

THE CITY OF EDMONTON
PROJECT AGREEMENT
VALLEY LINE WEST LRT

Schedule 12
Communications and Engagement

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SCHEDULE 12

COMMUNICATIONS AND ENGAGEMENT

ARTICLE 1

COMMUNICATIONS AND ENGAGEMENT CONTEXT

1.1 Purpose of Schedule

This Schedule sets out the City's and Project Co's respective obligations regarding communications and engagement activities during the Construction Period in respect of the Project, including their roles and responsibilities in the design, delivery and evaluation of these activities.

The Valley Line West LRT is an integral component of the City's long-term strategic plan, ConnectEdmonton. It is the most significant city-building initiative undertaken by the City to date, and represents a commitment to delivering high-quality infrastructure for both Edmontonians and the City's funding partners.

Project Co is the City's and its Stakeholders' primary source of information with respect to all matters within Project Co's scope in this Project. Throughout the Construction Period, Project Co is expected to anticipate matters related to the Project which may be of interest or concern to Stakeholders, and to proactively organize and disseminate this information in accordance with this Schedule 12 [*Communications and Engagement*] so as to permit the Parties to perform their obligations hereunder.

1.2 Intent and Outcomes

The delivery of effective communications and engagement supports the overall success of the Project. Project Co will work in collaboration and in partnership with the City to fulfil the requirements contained within this Schedule 12 [*Communications and Engagement*].

The communications and engagement activities described in this Schedule 12 [*Communications and Engagement*] are, *inter alia*, directed to the following:

- (a) ensuring communications and engagement strategies, plans, materials and products reflect and support the City's stated priorities and the spirit of the City's current Strategic Plan and Master Plans;
- (b) building Stakeholders' trust and confidence in the value of capital infrastructure projects and in the City's ability to deliver infrastructure projects;
- (c) building Stakeholders' trust and confidence in the City's transit system, LRT expansion plans, and the safe and reliable operations of the system;
- (d) fostering Stakeholders' awareness and understanding about the value, benefits, impacts, schedule, progress, changes and day-to-day Design and Construction of the Project;
- (e) developing an understanding of and appreciation for Project impacts on Stakeholders and working to minimize and/or mitigate those impacts as much as possible;
- (f) fostering and maintaining positive relationships with Stakeholders;
- (g) engaging with impacted Stakeholders on any substantive changes to the Design and any significant impacts on Construction; and

- (h) ensuring Stakeholders have appropriate opportunities to provide input on significant changes to previous project commitments or other relevant decisions, and that this input is considered and addressed, as appropriate, in a timely and responsible manner.

ARTICLE 2 REQUIREMENTS

2.1 General Obligations

Project Co shall, in performing its obligations and activities pursuant to this Schedule 12 [*Communications and Engagement*] be required to

- (a) conduct communications activities in respect of the Project throughout the Construction Period;
- (b) work in collaboration and in partnership with the City;
- (c) ensure that with regards to all communications activities undertaken by Project Co:
 - (i) the activities shall, if advertised, be described as City activities or, if so determined by the City, in its discretion, as joint City/Project Co activities; and
 - (ii) it is made clear to Stakeholders that such public communications and engagement activities are undertaken for and on behalf of the City.
- (d) ensure all public-facing communications materials are kept up-to-date as Project details evolve or change;
- (e) adhere to current City of Edmonton policies, directives and codes including, but not limited to: Communications Directive (A1446A) and Public Engagement Policy (C593);
- (f) adhere to current City of Edmonton Social Media Guidelines;
- (g) use current City of Edmonton communications and marketing templates as directed by the City;
- (h) adhere to the City of Edmonton's brand in all public-facing communications, including the following:
 - (i) The Valley Line West LRT Design and Construction will be presented as a City of Edmonton project.
 - (ii) All Communications must meet City of Edmonton Visual Identity Standards; in support thereof, the City of Edmonton will provide a visual identity and templates for the Valley Line West LRT Project.
 - (iii) Project Co will use the provided templates and/or visual identity for all Project-related Communications material produced.
 - (iv) Project Co shall use the requirements outlined within the City Public Communications Design Guidelines for signage and hoarding/fencing requirements, in accordance with Section 3.3 of this Schedule 12 [*Communication and Engagement*].

- (i) ensure all video and photography subjects sign the City's model release form;
- (j) adhere to Canadian Press style guidelines;
- (k) provide the City and City Persons with access to the Site pursuant to and in accordance with Section 3.7 of this Agreement for the purposes of communications and engagement activities, including for special events, media events, site tours, Indigenous engagement/site monitoring, and the capturing of photography/video;
- (l) provide the City and City Persons with access to personnel, Project information or other support to enable the City to develop and implement communications, marketing and engagement plans, strategies and activities for the Project;
- (m) be responsible for integrating its Communications Team with Project Co's leadership, its wider technical teams and any other relevant personnel so that the Communications Team is well-informed about the Design and Construction of the Project and is able to effectively meet the requirements of this Schedule 12 [*Communications and Engagement*]; and
- (n) ensure all communications activities are coordinated with the City and aligned with the City's broader communications, marketing and engagement strategies, including those related to city-building, public transit, infrastructure, LRT expansion and renewal, business relations, safety and construction by working in an integrated and collaborative manner with the City.

ARTICLE 3 SCOPE OF WORK FOR COMMUNICATIONS AND ENGAGEMENT

3.1 Communications and Engagement Services - General

For the purposes of this Schedule 12 [*Communications and Engagement*], communications is a strategic approach to developing, implementing and evaluating communications strategies, plans, processes, activities, tools and tactics in order to build mutually beneficial relationships with Stakeholders. This includes, but is not limited to: media relations, Stakeholder Relations, inquiry management, issues management, Crisis Communications, public events, marketing, advertising, social media, photography and graphic design.

Project Co will be required to:

- (a) proactively deliver communications to Stakeholders regarding Project Work in a timely, transparent and effective manner through multiple digital and traditional communications channels;
- (b) establish and maintain relationships with, share information with and seek feedback from Stakeholders to improve awareness of and understanding by Project Co of the impacts on Stakeholders relating to the Design and Construction of the Project, including schedule and progress;
- (c) work with the City in an integrated manner to address Stakeholder concerns and issues related to the Project;
- (d) support the City in its communications, marketing and engagement efforts related to the Project; and

- (e) develop communications strategies, plans, tools, tactics and other work products as required by this Schedule 12 [*Communications and Engagement*]. Those strategies, plans, tools, tactics and work products, which may be amended or updated from time to time, will be submitted to the City for review and acceptance, pursuant to and in accordance with Schedule 2 [*Submittal Review Procedure*]. Once such strategies, plans, tools, tactics and work products have been Accepted by the City in accordance with Schedule 2 [*Submittal Review Procedure*], Project Co shall be responsible for implementing them, and Project Co shall report its progress to the City as required in this Schedule 12 [*Communications and Engagement*], including through the Communications and Engagement Working Group.

