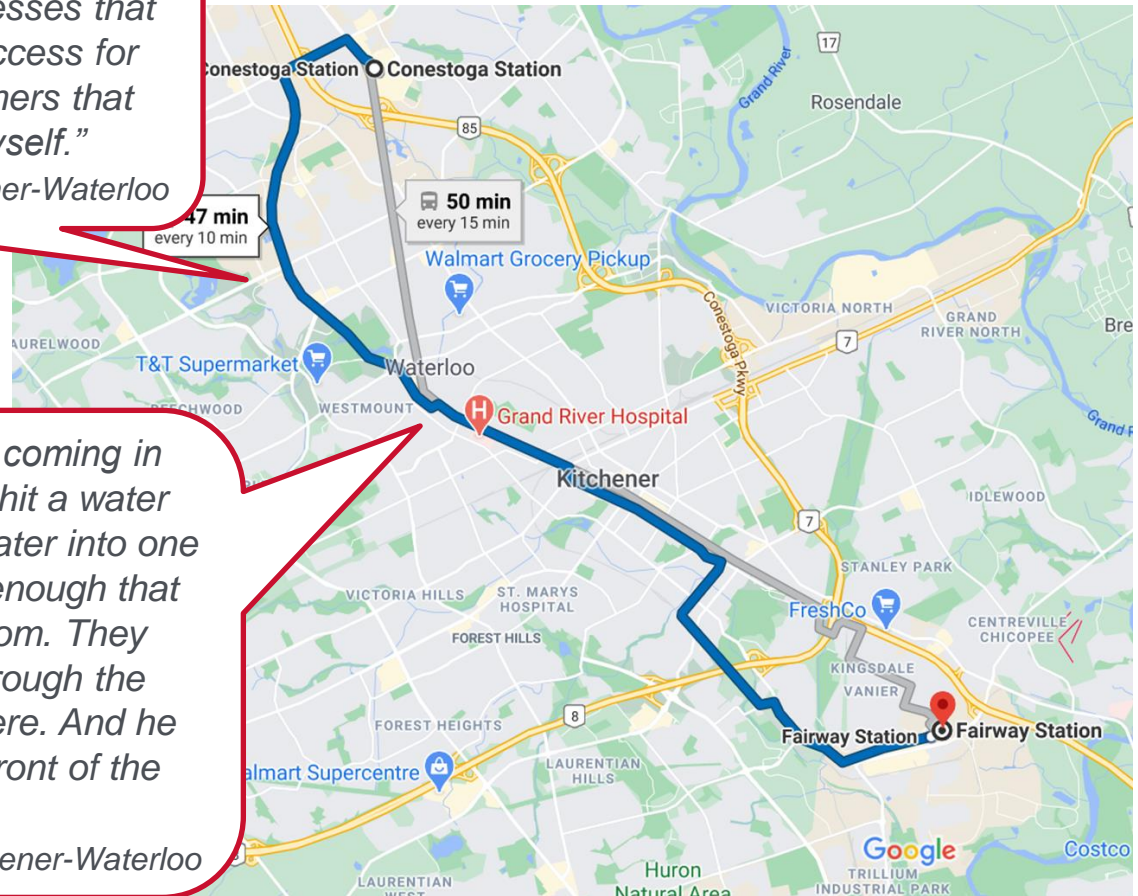


Construction Pain Points (cont'd)

Other cities

"I experienced traffic headaches and delays. But compared to some of the businesses that were right along the line and lost access for long periods of time, there were others that were far more impacted than myself."

- Business in Kitchener-Waterloo



"They cut our Rogers cable line coming in about four different times. They hit a water pipe. And it shot up a stream of water into one of our windows that was strong enough that people were evacuating the room. They thought it was going to bust through the window. They had a backhoe there. And he just put the backhoe bucket in front of the water stream."

- Business in Kitchener-Waterloo

Short and Long-Term Impact

- A majority of businesses interviewed indicated their companies experienced decreases in revenue during construction.
 - About one-half of the Calgary-based businesses reported decreases in revenue, which ranged from a low of 10 percent to 50 per cent reported by two businesses. In other cities, only about half reported losses, with those along Toronto's Eglinton Avenue reporting the highest and most sustained losses over time.
- In several instances, business owners had a difficult time measuring how quickly business bounced back following construction, since for some of the more-recently completed projects, the COVID-19 pandemic struck shortly after construction ended. Businesses in the retail and hospitality sector were most likely to state that their business has never fully recovered from the impact of both construction and COVID-19.
- There were mixed views regarding the perceived benefits of these projects. Those in growing and densifying areas, such as those along Eglinton Avenue in Toronto and in downtown parts of Ottawa and Kitchener-Waterloo, pointed out their property values have increased significantly following construction and that they expect to benefit from additional traffic. A couple of those along the West LRT route in Calgary mentioned that they advertise to their customers that the line is close by and makes their business more accessible.
 - Those in less dense and more historically car-centric locations, on the other hand, were more likely to question whether there will be a longer-term benefit to having the LRT near their business. Some of those interviewed in more suburban areas (such as Glenmore Landing in Calgary, Ottawa's east end or southeast Edmonton) pointed out that they often see empty train cars on these lines and really wondered whether the headaches they experienced as part of construction will be worth it for their businesses.

Short and Long-Term Impact: Calgary Businesses

"It was hard - it wasn't just for those months. It was down 20 per cent, I'd say, for three years and then more when (the construction) was in front of me."

- Business on 17th Ave. S.W.

"I think we probably even bounced back before because I think some of the construction eased off from the roads. Whenever the road traffic wasn't affected, we were fine."

- Business along West LRT

"It started (coming back) actually when (the construction) moved more to the west side. It started getting better and improving. It came back quickly, it didn't take long."

- Business along 17th Ave. S.W.

"But once everything got completed, it was a good aspect for us. It's another addition that we have a train station next door to us. It makes it 10 times more accessible for individuals to come to our facility."

- Business near West LRT

"That whole part of 17th Avenue, there was a Moxie's there, there was Boston Pizza, there was quite a few other places, everyone's gone under. There's no one left. They just never recovered after that closure."

- Business at Glenmore Landing

Short and Long-Term Impact:

Other cities

"All I can tell you, I don't know how, but we had better business after they opened the LRT than before. It was good before, we lost a lot, but it's much better after. Much better."

- Business in Ottawa

"(It's) hard to say because of COVID, everything is so crazy these days. One month can be our best month we've ever had and then the next month you have zero income."

- Business in Toronto

"We get some (staff) that are actually from Toronto. So, they have a long way to go. And busing is not always all that great on that line. So, for them to be able to use the LRT, I think it will make a big difference."

- Business in Mississauga

"I think it was bringing more people downtown or at least making it easier. The traffic was better. People were able to come downtown and pick up their projects. I think it made things a lot more convenient."

- Business in Ottawa

"The one thing now, five years later, whatever it is since this started, I can safely say I know that our property values have gone up and the tax values, too. But at the end of the day that would be the only bonus or plus to this whole thing."

- Business in Kitchener-Waterloo



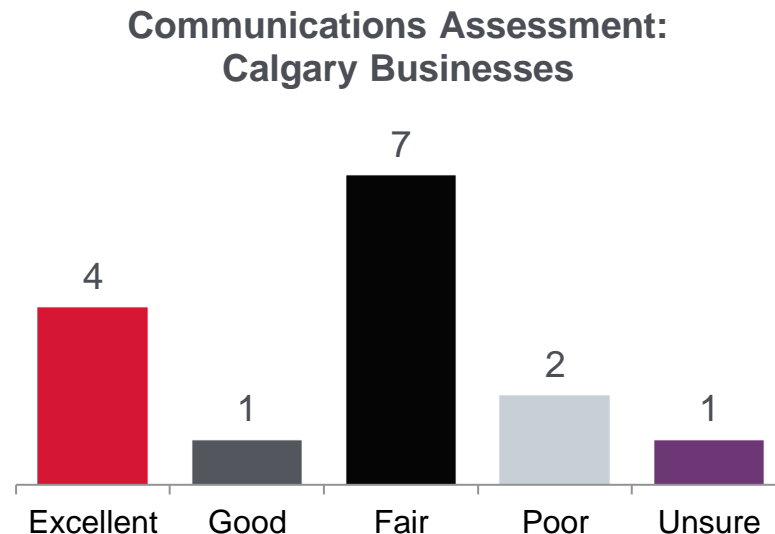
Communications Evaluation/Assessment

This section examines how businesses in Calgary and elsewhere felt about efforts to keep them informed about construction.

Communications Assessment

Calgary Businesses

- Calgary-based participants had mixed views on how well The City communicated with them about construction. As a general rule, those who interacted directly with someone – either in-person or over the phone – tended to have more praise for The City's efforts to keep them informed. Those who had less direct interaction were more likely to rate the degree of engagement as fair or poor.
 - Those who experienced a more recent construction project (such as 17th Ave. S.W.) were more likely to report having sustained communication from The City, and therefore to rate them more positively. Those who experienced transit-related construction a long time ago (such as those along the West LRT) were less likely to recall experiencing the same degree of in-person or telephone communication with someone from The City.
- Businesses at Glenmore Landing mentioned receiving email updates from The City and overall, most felt these were an effective way of keeping them informed. When asked what they would prefer when it comes to communication, most businesses expressed a preference for receiving information via multiple touchpoints, including in-person and telephone consultation, with emails used to provide updates.
- There were mixed views on receiving items in the mail, with some saying they would be helpful if they were short, illustrative and written in plain language – but others indicating they are more likely to be overlooked.

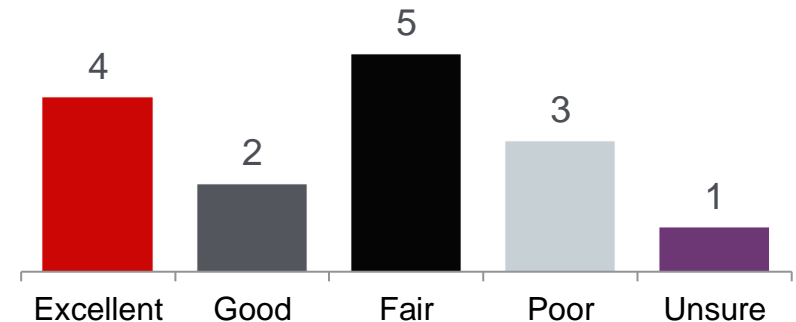


Communications Assessment

Other Cities

- Participants had mixed views on how well their local governments or transit agencies communicated with them about construction.
- As was the case in Calgary, those who interacted directly with someone in-person or via telephone tended to have a more positive assessment of how well they were informed, with those who had less contact not providing a high assessment of their municipality's efforts.
- One of the frequent complaints raised by some businesses elsewhere was that communication and engagement was more intensive during the pre-construction phase, but that once construction began officials became less responsive. There were two perceived reasons for this. First, some pointed out that there are more actors involved once construction is underway, including construction contractors, utilities, the municipality and/or transit agency, etc. For some, it was difficult to know who exactly to go out and speak with as issues arose. Second, some felt that engagement liaisons they had engaged with prior to construction tended to shift their focus to other areas once construction was actually underway.
- Those based in Toronto were especially critical of their government and the local transit agency (Metrolinx) and their efforts to keep people informed. While some mentioned that they received regular email updates (which was perceived to be somewhat helpful), they noted that this organization set up liaison offices in local neighbourhoods. However, these businesses pointed out they were not allowed to go into these offices if they had a more specific complaint and that staff from them were not always very responsive.

**Communications Assessment:
Other Cities**



Communications Assessment (cont'd)

- Perhaps the biggest complaint when it came to communication – which was echoed to the greatest extent by businesses along 17th Avenue S.W. in Calgary and Eglinton Avenue in Toronto – was that officials were not sufficiently clear about the scope and duration of the construction.
 - In the case of 17th Avenue S.W., some businesses indicated they did not realize just how extensive construction would be based on the initial information provided by The City of Calgary.
 - In the case of Eglinton Avenue, businesses expressed a great deal of frustration with significant and ongoing construction delays and wished that both Metrolinx and the city government been clearer about how long construction would last.
- When it comes to communication, businesses were most likely to value clear, honest updates about how long construction would last. This was among the most common desires, and one many business representatives felt municipalities and transit agencies too often failed to provide.

"It wasn't very clear about what exactly was going to happen. It just said construction. So when I think of construction, I think of everyday construction, like you have to go around guys on the street, and it's kind of irritating, but the road is still open. So, it took a while to realize that the road was actually going to be closed."

- Business on 17th Ave. S.W., Calgary

"I would say poor because you never knew what's happening unless you kind of heard it on the radio or news. That's where you'd hear the delays, too. They weren't very direct with the business owners on Eglinton, at least from our perspective. It's not like we were getting calls, updates or anything like that."

- Business on Eglinton Avenue, Toronto

Communications Assessment (cont'd)

- Participants who lease their properties were also more likely to point out there was a gap in communication, as the municipality/transit agency provided information to the landowner only. In some cases, the landlord proactively provided their tenants with information, but in other cases the businesses felt they were not sufficiently informed because their landlord did not pass along the information.
- When it came to evaluating the frequency of communication, participants in both Calgary and other cities generally felt their local government communicated with them often enough. Those who were more dissatisfied with communications overall were more likely to say they would have preferred to receive more communication and outreach from municipal officials.
- Even though there were some challenges with the degree of communication, the majority of participants in both Calgary and elsewhere also felt they were provided with enough time to make preparations prior to construction actually taking place.