3.2 Design and Construction Communications Services

- (a) Project Co and the City will share responsibility for communicating the Project's Design and Construction schedules, progress and milestones. Specifically:
 - (i) subject to Section 3.2(a)(iii), Project Co shall communicate relevant day-to-day information about the Project's schedule, progress and milestones to Stakeholders;
 - (ii) the City shall be responsible for leading communications in respect of major milestones (as determined by the City), with Project Co support; and
 - (iii) the City reserves the right to lead or support communications at its discretion.
- (b) Project Co will be responsible for communicating day-to-day Design and Construction activities and their associated impacts to relevant Stakeholders, including:
 - (i) bridge closures;
 - (ii) lane/road, sidewalk, alley and SUP restrictions or closures for all affected transportation modes (including motorists, cyclists and pedestrians);
 - (iii) trail disruptions for all affected transportation modes;
 - (iv) permanent changes that impact Stakeholders' interactions with Existing Infrastructure;
 - (v) building deconstruction;
 - (vi) salvage opportunities that could be of interest to Stakeholders;
 - (vii) public art removal and storage;
 - (viii) noise, vibration, dust and construction vehicle traffic;
 - (ix) air quality disturbances;
 - (x) work that occurs outside of the hours of 6 a.m. to 6:30 p.m. during weekdays;
 - (xi) work that occurs anytime during weekends or statutory holidays;
 - (xii) tree and vegetation protections, removals, prunings or related work;
 - (xiii) any environmental mitigation measures as required by Schedule 10;

- (xiv) permanent access closures onto private property;
 - (xv) temporary access changes to residential properties, businesses and organizations;
 - (xvi) access onto and use of private property;
 - (xvii) property fence removals/replacements/installations;
 - (xviii) noise attenuation wall installations;
 - (xix) temporary disruption of Utility, City or other government services;
 - (xx) testing and commissioning of the Infrastructure;
 - (xxi) Utility relocations; and
 - (xxii) other similar impacts.
- (c) These communications must:
- (i) be easy to understand, be written in plain language without jargon or spelling errors and be accompanied by images to illustrate impacts when appropriate;
 - (ii) at minimum, accurately describe the activity by outlining who is doing the work, of what the work consists, any associated impacts to Stakeholders, applicable detour or mitigation information, when, where and why the work is happening and the duration of the activity and/or disruption;
 - (iii) be tailored for the audience being targeted and the medium being used to target such audience; and
 - (iv) use multiple digital and print communications channels to effectively target impacted Stakeholders;
 - (A) this work should be in addition to the City Review and Public Notification Period requirements outlined in Schedule 5 [*D&C Performance Requirements*]; and
 - (B) this work should be in addition to leveraging the City's website and/or webpages, in accordance with Section 3.4 of this Schedule 12.
- (d) Project Co is responsible for providing sufficient notice about day-to-day Design and Construction activities and their associated impacts to relevant Stakeholders in advance of the start of each activity. To that end:
- (i) notification requirements for certain activities are described in Section 1-4.2.11 [*City Review and Public Notification Period*] of Schedule 5 [*D&C Performance Requirements*];
 - (A) for each such activity, Project Co will submit a draft construction bulletin to be distributed across multiple channels, and any other draft plans or draft materials necessary to communicate the activity to Stakeholders, as part of the TAR submission package. The bulletin must contain tentative dates and a complete description of roadway, sidewalk, noise, vibration,

dust and other such impacts as would be meaningful to Stakeholders. It must also include detour routing for all relevant transportation modes (including motor vehicles, bicycles, scooters and pedestrians), any transit impacts, any bylaw exemptions, contact information for inquiries, and a full-colour map clearly delineating the area of works and projected impacts; and

(B) if Construction impacts significantly change from the Accepted TAR or initial communications with Stakeholders, additional communications are required to inform impacted Stakeholders of the reason for the change, any planned or ongoing mitigations, an updated duration of the impacts, if applicable, and any other information that would be meaningful to Stakeholders;

(ii) Project Co is also responsible for providing advance notification of the following activities outside of the TAR submission process outlined in Section 1-4.2.11 [City Review and Public Notification Period] of Schedule 5 [D&C Performance Requirements] within the following timelines:

Construction Impact Type	City Review Period of Draft Communications Materials	Public Notification Period
Bridge Closures	20 Business Days	20 Business Days
Property Fence removals/replacements/installations	20 Business Days	20 Business Days
Noise attenuation wall installations	5 Business Days	5 Business Days
Trail disruptions for all affected transportation modes	5 Business Days	5 Business Days
Access to private property	5 Business Days	5 Business Days
Noise, vibration, dust, air quality disturbances	5 Business Days	5 Business Days
Night or weekend work	5 Business Days	5 Business Days
Tree and vegetation protection, removals, prunings or related work	5 Business Days	5 Business Days
Environmental Mitigation Measures	5 Business Days	5 Business Days
Permanent access closures (physical closure)	10 Business Days	10 Business Days
Deconstruction of facilities	5 Business Days	5 Business Days
Public art removal and storage	5 Business Days	5 Business Days
Recoverable items/salvage opportunities that could	5 Business Days	5 Business Days

reasonably be expected to be of interest to Stakeholders		
Temporary disruption of Utility, City or other government services	5 Business Days	5 Business Days
Testing and commissioning activities	5 Business Days	5 Business Days
Utility relocations	5 Business Days	5 Business Days

- (A) for each activity, Project Co will submit a draft construction bulletin to be distributed across multiple channels, and any other draft plans or draft materials necessary to communicate the activity to Stakeholders. This bulletin must contain tentative dates and a complete description of roadway, sidewalk, noise, vibration, dust and other such impacts as would be meaningful to Stakeholders. It must also include detour routing for all relevant transportation modes (including motor vehicles, bicycles, scooters and pedestrians), any transit impacts, any bylaw exemptions, contact information for inquiries, and a full-colour map clearly delineating the area of works and projected impacts; and
- (B) if Construction impacts significantly change from initial communications with Stakeholders, additional communications are required to inform impacted Stakeholders of the reason for the change, any planned or ongoing mitigations, an updated duration of the impacts, if applicable, and any other information that would be meaningful to Stakeholders.

3.3 Construction Signage and Hoarding/Fencing Enhancements

- (a) Project Co will be responsible for designing, constructing, installing, maintaining and updating construction signage, and visual enhancements to hoarding and fencing, including:
 - (i) Project identification signs, in accordance with Section 1-8.1 [*Project Identification Signs*] of Schedule 5 [*D&C Performance Requirements*];
 - (ii) visual enhancements to Project fencing or hoarding in Pedestrian Priority Zones (PPZ) in accordance with this schedule and Section 1-8.3 [*Temporary Barriers and Enclosures*] of Schedule 5 [*D&C Performance Requirements*], provided, however, that:
 - (A) the City may require Project Co to temporarily remove and store portions of the fencing/hoarding enhancements for a determined period of time so the City may use that space for other City initiatives, including special events, marketing or Stakeholder Relations initiatives. Project Co will be

required to reinstall the stored enhancements on the fencing or hoarding once that determined period is over; and

- (B) in cases where the City determines that enhanced fencing or hoarding is not required within a PPZ, the City reserves the right to require Project Co to install enhanced fencing or hoarding in an area of an equivalent size elsewhere along the alignment;
- (iii) wayfinding, multimodal movement and “open for business” signage. Project Co will install this signage where Construction activities impede or obstruct access to businesses or organizations, pedestrian or other multimodal movements before said Construction activities begin.
- (b) Signage and hoarding/fencing enhancements will be in compliance with City Public Communications Design Guidelines, which will be developed by the City and shall be shared with Project Co.:
 - (i) for enhanced fencing, Project Co will use mesh banners and lightweight Coroplast signs or another similar material agreed by the City; and
 - (ii) for hoarding structures, Project Co will use vinyl printed to MDO plywood or other similar materials agreed by the City, to be installed and built into a frame around the Construction Site. An anti-graffiti coating should also be applied to these structures.
- (c) Signage and hoarding/fencing enhancements shall be well-maintained and kept free from graffiti, vandalism or other signs of damage. Any vandalism or other damage shall be repaired within 5 Business Days of occurrence at Project Co’s cost.
- (d) Project Co will inspect the signage, hoarding and fencing not less than monthly to ensure they are well-maintained and free of damage and that any communications content on those items is up-to-date.

3.4 Project Website

- (a) The City will establish and retain ownership of the website and/or web pages for the Project and will be responsible for uploading content.
- (b) Project Co will support the City’s project website and/or web pages by:
 - (i) providing the City with timely, thorough and easy-to-understand Project information, including information about Design and Construction activities, schedules, Project status, milestones, and Project Co communications activities and materials; and
 - (ii) leveraging the City’s project website as a tool through which the requirements of Section 3.2 [*Design and Construction Communications Services*] can be facilitated.
- (c) None of Project Co or any Project Co Person will post any information relating to the Project, the Project Agreement or the City on its websites and or web pages without the prior review, acceptance and consent of the City.

3.5 Social Media

- (a) The City will use its own social media channels to communicate with Stakeholders regarding the overall Project or other information it deems appropriate.
- (b) Project Co will:
 - (i) establish and maintain its own social media accounts to communicate the day-to-day Design and Construction of the Project on the following platforms: Facebook, Twitter and Instagram, or other platforms as directed by the City;
 - (ii) develop, submit and implement a social media strategy for the Construction Period;
 - (iii) using the current City social media plan template, develop, submit and share timely and relevant proactive posts through appropriate social media channels,
 - (iv) respond to inquiries and feedback related to the day-to-day Design and Construction of the Project that are received through Project Co's social media accounts as soon as possible and no later than 24 hours after they are received. Project Co will use the social media strategy as its guide for these responses and whenever possible within the established timelines, will use City-accepted messaging;
 - (v) identify for the City any inquiries or feedback unrelated to the day-to-day Design and Construction of the Project as soon as possible and no later than 24 hours after they are received;
 - (vi) identify for the City as soon as possible any issues related to the overall Project that are identified by third parties and directed to Project Co's social media platforms;
 - (vii) post City messaging in response to inquiries or feedback identified in 3.5(b)(v) or (vi) as soon as possible and no later than 24 hours after they are received; and
 - (viii) support the City's communications efforts by sharing City-developed Project-related social media posts on Project Co's social media channels as directed by the City.
- (c) Aside from the social media accounts that Project Co establishes for the purposes of meeting the requirements of this Schedule 12 [*Communications and Engagement*], none of Project Co or any Project Co Person will share any posts relating to the Project, the Project Agreement or the City on their own social media accounts or websites without the prior review, acceptance and consent of the City.

3.6 Media Relations

- (a) The City will lead media relations activities and act as the primary media contact for the Project.
- (b) Project Co will support the City with media relations activities for the Project, including by:
 - (i) immediately redirecting back to the City any media inquiries or interview requests that Project Co receives;

- (ii) ensuring that all Project Co Persons and any subcontractors are trained to direct any media requests or inquiries to the City and are in compliance with this training;
- (iii) providing the City with timely, thorough and easy-to-understand Project information and communications materials necessary to support media relations activities for the Project. To that end:
 - (A) for proactive media relations activities, Project Co will be required to provide the above-mentioned support to the City no later than 5 Business Days following written request by the City, unless otherwise directed by the City.
 - (B) for reactive media relations activities, including media inquiries, Project Co will be required to provide the above-mentioned support to the City as soon as possible and within the same Business Day, unless otherwise directed by the City.
- (iv) providing the necessary Project Co Persons to support media relations activities for the Project;
- (v) responding to media inquiries only as directed by the City. In these cases, Project Co will work with the City to develop an appropriate response to the inquiry;
- (vi) ensuring the availability at all times of a media-trained Project Co spokesperson who may be called upon to participate in media interviews and/or media events as directed by the City. To that end:
 - (A) Project Co spokespeople must be able to speak knowledgeably about the subject matter being discussed in said interviews and/or events, and be able to speak to the media in plain language; and
 - (B) All Project Co spokespeople must undergo media training from an Alberta-based independent media relations expert or consultant, with more than 10 years of experience in journalism and/or media relations, who must be approved by the City prior to engaging the expert or consultant.
- (c) None of Project Co or any Project Co Person will share any media release, public announcement or any other public disclosure to the media relating to the Project, the Project Agreement or the City without the prior review and consent of the City.

3.7 Special Events

- (a) The City will lead special events for the Project, including tours of the Site and milestone celebrations with Stakeholders and/or the media.
- (b) Project Co will support the City with special events for the Project, including by:
 - (i) collaborating with the City to develop, plan and coordinate the events;
 - (ii) proactively identifying milestones for the Project with sufficient notice for the City to effectively execute events in support of those milestones. Project Co will

provide the City with at least 20 Business Days' notice prior to the date the milestone will be achieved, unless otherwise required by the City;

- (iii) providing relevant and up-to-date content and Project information to support event planning and execution;
- (iv) providing access to Communications Team staff, media spokesperson(s) and/or technical experts, as required by the City, in support of the planning and execution of special events;
- (v) providing the City and special event invitees with Site access in accordance with the Agreement; and
- (vi) preparing the Site and any on-site Project Co and/or City personnel to accommodate special events, in terms of safety precautions, accessibility, aesthetics, event logistics and other considerations as directed by the City.

3.8 Inquiry Management

- (a) The City and Project Co will share responsibility for inquiry management for the Project.
- (b) The City will act as the main point of contact for inquiries from Stakeholders about the overall Project and:
 - (i) manage inquiries that are received through 311, the City's LRT Projects Information Centre email and phone number, and through Project Co; and
 - (ii) direct any inquiries related to day-to-day Design and Construction to Project Co for response.
- (c) Project Co will act as the main point of contact for Project inquiries from Stakeholders related to day-to-day Design and Construction and, in connection therewith, Project Co shall:
 - (i) receive, manage, document and track Stakeholder inquiries in respect of the day-to-day Design and Construction of the Project. Project Co will respond to these inquiries within two Business Days and to facilitate same, Project Co will establish a local phone number (separate from the 24-hour hotline referred to in Section 7.3.4 [*Emergency Measures*] of Schedule 4 [*Design and Construction Protocols*]) and email address for the purposes of receiving and managing Stakeholder inquiries. The phone line must have a voicemail and include an automated message indicating hours of operation and expectations for response times and the email address will include an auto-reply message indicating response times;
 - (ii) respond to inquiries using City-accepted messaging whenever possible;
 - (iii) receive, manage, document and respond to Stakeholder inquiries of an emergency nature received through the 24-hour hotline referred to in Section 7.3.4 [*Emergency Measures*] of Schedule 4 [*Design and Construction Protocols*]. Project Co is also required to receive, manage, document and respond to Stakeholder inquiries that are mistakenly received by the 24-hour hotline when they are not an emergency. Those inquiries shall be managed as day-to-day Design and Construction inquiries;

- (iv) copy the City on all responses to Stakeholder inquiries;
- (v) direct any inquiries unrelated to the day-to-day Design and Construction of the Project to the City within the same Business Day;
- (vi) establish and maintain an Inquiry Register that will document and track all inquiries received and all responses provided by Project Co. The register shall be compatible with current City inquiry tracking systems; and
- (vii) support the City in the development of up-to-date Project Design and Construction information/scripts for City of Edmonton 311 operators' use, so as to enable them to appropriately respond to basic Project-related inquiries.