“So because I had that good communication (with the landlord) I was able to know. But personally, nothing came to our unit number that was ‘Hey, this is what’s occurring on our street and this is a new projection of what’s going to happen.’”

- Business along West LRT in Calgary

“They came a couple of months before and they told us that this road was going to be blocked like that. They told us ahead of time. Of course, we were prepared.”

- Business along West LRT in Calgary

Resolution of Complaints

- Among Calgary-based businesses, only about a third of those interviewed said they actually took the step of raising a specific concern or complaint with The City. The manner in which this was done varied to some degree, with some contacting what sounded like public engagement staff and others reporting they (or someone else in their business) contacted their councillor. All but one of these five individuals who made a complaint said they felt like they were listened to and that The City did what it could to act upon their complaint.
- Half of those interviewed in other cities, meanwhile, said they made a complaint - with others saying they would have considered doing so but felt it was not worth it to do so.
- Those business owners in Kitchener-Waterloo and Toronto expressed frustration with the responsiveness of local officials, with a couple saying they were hard to reach and did not always return phone calls. One business owner said these officials kept redirecting them to the website rather than directly answering their question, and that this was frustrating.

"I always had someone to talk to at the beginning. 'OK, you got a backhoe sitting in the middle of our driveway. Can you move it?' 'Oh, yes. So we'll get right on it.' And they were fast; they jumped. So I give them credit for that. ... But like I said, it went from excellent to fair to poor. I think the worst thing is they moved away from our business and then they moved their phone service away from our business. (It was) 'OK, we don't talk to him anymore. Let's go to the next one.'"

- Business in Kitchener-Waterloo

"I believe that I called to complain that my customers were leaving the store because of their noise. .. They explain(ed) it. They know. And they did a good job, yeah. They explained what was happening. And I believe that they said that they would stop for a little bit, you know, something like that."

Business along 17th Ave. S.W. in Calgary



Views on Assistance for Businesses

This section explores perceptions of the degree of assistance offered to businesses during construction, as well as provides an assessment of potential supports that could be offered during Green Line Construction.

Views on Business Assistance

- In both Calgary and in other cities, business owners did not perceive their municipality as providing them with much assistance – although once the conversation unfolded, it became apparent that these municipalities did, in fact, offer some support, even if it was limited in scope and not to the level businesses hoped for.
- Many of those interviewed said their municipal government provided signage directing potential customers to their businesses, although several said that overall, these efforts were not that helpful. Several of these participants felt the signs used were too small and not prominent or enticing enough to really attract people to their businesses.
- A few participants located in denser urban areas (such as Toronto) noted that in some cases the city removed parking restrictions from nearby side streets, which they said was helpful because this meant their customers did not have to walk as far from their vehicles to their business. Other businesses, however, said their local government kept some of these parking restrictions in place, which they – and their customers – found aggravating.

“So as far as I know, there wasn't anything. Not that I am personally aware of, no.”
- Business at Glenmore Landing

“It was hard with the heavy construction ripping out all of the sidewalks. We could have put some signs facing the street because we get a lot of cars that drive by and we get more advertising for our business and walk-ins.”
- Business on 17th Ave. S.E.

“Side streets have no parking or whatever, so what the City did was they would get rid of that and allow(ed) people to park on the side streets... that definitely did help.”

- Business in Toronto

“They made a little entrance to our restaurant, but there was no parking. People were parking on the government parking and getting tickets.”

- Business in Ottawa

Views on Business Assistance (cont'd)

- Some participants pointed to specific things their city government (or the contractor) did to essentially “make things right” when they suffered some degree of obvious damage related to construction. This included replacing computer monitors broken vibrations (in the case of one Calgary-based business) to the contractors on Ottawa’s Confederation Line repaving a business’s parking lot after their heavy vehicles had been parking on it during construction.
- Similarly, a couple of individuals mentioned that getting some degree of business from those involved in construction was also helpful. For a restaurant owner, that meant having construction crews and inspectors eat in their restaurant from time to time, while for another contractor it meant getting an opportunity to supply a product to construction crews. For these individuals, the benefit of unanticipated business mitigated, to at least a small degree, an overall decrease in business due to construction.
 - In many cases, these relatively inexpensive gestures paid dividends in terms of fostering goodwill and making the business feel like their most significant frustrations were addressed.

“We had such a good experience with the LRT part of it. It was frustrating the one day when we came in and the computer monitors were on the ground. But then when the guys gave us new ones, it looked like they’re being good about everything.”

- Business along West LRT

“All the managers, all the people who were like from out of town working on this project, they used to come here and let us know everything about what’s going on. ... They would bring more people to eat here and they (would) make appointments here, meetings here. They really helped us a lot.”

- Business in Ottawa

Expectations of Financial Relief

- In other cities, several participants wished that their municipality would have provided some degree of property tax relief to those most affected by the construction.
 - Those in Toronto, Kitchener-Waterloo and Ottawa were especially likely to focus on this, as their chief frustration had to do with the amount of time required for construction to be completed. These businesses pointed to sustained losses over a long period of time and said they and many others in their area have asked their city government for some degree of compensation, whether in the form of an outright break on their municipal property taxes or waiving certain fees, such as business licenses.
- Calgary-based businesses who experienced construction were less likely than their counterparts elsewhere to go this far, with most wanting “help” to take other forms (such as better signage, promotional activities to attract businesses, etc.) or simply steps to alleviate the specific frustrations associated with construction.
 - A small number of business owners, however, did say it would be helpful to receive some degree of financial relief, such as waiving licensing fees or other costs paid directly to The City that are required as part of doing business.

“That’s the most disappointing thing that I saw in this region. From the regional standpoint, from our government standpoint, not a penny. Very disappointing.”

- Business in Kitchener-Waterloo

“My taxes, of course, have to have the regular increase, which I get, our operating costs as a municipality, they don’t go down. They never will. But perhaps just an equilibrium while development is going on or something of that nature.”