3.9 Crisis Communications

For purposes of this Schedule 12 [*Communications and Engagement*], Crisis Communications is defined as the communications response to a significant threat to the Project such as major safety failure or breach, loss of life, natural disaster, terrorist threat or attack, pandemic, or other such unexpected or unanticipated emergency. Responsibilities for Crisis Communications shall be allocated between Project Co and the City as set out following.

- (a) The City will lead Crisis Communications relating to the Project.
- (b) The City will be responsible for developing a Crisis Communications plan for the Project which plan shall be shared with Project Co.
- (c) Project Co will support the City's Crisis Communications activities by providing timely, relevant and accurate Project information, personnel and technical experts as requested by the City, as well as Site access in accordance with this Agreement.
- (d) Project Co will respond to all Crisis Communications requests from the City as soon as possible within the same Business Day, unless otherwise directed by the City.
- (e) Project Co's Communications Manager and Communications Team, as well as the Construction Manager, the Integration Manager and the Safety Manager, will participate in the development and execution of a City-led Crisis Communications simulation. The City will provide Project Co with 20 Business Days' notice of the simulation.

3.10 Issues Management

For purposes of this Schedule 12 [*Communications and Engagement*], Issues Management is defined as the practice of anticipating, identifying, tracking and managing potential problems, issues or trends that could reasonably be expected to adversely affect the Project's reputation and/or the City's brand or reputation, including those that present a significant risk to public safety or well-being, have a significant likelihood of news media attention or create the potential for senior members of City Administration or City Council to receive complaints. Responsibilities for Issues Management shall be allocated between Project Co and the City as set out following.

- (a) The City will lead and direct issues management relating to the Project.
- (b) Project Co will support the City with issues management as it relates to the day-to-day Design and Construction of the Project by:
 - (i) anticipating, identifying and informing the City of issues and trends in a timely and relevant manner;

- (ii) working with the City to understand and respond to issues and develop reasonable mitigations. To that end:
 - (A) the City may direct Project Co to propose possible mitigations for an issue. These mitigations will be assessed by the City to determine acceptability before they are enacted; and
 - (B) in circumstances where an issue is of an emergency nature and mitigations must take place immediately or risk worsening the issue, Project Co may take reasonable steps to mitigate the issue immediately; and
- (iii) providing timely, relevant and accurate Project information and/or personnel and technical experts as requested by the City for the purposes of understanding, addressing and mitigating issues; establishing and maintaining an Issues Register for tracking, addressing, and mitigating day-to-day Design and Construction issues related to the Project.

3.11 Stakeholder Relations

For the purposes of this Schedule 12 [*Communications and Engagement*], Stakeholder Relations is defined as a set of processes and activities used by the City and Project Co to establish and maintain good relationships with Stakeholders for the Project, to share and seek information, understand impacts and develop possible mitigations. Responsibilities for Stakeholder Relations shall be allocated between Project Co and the City as set out following.

- (a) The City and Project Co will share responsibility for Stakeholder Relations for the Stakeholders that are identified in Appendix 12B of this Schedule 12 [*Communications and Engagement*].
- (b) The City will be responsible for Stakeholder Relations in respect of the overall Project, with Project Co support. In that regard:
 - (i) the City has established relationships with Stakeholders for the Project, and will maintain these relationships and seek to establish relationships with any new Stakeholders; and
 - (ii) the City will provide Project Co with a Stakeholder map after the Effective Date to support the development of Project Co's, Stakeholder Relations program. The City will update the map on a regular basis as new Stakeholders are added or removed.
- (c) Project Co will be responsible for Stakeholder Relations as it relates to day-to-day Design and Construction activities by:
 - (i) developing and implementing a day-to-day Design and Construction Stakeholder Relations program;
 - (ii) establishing and maintaining a comprehensive Stakeholder register to document interactions, commitments and communications with Stakeholders;
 - (iii) establishing and maintaining positive and productive relationships with Stakeholders in relation to the day-to-day Design and Construction of the Project;
 - (iv) alerting the City to any new or previously unidentified Stakeholders it discovers;

- (v) maintaining regular contact with Stakeholders affected by day-to-day Design and Construction activities;
- (vi) anticipating and identifying to the City as soon as possible any potential Stakeholder Relations issues that have the potential to adversely affect the City or the Project;
- (vii) working in an integrated fashion with Project Co leadership and technical teams as appropriate and with the City to understand, anticipate and respond to Stakeholder concerns, and develop reasonable mitigations;
- (viii) providing timely, relevant and accurate Project information and/or personnel and technical experts as requested by the City for the purposes of understanding, addressing and mitigating Stakeholder Relations issues;
- (ix) notifying the City of scheduled meetings with Stakeholders with sufficient notice so the City can participate at its discretion, and, to ensure consistent messaging and overall strategic alignment;
- (x) establishing and maintaining a local site office for the purposes of holding scheduled meetings with Stakeholders. The office must be located along the alignment, kept clean and presentable, and be easily accessible for Stakeholders;
- (xi) preparing and/or providing content for materials including display boards, information session discussion guides and fact sheets regarding day-to-day Design and Construction activities for the Project;
- (xii) participating in Stakeholder Relations activities such as public events or meetings as directed by the City and, specifically, with respect thereto:
 - (A) Project Co staff will support and attend City-led public events for the Project during the Construction Period;
 - (B) Project Co staff will support and attend City-led Stakeholder meetings during the Construction Period;
 - (C) Project Co staff at these events and meetings will include:
 - (1) Communications Team personnel, including Stakeholder Relations staff, with a broad knowledge of the Project; and
 - (2) technical personnel who are credible, knowledgeable about the Project and its impacts, able to communicate that knowledge to a lay-audience, and sensitive and responsive to the stakeholders' concerns;
 - (D) providing timely, relevant and accurate Project information, personnel and/or technical experts, and access to the Site in accordance with this Agreement; and
 - (E) complying with the Stakeholder requirements outlined in Section 1-3.1 [*Construction Constraints*] of Schedule 5 [*D&C Performance Requirements*].

- (d) The City reserves the right to lead or support any Stakeholder Relations activities at its discretion.

3.12 Citizen Working Groups

The City of Edmonton has established five Citizen Working Groups along the Valley Line West LRT alignment. Citizen Working Groups allow the City and members to share information about the Project's schedules, progress, milestones, activities and impacts throughout the life cycle of the Project. The groups each meet several times a year and are expected to meet with increased frequency once Design and Construction of the Project begins. Responsibilities for Citizen Working Groups shall be allocated between Project Co and the City as set out following

- (a) The City will maintain and lead relationships with the five Citizen Working Groups during the Construction Period.
- (b) Project Co will support the City in relation to the Citizen Working Groups by:
 - (i) attending all meetings unless otherwise directed by the City. Project Co's representative(s) will be responsible for providing Project updates at Citizen Working Group meetings and should be credible, knowledgeable about the Project and its impacts, be able to communicate that knowledge to a lay-audience, and be sensitive and responsive to the groups' concerns;
 - (ii) providing timely, relevant and accurate Project information and/or, personnel and technical experts as requested by the City; and
 - (iii) contributing to City materials for the Citizen Working Groups, including presentations and fact sheets.

3.13 Public Engagement

The City values Public Engagement, which is defined as a set of processes and activities that allow for Stakeholders to provide input to support decision-making. The Project has undergone extensive Public Engagement to date, but further Public Engagement may be required during the Construction Period if the Design and/or Construction elements substantively differ from prior understanding of Project scope or expectations. Responsibilities for Public Engagement shall be allocated between Project Co and the City as set out following

- (a) The City will lead all Public Engagement for the Project.
- (b) Project Co will support the City's Public Engagement efforts by:
 - (i) identifying to the City any Design changes that arise through the detailed Design process that may substantively deviate from previous conceptual and preliminary Designs and/or may substantively adversely impact Stakeholders. These changes should be identified for the City as soon as possible and no later than 150 days prior to the change being implemented in order for the City to effectively implement any Public Engagement processes and activities for the Project;
 - (ii) identifying to the City any Construction means and methods that deviate from requirements of the Project Agreement and will result in material unexpected impacts to Stakeholders. These means and methods, and any associated impacts, should be identified for the City as soon as possible and no later than 150 days prior to the Construction means and methods being implemented in

order for the City to effectively implement any Public Engagement process and activities for the Project;

- (iii) supporting the development and implementation of the City's Public Engagement plans for the Project, including:
 - (A) providing timely, relevant and accurate Project information, content and/or materials;
 - (B) attending Public Engagement events and providing both Communications Team staff, and technical personnel who are credible, knowledgeable about the Project and its impacts, and sensitive and responsive to Stakeholder concerns; and
 - (C) participating in any Public Engagement activities related to the Project, as directed by the City.
- (iv) reviewing and responding to public input received through Public Engagement processes. Where the Public Engagement process is triggered by Project Co-initiated Design and/or Construction scope, public feedback and associated possible mitigations as provided by Project Co will be submitted to the City to determine acceptability.

3.14 Indigenous Engagement

- (a) The City will lead engagement and Stakeholder Relations with Indigenous communities for the Project, which will include harvesting, ceremonies and site monitoring at Lewis Farms with Indigenous Stakeholders, including those identified in Appendix 12A.
- (b) Project Co will support the City's engagement and relationships with Indigenous communities for the Project, including by:
 - (i) supporting the implementation of the City's Indigenous engagement and Stakeholder Relations program for the Project, including:
 - (A) providing timely, relevant and accurate Project information, content and materials as required by the City;
 - (B) providing access to Communications Team staff, media spokesperson(s) or technical experts, as required by the City;
 - (C) participating in Indigenous engagement and Stakeholder Relations activities, as directed by the City, and providing Project Persons, who are credible, knowledgeable about the Project and sensitive and responsive to Stakeholder concerns; and
 - (D) providing the City and special event invitees with Site access in accordance with the Agreement;
 - (ii) supporting the City's efforts by providing information and working in alignment with both Federal and Provincial jurisdictions on the Duty to Consult and/or Accommodate requirements, as well as the City's Memorandum of Understanding with the Enoch Cree Nation, Memorandum of Cooperation and Dialogue with the Confederacy of Treaty Six First Nations, and Memorandum of Shared Recognition and Cooperation with the Métis Nation of Alberta.

3.15 Evaluate and Incorporate

The communications strategies and plans identified in this Schedule 12 [*Communications and Engagement*] are living documents and must be flexible to change in response to events and lessons learned during the Construction Period. To that end, Project Co shall:

- (a) evaluate the effectiveness of all communications strategies and plans it leads; the effectiveness of the tools and tactics it employs, and identify opportunities to improve services and/or mitigate issues. To that end:
 - (i) evaluations should outline any lessons learned; and make recommendations about any adjustments Project Co will make to its strategic approach, and/or tools and tactics, as it updates its strategies and plans;
 - (ii) evaluations for any annual or multi-year strategies will be delivered to the City at least once a year; and
 - (iii) evaluations for any other strategies or plans will be completed and delivered to the City within 30 days of completing the work for said strategy/plan, unless otherwise directed by the City.
- (b) develop and implement a Research and Evaluation Plan, to support the development and evaluation of all communications strategies and plans. The research plan shall be updated annually, at a minimum. Research should be conducted using at least three research methods and use current City research standards and best practices in accordance with the requirements of Appendix 12C;
- (c) integrate research results into the evaluation and development of all communications plans and strategies;
- (d) assess City recommendations and make reasonable adjustments to strategic approaches, tools and/or tactics within each plan or strategy;
- (e) changes requested by the City to accepted communications strategies and plans which involve additional costs are subject to Schedule 13 [*Changes*]; and
- (f) integrate any evaluation outcomes into any new strategies or plans, and in any updates to ongoing strategies and plans.

3.16 Technological Improvements

Project Co shall monitor and keep up-to-date on all technological developments and improvements in the communications field which may provide a value-add or enhance Project Co's performance of its obligations under this Schedule 12 [*Communications and Engagement*].

Project Co may submit any such proposed development or improvement as a Change pursuant to, and subject to, Schedule 13 [*Changes*]. The City may periodically, at its discretion, require that Project Co investigate and/or incorporate certain technological improvements that the City has determined will have a beneficial effect on communications and public engagement activities pursuant to Schedule 13 [*Changes*].

ARTICLE 4 COMMUNICATIONS TEAM

4.1 Communications Team Requirements

Project Co will:

- (a) establish an integrated communications team (the “**Communications Team**”), including defining the roles and responsibilities for each team member and any third party that is anticipated or required to provide any aspect of the Project Co’s responsibilities in this Schedule 12 [*Communications and Engagement*];
- (b) provide a Communications Manager, in accordance with the requirements outlined in Appendix 26A, Schedule 26 [*Representatives and Key Individuals*] who will lead the Communications Team and act as a direct liaison between the Communications Team and the City;
- (c) ensure sufficient personnel levels to fulfill Project Co’s obligations in this Schedule 12 [*Communications and Engagement*], including a communications lead with a minimum of 2 years of experience in construction communications and a Stakeholder Relations lead with a minimum of 5 years of experience in Stakeholder Relations;
- (d) provide sufficient personnel experienced in the following, as appropriate to their roles including:
 - (i) experience in developing, implementing and evaluating communications strategies and plans;
 - (ii) experience in providing communications support to construction projects;
 - (iii) strong verbal and written communication skills;
 - (iv) knowledge and awareness of existing and emerging communications tools and appropriate application;
 - (v) experience in developing and producing communications materials, including construction bulletins, media releases, advertising; signage; project mailouts; displays and information booths; display boards; fact-sheets; and promotional merchandise;
 - (vi) experience in managing social media and other digital platforms;
 - (vii) experience in graphic design;
 - (viii) experience in responding to verbal and written project inquiries;
 - (ix) experience in conducting research to inform the development of and effectively evaluate communications plans, including surveys, focus groups and one-on-one interviews;
 - (x) experience in Stakeholder Relations;
 - (xi) holding a foundations certificate of completion from IAP2;

- (xii) experience in facilitation, and in planning and delivering meetings and workshops; and
- (xiii) proficiency in using Google Mail, Google Calendar, and Google Docs.
- (e) minimize undue personnel changes and turn-over; and
- (f) ensure all personnel members will be present in Edmonton either on a full-time basis or at such times and for such durations as are necessary to fully carry out their respective roles and obligations.

4.2 Communications and Engagement Working Group

The City will establish and lead a Communications and Engagement Working Group between the City and Project Co not less than 20 Business Days after the Effective Date, which will be active throughout the Construction Period.