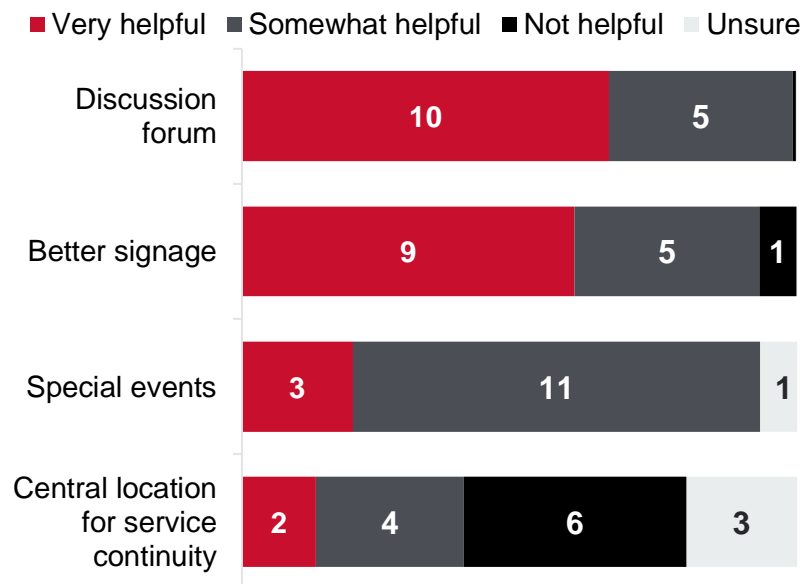
- Business in Edmonton

Assessment of Potential Supports

Calgary businesses

- Calgary-based businesses were asked to evaluate four ideas that could potentially help those who will be affected by the Green Line. Overall, most businesses thought efforts to offer improved signage near businesses and creating an online discussion forum for businesses to share ideas and feedback would be very helpful. Those that advocated for this expected it would keep businesses informed and provide them with an opportunity to share ideas and criticism, thus allowing them to feel heard.
 - There were mixed views regarding hosting special events, with some indicating these would be helpful and others noting that similar efforts along 17th Avenue S.W. were not successful because people continued to avoid the area for a prolonged period.
- Most business owners did not think setting up a centralized point for business service continuity would be helpful, as they felt it would be inconvenient to go elsewhere to drop off waste/recycling or pick up items from couriers. Some, however, did like the idea of offering additional retail space in a more accessible area for those who may be able to benefit from this.
- Some of the additional ideas that were suggested included incorporating murals and public art to beautify areas near where construction is taking place, as well as having in-person meetings with local businesses in addition to an ongoing online discussion forum.

Assessment of Potential Supports (Calgary Businesses)



Assessment of Potential Supports (cont'd)

Calgary Businesses



Online discussion forum

"Very helpful ...just to keep everybody in the know and for the business owners to have some say or maybe bring something to light, that the planners overlooked, that type of thing."

- Business in Glenmore Landing

"That sounds very helpful... the ability for business owners directly affected and perhaps substantially affected by the project, would just have that easier access to have input and feedback with respect to what's being contemplated."

- Business on 17th Ave. S.W.



Better signage

"Something (signage) just to say, 'Hey, these businesses are over here' - something that's fairly prominent that's going to let people know that "on the other side of this construction, this particular business is there."

- Business along the West LRT

"If you're talking about those little orange ones (signs), if I'm somewhere with construction, I don't find those all that helpful. But if maybe they were a little bit bigger... especially in some of the areas where it's sort of congested."

- Business along the West LRT

Assessment of Potential Supports (cont'd)

Calgary Businesses



Special events

"We did try to do that. It wasn't as well attended as we'd hoped because, again, it's a disaster, right? Like it's like an open pit. So, people are already frustrated with the whole thing."

- Business along 17th Ave. S.W.

"I just know with our economy right now ... unless the meeting was literally in front of my building, I don't know how many people would actually show up to this area, but it may be somewhat helpful."

- Business along the West LRT



Centralized point for business service continuity

"Being able to say, you can take your stuff and put it to this other spot - I mean, now you have to go and pick it up. I can't imagine that would be all that much helpful because you're getting everybody to do everything twice."

- Business along the West LRT

"I know a few business owners that are on 17th (Ave. S.W.) and they have their business kind of cut off from the front. Any type of resource that could help a business have a little bit easier transition during construction period is always helpful."

- Business along the West LRT



Advice/Suggestions Related to the Green Line

This final section provides participants' perspectives on what the City of Calgary should keep in mind as it proceeds with construction on the Green Line, including how to communicate about and mitigate the impact of construction on local businesses.

Advice for the Green Line

- When thinking about how the City of Calgary should work with businesses to deal with the effects of construction on the Green Line, there was a high degree of unanimity among both Calgary businesses and those located in other cities that high-quality, honest and direct communication about the construction process is a must-have. More than anything, businesses said The City needs to be clear and transparent with businesses about when construction will occur, what the specific impact to their business will be and whom they should reach out to if they have concerns.
- One of the key pieces of advice offered by those who had been through the experience of construction in other cities is to ensure The City has a way to hear from all businesses – not just those who are most vocal about bringing forward complaints. These businesses stressed The City should make sure that it clearly communicates how the Green Line will benefit their business, the neighbourhood and the city overall and be sure to point these benefits out as much as possible to create buy-in.



"You've got to stick to your guns and know that you're going to get complaints no matter which way you do it. But if it's for the benefit of the whole city, you've got to put up with it. There's going to be a few that suffer, but the majority are going to enjoy it or take advantage of it."

- *Business in Toronto*

“Just (do) more public awareness other than, ‘Hey, we’re building this, it’s coming.’”
- *Business in Kitchener-Waterloo*

Advice for the Green Line (cont'd)

- Businesses in other cities who had been through this experience stressed that it is especially important to provide sustained and ongoing communication, preferably from dedicated staff who are easy to reach and who proactively engage businesses prior to construction beginning. Those who were deeply critical of the job their municipalities did during construction and frequently mentioned that their frustration was made worse by either:
 - Not knowing whom to get a hold of;
 - Project/engagement staff being unresponsive – for instance, by not returning calls in a timely manner, or not being available at their on-site office; or
 - Not being able to provide enough information or specific answers, as some businesses felt frustrated they were only given pat responses when they had more detailed questions about the effects of construction.
- Some of these businesses also noted that having City staff contact businesses directly also means they are more likely to hear about things directly and eliminates the possibility their landlord will not inform them of when construction will occur. Some also advocated for City staff to check in frequently and give businesses a forum for sharing concerns or feedback.

"I think they have to actually literally drop off notices to people's buildings instead of having it done by ... the BIA (Business Improvement Association). Some people just don't read their emails or especially language differences or whatever."

- Business along 17th Ave. S.W.

"I think having those initial conversations and understanding what the impact might be and I think that regular check-ins – this was a two-year project and I think it would behoove them to perhaps every six months have a conversation to say what is the impact?"

- Business at Glenmore Landing

Advice for the Green Line (cont'd)

- One of the key points made by businesses – especially those in other cities – is to ensure there is better project planning in place about when the most disruptive components of construction will occur.
 - These businesses – especially those in Toronto, Kitchener-Waterloo and Ottawa - pointed out they would especially want a clear sense of the milestones, as the most aggravating aspect of their construction experience was that it took much longer to finish the project than initially anticipated. These businesses hoped those along the Green Line route will be given a clear sense well in advance of when construction will finish, and that this timeframe will be met.



Construction on the Eglinton Avenue LRT in Toronto
Source: BlogTO

“Plan ahead and support the small businesses, because no matter what they think, it's probably going to have a far greater impact on the small retailers than the planners say it will. And also, from our experience here, there's construction timelines that are published which I don't think on any project like this are ever adhered to. There's always overruns in time and cost.”

- Business in Kitchener-Waterloo

“You've got to have accountability. Accountability means that somebody has to be accountable for their promises to finish on budget. ... I think that would definitely bring more trust from the businesses and the locals.”

- Business in Toronto

Advice for the Green Line (cont'd)

- As noted earlier, some businesses also suggested The City can build goodwill by addressing other easy-to-solve problems, such as removing no-parking signs near businesses or quickly fixing parking lots and curbs after construction has been completed. Some also mentioned that The City needs to ensure construction crews keep pedestrian access points clear of debris, especially for businesses that rely on walk-up traffic (and as an accessibility measure).
- A few businesses also recommended staggering construction or staging it in a way that it is less detrimental to businesses. This could include completing construction in stages, or only doing extensive work in a small area rather than making a larger area under construction for a longer period of time.
- Some businesses also urged The City to ensure there is a sufficient degree of support for businesses in place. While some suggested providing financial assistance to some degree, others focused on items such as better signage.

"On the sidewalks especially, you got seniors, you got people with wheelchairs, crutches, walkers and stuff that we see struggling during construction times because the walkways aren't kept clear."

- Business on 17th Ave. S.W.

"Make sure there's strong communication where they're doing their work with those businesses, and I think they got to know there's going to be a percentage of businesses that aren't going to make it."

- Business in Kitchener-Waterloo

Impact of COVID-19



- When businesses were asked to consider what impact, if any, COVID-19 may have on those about to be impacted by Green Line construction, it was clear many had not taken this into account earlier – but once they thought about it, they were highly mindful that prolonged construction could be devastating for these businesses.
- Many of those interviewed said The City needs to take into account the fact these businesses – especially those in the retail, accommodations and food services sectors – have struggled significantly in the past 12 months and may not be able to survive if their customers stay away further due to construction-related issues like congestion, lack of parking, etc.
- When asked what could be done to help these businesses, some suggested staggering construction so that it takes place incrementally, doing so in a way that ensures access to these businesses is not affected for a longer period of time.
- Some also suggested The City needs to consider doing more to provide direct supports to businesses, including by offering some kind of financial relief – either a reduction in property taxes or by reducing other costs, such as waiving business license fees.
 - Although this was not a widespread view, some businesses mentioned that since so many companies survived due to assistance from the federal and provincial governments during lockdown, it may be justified for The City to provide some type of financial aid for those who will be most severely impacted by construction on the Green Line.

Impact of COVID-19 (cont'd)



"It's probably a broken record thing, but our taxes, my operating costs are probably almost 30 percent of my rent. So even if you're only paying your operating costs, it's still significant."

- Business on 17th Ave. S.W.

"I don't know what you could possibly do. I'm just trying to think of other businesses and how it would affect them. There's no access, and then you've got COVID on top of it. Nobody's going to show up. ... yeah, that's just adding fuel to the fire."

- Business along the West LRT

"I would definitely say maybe not increasing property taxes at that time - putting a hold on it to give some sort of a financial benefit that the company doesn't have to go and struggle and try to apply for. Maybe giving a reduction on the business license fees. You know, something - anything helps out a business."

- Business along the West LRT

"Certainly if there's anything in the way of tax reductions or even business licensing fee reductions that can be made so that people feel like The City is doing something to help them out as much as they can."

- Business in Edmonton



Green Line Stage 1 Business Support Program

What We Heard
Fall 2020 – Spring 2021

Engagement program overview

In 2015 a Notice of Motion was put forward by Councilor Druh Farrell (NM2015) in order to proactively address any negative construction impacts that may be experienced by businesses along the Green Line LRT alignment. In the Notice of Motion, Councilor Farrell directs:

Consult with the impacted business community to develop a Business Support Program, and report to the Standing Policy Committee on Transit and Transportation, prior to commencement of construction of the Green Line.

This report outlines the formal public engagement completed, as well as what we heard through that engagement. However, it is important to note that the project team has and continues to consult with, and support businesses impacted by Green Line LRT and enabling works construction activities.

The formal public engagement program initially focused on four phases of engagement:

1. Educate and Inform
2. Set Program Objectives
3. Build and Refine the Program
4. Report Back

Engagement was planned to broadly reach businesses along the Stage 1 alignment as well as to focus on engagement with a more targeted group of business and community representatives which make up the *Business Insights Panel (BIP)*, which was launched in January 2021. Engagement with both groups (broad and targeted) was planned to occur between Fall 2020 and Summer 2021 with the first phase of engagement beginning in November 2020. While the *Educate and Inform* phase was launched and program information was shared on the Green Line website and throughout the Functional Plan engagement sessions, it came at a difficult time for businesses. With Covid-19 cases rising, businesses facing provincial restrictions and the resulting stress and distractions that came as a result, this phase saw minimal participation.

Adapting to the impacts of the Covid-19 pandemic

In Early 2021, the engagement plan was revised in response to what we learned through the challenges in phase 1. The team revised the strategy to re-launch broad public engagement in Spring 2021 anticipating, based on Covid-19 experiences of Spring 2020, that businesses would gradually begin to open and get back to normal. We hoped this would make for an effective and respectful time to engage businesses. However, as the third wave rapidly climbed and businesses once again faced new provincial restrictions and stresses, and with consideration to input from the BIP, the decision was made to indefinitely postpone broad public engagement until there was more detailed information to share with businesses about specific Green Line LRT construction impacts.

To ensure development of the Business Support Program (BSP) framework remained informed by insights from business and community members, the team maintained the focus of connecting with members of the BIP. This engagement has been used to inform our approach to supporting businesses and to ensure that local business perspectives have been considered.

The Business Insights Panel (BIP)

The role of the Business Insights Panel (BIP, The Panel) is to provide perspective and make suggestions to the project team regarding the development of a business support program. While the expertise of The Panel is used by the project team to help inform project decisions, The Panel is not a decision-making body; decision-making authority remains the responsibility of the Green Line project team.

Membership was structured to include business perspectives from along Stage 1 of the Green Line LRT. While we received a thorough response from Business Improvement Areas and Community Association representatives, initial efforts to recruit public business members from targeted areas were paused by the Covid-19 challenges described above. At the time of writing this report, membership consists of:

#	Member		#	Member	
1	Inglewood BIA	Filled	11	Crescent Heights BIA	Filled
2	Ramsay CA	Filled	12	Eau Claire CA	Filled
3	DouglasQuarry CA	Filled	13	Chinatown BIA	Filled
4	Millican-Ogden CA	Filled	14	Victoria Park BIA	Filled
5	Highfield area (recruited)	Not filled	15	Calgary Downtown Assoc.	Filled
6	Shepard area (recruited)	Not filled	16	Beltline BIA	Filled
7	Public (recruited)	Not filled	17	Public (recruited)	Not filled
8	Public (recruited)	Not filled	18	Public (recruited)	Not filled
9	Program Manager	Filled	19	BIA Liaison (City)	Filled
10	Program Lead	Filled	20	Engagement staff	Filled

What did we do?