The Communications and Engagement Working Group will provide a formal forum for the Parties to meet and discuss all matters relating to planning and implementing communications and engagement activities during the Construction Period, including day-to-day Design and Construction activities, their progress and their impacts on Stakeholders.

- (a) The Communications and Engagement Working Group meeting:
 - (i) will provide a venue for:
 - (A) reporting by Project Co on the Project schedule, progress, upcoming milestones, and recent and upcoming day-to-day Design and Construction, and communications activities;
 - (B) debriefing on the effectiveness of recent communications and Stakeholder Relations activities;
 - (C) identifying anticipated Project communications needs, upcoming milestones and strategies to meet those needs;
 - (D) collaborating on the development of communications and engagement strategies, plans and materials; and
 - (E) reviewing and discussing the Stakeholder Register, Issues Register and Inquiry Register to identify challenges, opportunities and recommend possible communications approaches.
 - (ii) will be comprised of:
 - (A) City communications representatives;
 - (B) Project Co's Communications Manager;
 - (C) other members of Project Co's Communications Team; and
 - (D) such other persons as the Parties may agree from time to time. Any additional persons must be submitted to the City for consideration within 5 Business Days of the meeting;

- (iii) must be attended by the Design Manager, the Construction Manager and the Integration Manager at least once a month, or as otherwise agreed by the City, so as to ensure that activities across different Project committees are integrated and aligned;
 - (iv) will be chaired by a representative of the City unless otherwise directed by the City;
 - (v) will use an agenda provided by the City unless otherwise directed by the City. The City will circulate the agenda to the Communications and Engagement Working Group within 5 Business Days of the meeting;
 - (vi) will be minuted by the City unless otherwise directed by the City. The City will circulate minutes to the Communications and Engagement Working Group within 5 Business Days of the meeting;
 - (vii) will be held at least once every two weeks after it is convened until the end of the Construction Period at a location provided by the City and from time to time by Project Co as necessary; and
 - (viii) in an emergency, or as otherwise deemed necessary, a meeting may be called at any time on such notice as may be reasonable in the circumstances.
- (b) If City communications representatives or Project Co's Communications Manager requests an additional meeting, the Parties will act reasonably in accommodating this request. During high activity periods of the Project Work, the City may require the frequency of meetings of the Communications and Engagement Working Group to be increased to ensure effective alignment.
- (c) To support the Communications and Engagement Working Group, Project Co:
- (i) may make recommendations to the City on all matters relating to the communications activities described in this Schedule 12 [*Communications and Engagement*], which the City may accept or reject;
 - (ii) will deliver the following to the City's Communications and Engagement Working Group representative(s) not less than 3 Business Days prior to each meeting of the group:
 - (A) a summary of completed, ongoing and planned communications activities;
 - (B) a summary of progress and performance on the implementation of any applicable Design and Construction communications strategies and plans;
 - (C) a 90-day look-ahead schedule of Design and Construction activities and all communications activities;
 - (D) the Stakeholder Register, Issues Register, Inquiry Tracking Register, and a qualitative and quantitative summary of activities, issues and trends contained therein;
 - (E) without altering or limiting the City's review and approval rights, including pursuant to Schedule 2 [*Submittal Review Procedure*], drafts of updated

Communications strategies and plans, if any, for consideration, discussion and comment by the group; and

(F) other plans, strategies, materials, evaluations or reports for consideration, discussion and comment by the Communications and Engagement Working Group, as reasonably requested by the City or Project Co.

(iii) in circumstances where a meeting is convened with less than 5 Business Days' notice, Project Co will not be required to deliver the foregoing materials in respect of such meeting.

ARTICLE 5 DELIVERABLES

5.1 Deliverables

Project Co's deliverables to the City in respect of the communication and engagement activities and the obligations described in this Schedule 12 [*Communications and Engagement*] include the following:

- (a) an Overall Communications Strategy that explains Project Co's overall strategic approach to meeting its obligations in this Schedule 12 [*Communications and Engagement*] for the Construction Period which will include at least the following elements:
 - (i) a description of the strategic imperative for the development of the strategy;
 - (ii) situational and background analysis for the strategy, including strategic alignment with the City, strategic foresight, SWOT (strengths, weaknesses, opportunities, threats) and communications risk analysis;
 - (iii) identification and brief description of key Project activities and milestones for the Construction Period;
 - (iv) a comprehensive narrative describing the overall strategic approach to executing this Schedule 12 [*Communications and Engagement*] for the Construction Period, including Project Co's strategic positioning and how it will align this approach with the City;
 - (v) an organizational chart and a comprehensive narrative of Project Co's Communications Team, their roles and responsibilities, how they will work together, and how they will effectively integrate with Project Co leadership and technical teams in order to meet the obligations in this Schedule 12 [*Communications and Engagement*] for the Construction Period;
 - (vi) goal(s) for the Construction Period;
 - (vii) identification and segmentation of the internal (City) and external audiences;
 - (viii) message platform and key messages for the Construction Period, segmented by audience;
 - (ix) objectives for the Construction Period that are specific, measurable, attainable, realistic and time-specific;

- (x) identification of communications tools and tactics to be used for the Construction Period, with a narrative that explains, how, why and when they will be used; and
- (xi) methods for evaluating the effectiveness of the strategy that include quantitative and qualitative research, and are tied to the plan's goal(s) and objectives;

Project Co will provide a draft of the first Overall Communications Strategy to the City no later than 40 Business Days after the Effective Date with a final version of the strategy submitted no later than 60 Business Days after the Effective Date. Project Co will submit updated versions of this strategy to the City annually, at a minimum, in response to developments with its communications and engagement activities, the Project and in Edmonton.

- (b) an Annual Design & Construction Communications Plan, that focuses on key activities for the year and that details Project Co's strategic approach to meeting its obligations in this Schedule 12 *[Communications and Engagement]* each year. The plan shall be developed using the City's current template for such plan, which will include at least the following elements:
 - (i) a description of the strategic imperative for the development of the plan;
 - (ii) situational and background analysis, including SWOT (strengths, weaknesses, opportunities, threats) and communications risk analysis;
 - (iii) description of the plan's strategic alignment with the Overall Communications Strategy and any other related plans or strategies;
 - (iv) a comprehensive narrative describing Project Co's strategic approach;
 - (v) identification of the goal(s);
 - (vi) identification and segmentation of external and internal (City) audiences who will have an interest in or be impacted by design and construction activities;
 - (vii) the message platform and key messages, segmented by audiences;
 - (viii) objectives that are specific, measurable, attainable, realistic and time-specific;
 - (ix) a work plan, including identification of communications tools and tactics, associated timelines for implementation; and personnel responsible for the implementation of the work plan; and
 - (x) methods for evaluating the effectiveness of the plan that include quantitative and qualitative research, and are tied to the plan's goal(s) and objectives.

Project Co will provide a draft of the first Annual Design & Construction Communications Plan to the City no later than 60 Business Days after the Effective Date, with a final version of the first plan submitted no later than 100 Business Days after the Effective Date. Project Co will submit updated versions of the plan to the City annually, at a minimum.