To date, four components of the engagement program have taken place:

1. Initial online public engagement including recruitment for the BIP
2. Regular meetings with the Business Insights Panel
3. In-person and virtual alignment “walks” with members of the BIP
4. Research to learn from other Canadian business experiences

1. Initial public engagement

Initial engagement included launching the “Educate and Inform” phase. This involved robust promotional efforts with the intent of:

- Driving people to the website to learn about the business support program

- Recruiting public members to join the Business Insights Panel
- Collecting feedback on initial engagement questions

As described earlier, this initial effort saw minimal participation. Following this initial effort, both public recruitment for the BIP as well as efforts to engage the broader business community were halted and the engagement strategy was revised.

2. Regular meetings of the Business Insights Panel

At the time of writing this report, the BIP has met five times:

Meeting	Date	Meeting topics
Meet and Greet	January 12, 2021	Members met as a group for the first time
#1	January 26, 2021	<ul style="list-style-type: none"> • Introductions • Terms of Reference (TOR) • What is Business Support? • Engagement Approach • Wrap Up
#2	February 23, 2021	<ul style="list-style-type: none"> • Welcome • Meeting #1 Recap • Program Objectives • Interactive Review of Program Objectives • Connecting with Businesses • Wrap Up
#3	March 30, 2021	<ul style="list-style-type: none"> • Welcome and agenda review • Opening remarks from Chair • Review revised program objectives • Review May engagement tactics • Connecting with businesses in May • Wrap Up
#4	May 25, 2021	<ul style="list-style-type: none"> • Welcome and agenda review • Opening remarks from Chair and project update • Notice of Motion Report update • Review of lessons learned to date • Group discussion about initiatives & applicability • Building a business database • Wrap Up

3. Business Insights Panel Alignment Walks

In May 2021, a series of virtual “walks” were held with members of the BIP. Initially intended to take place in-person, rising Covid-19 cases and new Provincial restrictions necessitated the walks take place online. The team adapted to this need and facilitated a suite of effective and informative virtual walks with BIP members. While all members were offered walks, it was also explained that walks could be held at a future date if the timing was not good for the member.

The walks followed the Green Line alignment in specific communities/business areas along the Stage 1 alignment, with a focus on business and/or community areas that may be affected by future construction.

The purpose of the walks was to:

- Spend time with BIP members at an individual-community-level, and further establish our relationships;
- Build our local understanding as we develop our business support program framework; and
- Learn more about the attributes of businesses in specific areas and gain familiarity with any specific issues or concerns associated with Green Line construction.

Learning about the local contexts along the alignment, supports the team's ability to plan for potential business supports and construction mitigation measures ahead of construction.

Walks conducted include:

Date	Time	Area of focus
May 19 2021	1:30-3:00 p.m.	Ramsay and Inglewood
May 20 2021	1:45-3:00 p.m.	Lynnwood and Millican Ogden
May 20 2021	4:00-5:15 p.m.	Eau Claire
May 25 2021	10:30-12:00 p.m.	Crescent Heights
May 26 2021	1:30-2:45 p.m.	Victoria Park and Beltline
May 31 2021	1:15-2:30 p.m.	Downtown

4. Research to learn from other Canadian business experiences

The project team also commissioned a research program to better understand the experience of Canadian businesses, including Calgary businesses, who had been through similar construction. The focus of this research included:

- The experiences of business located within Calgary that have dealt with both transit and non-transit related construction in recent years; and
- The experiences of businesses located in other Canadian cities, including Toronto, Ottawa, Edmonton, Kitchener Waterloo and Mississauga, where light rail transit lines have been constructed recently.

The City commissioned Probe Research to conduct a series of 30 in depth interviews (IDIs), including 15 with representatives of Calgary based businesses and 15 interviews with representatives of businesses in these other Canadian cities. The interviews were completed between March 8th and March 27th, 2021. These conversations followed two customized discussion guides: one for Calgary businesses and one for businesses located in other cities, with the intent to understand how best to connect with businesses located along the Green Line alignment and address their potential concerns, while also helping them deal with the negative impacts of construction.

What did we hear?

1. Initial public engagement

As described earlier, only a handful of comments (10) were received; roughly half of which were not relevant to the questions asked. This initial phase of engagement did not provide sufficient feedback to inform the program. A consistent comment we did hear from members of The Panel was the need for businesses to have more detailed information to enable meaningful input into the program and initiatives. The project team will continue to engage impacted businesses and the business community at large to inform the initiatives throughout the construction of the Green Line LRT, and particularly when there is specific and relevant information to share.

2. Regular meetings of the Business Insights Panel

A summary of each meeting is shared below.

Meeting #1, Jan 26, 2021: welcome, program overview, and getting to know the membership

BIP members shared their initial impressions of the business support program. Many opinions were shared, but some consistent themes emerged:

- The need for Green Line to understand unique and distinct business needs
- The importance of communicating accurate construction timelines and impacts, and avoid false starts (which create skepticism and distrust)
- Recognizing the cumulative impacts of concurrent and/or subsequent construction work
- The desire to think outside of the box, and try to implement meaningful supports for high-impact businesses
- Businesses are facing many stressors now, and it may be difficult to grab their attention without real and specific construction plans

Additional details are retained in the meeting minutes held by the project team.

Meeting #2, Feb 23, 2021: reviewing program objectives

The project team presented a draft set of BSP program objectives for review by the BIP. Each program objective was reviewed and discussed, asking members to evaluate the importance and effectiveness of each.

Members expressed a desire for the team to simplify and reduce the overall number of program objectives, simplify wording and reduce City jargon.

In addition, we heard the importance of:

- Safety (and accessibility)
- Construction timeline communications
- Maintaining an up to date business database
- Cultural and language support (accessible)

Additional details are retained in the meeting minutes held by the project team.

Meeting #3, Mar 30, 2021: review revised program objectives and public engagement tactics

The project team returned with a revised set of program objectives based on the feedback received by the BIP at meeting #2. Highlights of the updated version include:

- Fewer objectives

- Simplified wording
- Additions/amendments to reflect themes heard:
 - Safety (and accessibility)
 - Construction timeline communications
 - Up to date business database
 - Cultural and language support (accessible)

BIP members were asked for additional feedback and expressed an overall approval to proceed with the updated objectives. Discussion included a general agreement that The City will not be able to ensure that no business is affected; but that it is important to do the best we can and set realistic expectations. The importance of transparent communications and setting communities up for success by preparing them for construction impacts was also discussed.