- (c) other communications plans for specific Project issues or needs related to design and construction, as appropriate, which will include at least the same elements and use the same template as the Annual Design & Construction Communications Plan. Project Co will develop communications plans to support the following anticipated issues and needs:
- (i) effective communications with major Stakeholders including: West Edmonton Mall and its businesses, staff and patrons; the Misericordia Hospital and its staff, patients and visitors; MacEwan University and its staff, students and other users; and NorQuest College and its staff, students and other users;
 - (ii) effective communications with festivals and events, and their vendors, volunteers, staff, patrons and other users;
 - (iii) major Construction activities with impacts that involve the full closure of a bridge, roadway or other major impact to existing Infrastructure and/or that have a duration of 20 Business Days or more, unless otherwise directed by the City;
 - (iv) tree and vegetation impacts in Glenora, including the development of a detailed map depicting trees that are anticipated for removal or preservation;
 - (v) construction vibrations;
 - (vi) access closures;
 - (vii) testing and commissioning; and
 - (viii) Utility relocations.

Project Co will submit these plans in compliance with the notification requirements outlined in Section 3.2 (d) of this Schedule 12 [*Communications and Engagement*] when applicable. Otherwise, Project Co will provide a draft plan and submit a final plan to the City, with a draft plan to be delivered 30 Business Days prior to the start of any Project activity supported by the plan and a final plan to be delivered 20 Business Days prior to the start of any Project activity supported by the plan, unless otherwise agreed to by the City.

- (d) Project Co will be expected to develop and implement further communications plans throughout the Construction Period in response to emerging issues or needs as they relate to day-to-day Design and Construction, which will include at least the same elements and use the same template as the Annual Design & Construction Communications Plan. These emerging issues or needs can be identified through the Overall Communications Strategy, Annual Design & Construction Communications Plan, the Issues Register, by Project Co or by the City.
- (e) a Social Media Strategy for the Construction Period which will include at minimum the following elements:
- (i) a description of the strategic imperative for the development of the strategy;
 - (ii) a situational and background analysis, including SWOT (strengths, weaknesses, opportunities and threats) and communications risk analysis;
 - (iii) a comprehensive narrative of Project Co's strategic approach to social media, including best practices for each of its social media channels; how graphics, images, videos and other non-text elements will be incorporated; a rationale for

Project's Co's tone and voice on those channels; and a description of how this strategy will integrate with the Overall Communications Strategy, Annual Design & Construction Communications Plans and any other applicable plans;

- (iv) identification of the goal(s);
- (v) a message platform and key messages to support proactive posts and responses to common questions and concerns from Stakeholders;
- (vi) identification and segmentation of audiences and how they will be targeted and leveraged on social media;
- (vii) 12-month content calendar which broadly maps out Project Co's strategic approach to social media across the year based on Project progress, schedules, milestones and activities. The calendar should also identify annual themes, observances, holidays and other relevant content opportunities;
- (viii) objectives that are specific, measurable, attainable realistic and time-specific; and
- (ix) methods for evaluating and measuring the effectiveness of the strategy and engagement on Project Co's social media channels.

Project Co will provide a draft of the first Social Media Strategy to the City no later than 80 Business Days after the Effective Date, with a final version of the strategy submitted no later than 100 Business Days after the Effective Date. Project Co will submit updated versions of the strategy to the City annually, at a minimum. Project Co will also submit updated versions of the 12-month content calendar quarterly to the City, with a more detailed description of social media activities for the next three months.

- (f) social media plans for proactive posts, submitted using current City templates.
- (g) a message platform, key messages and Q&A document, submitted to the City no later than 80 Business Days after the Effective Date, to support Project Co and City communications activities for the purposes of this Schedule 12 [*Communications and Engagement*], and ensure consistency, effective alignment and integration between the Parties. The document will draw from plans and strategies in this Schedule 12 [*Communications and Engagement*], and be updated regularly based on Stakeholder inquiries, concerns or issues, or other emerging needs. The document will be submitted for City review at minimum quarterly and Project Co will submit updated versions of the plan to the City annually, at a minimum.
- (h) a Stakeholder Relations Strategy for the Construction Period which shall include the following elements:
 - (i) a description of the strategic imperative for the development of the strategy;
 - (ii) a situational and background analysis, including SWOT (strengths, weaknesses, opportunities and threats) and communications risk analysis;

- (iii) a strategic approach to Project Co's Stakeholder relations program which explains how Project Co will effectively build and maintain positive and productive relationships with Stakeholders. The approach should provide a comprehensive narrative that, at minimum:
 - (A) recommends Stakeholder relations tools and tactics to be used for the Construction Period and explain why, how and when they'll be used;
 - (B) describes how this strategy will be integrated into the Overall Communications Strategy, Annual Communications Plans and any other applicable plans;
 - (C) describes how Project Co will anticipate and identify Stakeholder issues and alert the City to those issues;
 - (D) describes how Project Co will work with the City to respond to these issues and develop reasonable mitigation strategies; and
 - (E) proposes reasonable proactive mitigation strategies for any issues Project Co can anticipate;
- (iv) identification of the goal(s);
- (v) identification of objectives that are specific, measurable, attainable, realistic and time-specific;
- (vi) a 12-month work plan, to be updated and provided to the City at minimum quarterly, that outlines Project Co's Stakeholder relations activities for the year, including identification of tools and tactics, associated timelines for implementation, and personnel responsible for the implementation of the work plan; and
- (vii) methods for evaluating and measuring the effectiveness of the strategy that include quantitative and qualitative research, and are tied to the strategy's goal(s) and objectives.

Project Co will provide a draft of the first Stakeholder Relations Strategy to the City no later than 60 Business Days after the Effective Date, with a final version of the strategy submitted no later than 80 Business Days after the Effective Date. Project Co will submit updated versions of the plan to the City annually, at a minimum.

- (i) a Research and Evaluation Plan for the Construction Period to support the evaluation of the success and effectiveness of Communications Plans and Strategies which will include at least the following elements:
 - (i) a description of the strategic imperative for the development of the plan;
 - (ii) a description of all plans and strategies the Research and Evaluation Plan will support;
 - (iii) a comprehensive narrative that explains the strategic approach to research design and how data will be collected, analyzed and reported;
 - (iv) identification of the goal(s);

- (v) objectives that are specific, measurable, attainable, realistic and time-specific;
- (vi) a workplan that identifies the research methods and tools Project Co will employ in implementing its research design and timelines for its use; and
- (vii) methods that are in alignment with current City of Edmonton research methods and practices.

Project Co will provide a draft of the first Research and Evaluation Plan to the City no later than 60 Business Days after the Effective Date, with a final version of the strategy to be submitted no later than 80 Business Days after the Effective Date.

(j) a Stakeholder Register which will:

- (i) at minimum, document the following details for each Stakeholder interaction: who was involved in the interaction, when the interaction took place, the method of interaction, what was discussed, and any outcomes or commitments that resulted from the interaction; and
- (ii) be kept up-to-date and provided to the City on a bi-weekly basis through the Communications and Engagement Working Group and, otherwise, upon request.

The Stakeholder Register will be developed and implemented within 30 Business Days of the Effective Date and will be transferred to the City upon Construction Completion.

(k) an Issues Register which will:

- (i) at minimum, document the following details for each potential, emergent or ongoing issue: a description of the issue, who is involved, when it has or will emerge, mitigations and the status of those mitigations; and
- (ii) be kept up-to-date and provided to the City on a bi-weekly basis through the Communications and Engagement Working Group and, otherwise, upon request.

The Issues Register will be developed and implemented within 20 Business Days of the Effective Date and will be transferred to the City upon Construction Completion.