Following this discussion, the group was provided an overview of the tactical approach to broader public engagement, then scheduled for May. Some themes from feedback received include:

- The importance of effective engagement with Chinese-speaking business owners. Standard surveys do not work, and a door to door approach has proven more effective
- The challenge of trying to engage businesses without having concrete construction plans available to share
- A willingness of BIA representatives to assist communicating with businesses
- The potential challenges associated with rising Covid-19 numbers* (* this turned out to be severe enough that broader public engagement was postponed indefinitely, out of respect for the challenges businesses were facing)

Additional details are retained in the meeting minutes held by the project team.

Meeting #4, May 25, 2021:

At this meeting the project team presented a summary of the many streams of research and lessons learned being explored. These include:

- Review of similar construction projects and business supports from across North America
- Meetings with the Business Insights Panel
- Research to learn from other Canadian business experiences (commissioned by the City of Calgary, described below)
- Review of lessons learned from other City of Calgary projects

Following the review, The Panel engaged in discussion based on the following questions:

- i. After hearing about these lessons learned, what stands out? Is there anything you wish to comment on?
- ii. What seems to have good applicability in your area? Is there something should we be exploring more? Conversely, are there any initiatives that don't seem as applicable?
- iii. We are curious about the online forum that arose in the business interviews. Do you think something like this could be useful? Have you experienced or tried something similar?

Panel members shared that the lessons learned review appeared to be very relevant. The need for frequent and timely communication of accurate information was highlighted as critically important. It was explained that this could be done through on the ground staff, phone updates, as well as a frequently updated web resource such as real-time parking availability maps. Some members also expressed the importance of understanding adjacent or cumulative impacts brought on by other City of Calgary/partner projects.

One gap highlighted as missing from the lessons learned was the need for multi-lingual and culturally appropriate communications, particularly for places like Chinatown and Centre Street N. It was recommended to have at least one staff who speaks Mandarin or Cantonese.

Finally, members emphasized the importance of building a robust stakeholder database. Recognizing the different needs, abilities and preferences of the many stakeholders was also highlighted as important.

Additional details are retained in the meeting minutes held by the project team.

3. BIP Alignment Walks

Each community “walk” presented unique circumstance and detail for the project team to consider. Some highlights emerged as consistent themes across most walks and are shown below.

Top Themes

- Parking impacts are extremely frustrating for community members, especially in areas without driveways or designated parking
- Ongoing noise is particularly frustrating, and there are concerns for businesses and community members residing most closely to anticipated construction areas
- Pedestrian access is important to maintain, both to businesses as well as through communities. Long detours are especially disruptive to pedestrians
- Businesses and residents alike expect timely and up to date notification of impacts and changing plans. Communications must also consider those living and working on the periphery of the alignment/ construction zone
- There is a strong desire for The City to understand the cumulative effects of all construction impacting an area. In addition, construction plans should consider recent activities, historic decisions and ongoing community context

Highlights from each walk are shown below. Full meeting minutes have been retained by the project team and will be referenced through project planning.

Ramsay and Inglewood Virtual Walk – May 19, 2021

- Ramsay is growing its businesses but remains somewhat industrial which adds to the character of the area; Inglewood is an area characterized by a lot of change and ongoing development pressure, resulting in sensitivity to construction
- Parking is a “trigger word” for many residents and businesses; construction vehicle parking should remain in laydown areas
- The recently added mobility lane on 11 Street SE was a big win after years of effort; it’s important to be mindful of this going into construction and effort should be made to no “undo” what’s been achieved

- There are some unique shops around Portland Street and at the corner of 26 Avenue and Blackfoot Trail that have limited access points
- Businesses depend on people accessing the area via all modes to remain successful.
- There is an opportunity to utilize local communication channels and even partner with local businesses to support communication and awareness activities. Communicating beyond the actual construction area is also important (i.e. periphery)
- Other concerns include water and electricity shut offs; dust affecting patios;
- Many more localized/specific details are included in the meeting minutes.

Lynnwood and Millican Ogden Virtual Walk – May 20, 2021

- Ogden is an area characterized by a rich history and small-town feel, however, is now facing increasing change and development pressure. While some people are embracing change, many others are frustrated by it.
- There are many residential homes that are very close to the alignment and that will be highly affected by construction; there are not a lot of businesses, but there are some who operate very close to the alignment
- Ogden Road has become a major commuter road and construction impacts are likely to cause major disruptions and frustrations. The community goal, however, is to see that road turn into more of a business-oriented main street in the future
- There are some potential laydown areas that could work but they need to consider things like access to sports fields (Pop Davies Park) and winter tobogganing (near 78 Avenue).
- 78 Avenue project needs to remain highly sensitive to the people living there – many whom live in Calgary Housing – and sensitive to the SE Community Resource Centre that operates on 76 Avenue. Because of delays in construction the project will need to be re-communicated in advance
- Many more localized/specific details are included in the meeting minutes.

Eau Claire Virtual Walk – May 20, 2021

- Eau Claire is a community characterized by walkability, residences, visitors, and appreciation for the “riverfront lifestyle” and surrounding environment
- Green Line will be the next round in many years of construction. This is likely to be very frustrating for residents and businesses and construction needs to be approached with this understanding
- Residents walk frequently, especially along 2 Street SE as well as by way of the Plus 15 systems. Construction plans should consider this and maintain the walking experience i.e. maintaining access to Plus 15s and creating walking shelters adjacent to construction (e.g. shipping container walkways).
- Most businesses are currently in the Eau Claire Market. However, there are also some major office towers as well as businesses in the Plus 15s that depend on foot traffic. Other important community resources include Kids & Company Daycare, The Sheraton Hotel, and the Blood Donor Clinic in Eau Claire Market
- Considering the alignment travels the line between Eau Claire and Chinatown, there is a desire for both communities to be looked at as a whole. Areas adjacent to the alignment also need to be considered, as they will be affected by things like truck traffic.
- Residents are expecting a real commitment to having their construction questions answered. Advance notice is expected as is notice of emerging impacts and changes.

- Many more localized/specific details are included in the meeting minutes.

Crescent Heights Virtual Walk – May 25, 2021

- Crescent Heights is a community highly characterized by walkability, diverse ethnic backgrounds and mixed age groups. The nearby high school adds a lot of teenage foot traffic. It is currently a highly used vehicle corridor as well.
- The last 10 years have seen many improvements and the new BIA is helping the growing business environment. Things like events, planters and new waste management containers have been helpful. It's becoming a destination area where many people come to stop and quickly grab food.
- There is a new community food hamper/refrigerator that is seeing a lot of use. Access needs to be maintained
- Considering the seniors who live in the area, as well as the Chinese seniors that often travel on foot between Chinatown and Wing Kei Seniors Care Residence, pedestrian access needs to be maintained, and the project should be very mindful of how long-detours and steep slopes may affect these individuals
- Parking is an issue along Centre Street and businesses depend on parking availability. The busiest area is between 8 Avenue and 9 Avenue (for parking and pedestrians), but there is a desire for a parking strategy along the entire street
- Many businesses are social media savvy and can help get up to date information out to support customers accessing their business. The new mural (Magic Walk) further south on Centre Street could also be used as a communication channel if done right.
- Many more localized/specific details are included in the meeting minutes.

Victoria Park and Beltline Virtual Walk – May 26, 2021

- Beltline BIA is new and is still building contacts and relationships. It is made up of roughly 65% professional businesses and 35% storefront/retail/hospitality. There are also 26,000 residents living in the community
- Victoria Park is a very diverse area and the second oldest community in Calgary. Businesses are very diverse and include restaurant, retail, architecture and engineering, beauty health and fitness, tech, oil and gas, insurance and legal, real estate and development, banking and finance, arts and entertainment
- Victoria Park highlighted the underground aquifer that travels down the alley between 10 and 11 Avenues as it may cause impacts to construction as well as businesses if not approached properly
- A major concern of the Beltline are the one-way streets down 11 and 12 avenues. This takes away from the desired pedestrian-oriented environment. Green Line construction could help improve this if intentional; or could make it worse if not planned appropriately
- Both BIAs agree that a robust stakeholder database will help to effectively communicate with businesses, but that hyper-up-to-date data and information is essential
- There are many licensed seats in the area and increasing patio spaces. It would be a major detriment for construction to set back all the progress that has been made in this regard
- A major concern is maintaining the pedestrian flow North-South along 1 Street SW. Many improvements have been made in this area and it is highly used
- Effective construction planning may help to turn 10 Avenue into a Stephen Avenue-type pedestrian/patio type environment. Foot traffic is very important here

- It will be important to maintain access to High Park and the attached parkade. Access to businesses on all streets must be maintained; alleyways could be considered when temporarily street closures are required
- Many more localized/specific details are included in the meeting minutes.

Downtown Virtual Walk – May 31, 2021

- Over 2500 businesses are represented by the BIA. Calgary Downtown Association takes an ecosystems approach, acknowledging the complex social environment and vulnerable population in the area
- Businesses expect to receive up to date construction notices and logistical information. Many business owners who are less tech savvy will call the BIA to understand what is going on. The BIA can help if The City prepares them with accurate information. The BIA also runs an “Ambassadors” program which puts staff on the street to connect with businesses, residents and visitors to the area
- Patio seasons are critically important, and even winter patios may become more of a thing through the Winter Strategy
- Stephen Avenue is a major pedestrian corridor and hotspot for businesses. Stephen Avenue needs to be carefully considered in construction planning
- There are some critical loading zones and access points along 2 Street SW. Some act as a single entry to numerous businesses who depend on their access. This needs to be carefully planned for
- Stephen Avenue Place has just been refinished and will become an important and lively hub for business. After much investment and the impacts of Covid-19, these businesses will be eager to grow profits and remain unimpacted
- Many more localized/specific details are included in the meeting minutes.

4. Research to learn from other Canadian business experiences

Complete and detailed research findings provided the following top themes:

- **Traffic congestion and loss of parking were the biggest pain points for businesses experiencing construction**
 - Businesses were most likely to be frustrated by lane closures, reductions in parking and other measures that make their businesses harder to access.
- **More than anything, business owners wanted clear, sustained and honest communication about how construction will affect their business.**
 - Businesses wanted multiple touchpoints –particularly direct contact with engagement staff –and a clear deadline for when construction will end.
- **Better signage and forums for sharing feedback were viewed as the most helpful things The City can offer.**
 - 10 of 15 Calgary-based businesses interviewed said an online discussion forum would be “very helpful” during construction.
 - 9 of 15 said making signage larger and more prominent near construction sites would be “very helpful.”
- **Support for businesses may be especially important in the wake of COVID-19.**
 - Businesses noted that it may be devastating for those along the Green Line to have to deal with construction right as they emerge from the pandemic.

Business Support Program Objectives

Green Line LRT Project vision and context for the Business Support Program:

A City shaping project that will improve mobility in north and southeast Calgary, that connects people and places, and will enhance the quality of life for all Calgarians.

While we are all focused on the long-term vision and the benefits the Green Line project will deliver on opening day, it is important to understand that the construction of the Green Line LRT is going to be disruptive. We are going to need to be prepared and we are going to need to work together to ensure that our businesses and our communities are well supported to manage the impacts of construction.

Through Council's Notice of Motion, the mandate for Taking Care of Business is: *to help Calgarians prepare for and manage the impacts of Construction of the Green Line LRT*

Focus areas and Goals

There are four overarching areas of focus guiding how the project is approaching impacts to stakeholders as a result of Green Line LRT construction and specifically the development of Green Line LRT's Business Support Program:

1. **Access Planning** - To plan proactively and use knowledge and understanding of stakeholders to reduce the impacts to be managed during construction
2. **Communications** - To deliver a strong communications program, build awareness around the benefits of the Green Line LRT project, provide advance notification for potential construction disruption and the programs and resources available to support impacted business and communities
3. **Community and Stakeholder Relations** - To build and maintain strong relationships with impacted Calgarians, businesses and communities, maintain open channels for communication and ensure timely response and resolution to emerging issues for the duration of the project
4. **Business Support** - To develop and deliver a collection of initiatives that alleviate the impacts of LRT construction and help businesses to prepare for and continue to operate during construction of the Green Line LRT project

Business Support Program Draft Objectives

Access Planning

- Use knowledge and understanding of stakeholder and business operations to plan for access and business continuity and communicate clear expectations for disruptions where necessary
- Plan for safe construction and maintain open dialogue regarding safety concerns

Communications

- Provide high quality, consistent and clear information so that stakeholders know what to expect from construction
- Make information available and accessible; keep it relevant and up to date
- Ensure people know how and where to find the information they need to be informed
- As much as possible, provide accurate construction timelines and communicate delays and changes proactively

Community and Stakeholder Relations

- Maintain regular contact with businesses and communities to ensure there is awareness and understanding of the potential impacts of construction and to help businesses and communities to plan ahead and be prepared
- Be responsive to issues and provide ongoing opportunities to listen, learn and address questions and concerns from impacted businesses and communities
- Maintain records of input received, and demonstrate how input has been considered
- Keep an up to date database of businesses along construction areas

Business Support

- Consult with impacted stakeholders to identify ideas and initiatives that will promote business and encourage Calgarians to support impacted businesses throughout construction
- Collaborate to develop and deliver projects, events, and programs that improve visibility, access and wayfinding and help businesses to better manage disruptions in affected areas