(l) an Inquiry Register which will:

- (i) at minimum, document the following details for each inquiry received: the name of the Stakeholder, the date the inquiry was received, the method of communication, a description of the inquiry, who provided a response, when a response was provided, the response method, and copies of all written inquiry correspondence; and
- (ii) be kept up-to-date and provided to the City on a bi-weekly basis through the Communications and Engagement Working Group and, otherwise, upon request.

The Inquiry Register will be developed and implemented within 30 Business Days of the Effective Date and will be transferred to the City upon Construction Completion.

- (m) a communications protocol, with input and direction from the City through the Communications Working Group, that describes how Project Co will meet its obligations described in Schedule 12 [*Communications and Engagement*]. The protocol will include, but is not limited to:
 - (i) roles and responsibilities matrix;
 - (ii) decision-making processes;
 - (iii) processes through which Project Co will effectively interface and integrate with the City to meet the requirements of this Schedule 12 [*Communications and Engagement*]; and
 - (iv) other requirements as required by the City.

The communications protocol will be submitted to the City pursuant to Schedule 2 [*Submittal Review Procedure*] no later than 60 Business Days after the Effective Date and an updated communications protocol will be submitted annually, at a minimum.

- (n) notwithstanding the requirements outlined elsewhere in this Schedule 12 [*Communications and Engagement*], regular reporting during the Construction Period, including:
 - (i) quarterly summary and evaluation of Project Co's activities in support of this Schedule 12 [*Communications and Engagement*];
 - (ii) quarterly look-ahead and work plan for Project Co's activities in support of this Schedule 12 [*Communications and Engagement*];
 - (iii) quarterly summary and evaluation of issues related to day-to-day design and construction, including themes and proposed improvements to problem areas; and
 - (iv) summary and evaluation of research undertaken to support the ongoing evaluation of Project Co's communications activities, delivered annually, at a minimum.
- (o) a local site office, located along the alignment and easily accessible, for the purposes of holding scheduled meetings with Stakeholders;
- (p) a local contact phone number and email address for the purposes of receiving Stakeholder inquiries related to day-to-day Design and Construction matters, and which shall be included on appropriate Project Co communications and Stakeholder relations materials, to be established within 20 Business Days of the Effective Date;
- (q) social media channels, including Facebook, Instagram, Twitter, to be established no later than 60 Business Days of the Effective Date;
- (r) a mechanism or mechanisms for collecting subscribers in order to distribute day-to-day Design and Construction information via email and via SMS pushes to cellphones to be established no later than 60 Business Days of the Effective Date;

- (s) communications collateral, to be submitted to the City, including but not limited to:
 - (i) construction bulletins, to be distributed across multiple channels to effectively communicate day-to-day Design and Construction activities and/or impacts;
 - (ii) paid print and digital advertisements and postcards to be mailed out to raise awareness of major construction disruptions or closures;
 - (iii) project mailouts to provide general Project information and provide updates about Design and Construction progress;
 - (iv) key message documents to support media relations activities;
 - (v) displays and information booths for use at community events or other pop-up style events; display boards for use during City-led Project information sessions;
 - (vi) fact sheets to explain Design and Construction progress and/or technical information; and
 - (vii) promotional merchandise to promote the overall Project.
- (t) updated artists' renderings that match or exceed the technical quality and visual fidelity of existing artists' renderings for the Project, no later than six months prior to the commencement of Construction of the Infrastructure in question. Project Co will provide renderings of the following:
 - (i) all stops and stations;
 - (ii) all bridges;
 - (iii) transit centres;
 - (iv) Traction Power Substations for each of the 5 different exteriors identified in the Design Guide, including the substations located near 124 Street, 132 Street and 156 Street;
 - (v) the Lewis Farms Storage Facility; and
 - (vi) the OMF expansion facility at Gerry Wright.
- (u) updated artists' renderings that match or exceed the technical quality and visual fidelity of existing artists' renderings for the Project, to be supplied within 60 Business Days of a significant Design change;
- (v) production of videos of no more than five minutes in edited length to be shared across all appropriate Project Co communications channels, and provided to the City for its own distribution, including:
 - (i) an annual Construction season look-ahead video, to be produced and provided to the City on April 1 of each calendar year, or on a date otherwise agreed to by the City;
 - (ii) an annual Construction season wrap-up video, to be produced and provided to the City on November 1 of each calendar year, or on a date otherwise agreed to by the City, and in any case, no later than the end of the calendar year;

- (iii) time-lapse videos of Construction (from start to finish) of the following major landmarks, to be provided to the City no later than 40 Business Days prior to Construction Completion or on a date otherwise agreed to by the City:
 - (A) Misericordia Station;
 - (B) West Edmonton Mall Station;
 - (C) Bridge over Anthony Henday Drive;
 - (D) Bridge over Groat Road; and
 - (E) Up to 5 other locations, as determined by the City;
- (iv) time-lapse videos of the following Construction milestones, to be provided to the City no later than 5 Business Days after completing the activity:
 - (A) the first girder lift for the elevated guideway
 - (B) the last girder lift for the elevated guideway; and
 - (C) up to 5 other Project milestones, as determined by the City;
- (v) videos that explain significant changes or closures to existing infrastructure, to be delivered to the City no later than 20 Business Days prior to the start of that change or closure or on a date otherwise agreed to by the City (up to 18 for the Construction Period), the timing of which will be directed by the City on reasonable notice to Project Co; and
- (vi) a video that explains the testing and commissioning process, to be produced and provided to the City 20 Business Days prior to the start of testing and commissioning, unless otherwise agreed to by the City.

Rough cuts of all videos produced for the purposes of this Schedule 12 [*Communications and Engagement*] will be submitted to the City 10 Business Days prior to the scheduled due date.

- (w) photographic documentation of Project activities, progress and milestones throughout the Construction Period, delivered to the City monthly, at a minimum, using professional photography services for the purposes of City communications activities. This documentation should be in addition to any requirements in Schedule 4. Photographs should capture:
 - (i) ongoing construction activities;
 - (ii) each major Construction site;
 - (iii) each major Project milestone; and
 - (iv) testing and commissioning.

- (x) upon request and/or upon Construction Completion:
 - (i) all final art, design and animation files shall be delivered to the City, including, but not limited to Adobe Creative Suite (e.g. Photoshop, InDesign, Illustrator, After Effects) or other graphics platforms;
 - (ii) all working and final video files shall be completed and delivered to the City when complete including
 - (A) all web-ready compressed HD/UHD Video files; and
 - (B) final production files including but not limited to Premiere, After Effects, Photoshop and Final Cut Pro shall be delivered to the City via hard drive or file share.
 - (iii) all edited and raw photography files shall be delivered to the City via hard drive or file share;
 - (iv) all photo and video files shall be tagged with the shoot name and other relevant content keywords specific to each image for stock management system; and
 - (v) releases shall have been obtained for all photo and video files, as appropriate, and executed releases shall be delivered to the City.

Appendix 12A: Indigenous Engagement: Stakeholders

- (a) Treaty 6 Nations
 - (i) Alexander First Nation
 - (ii) Alexis Nakota Sioux Nation
 - (iii) Beaver Lake Cree Nation
 - (iv) Cold Lake First Nations
 - (v) Enoch Cree Nation
 - (vi) Ermineskin Cree Nation
 - (vii) Frog Lake First Nation
 - (viii) Heart Lake First Nation
 - (ix) Kehewin Cree Nation
 - (x) Louis Bull Tribe
 - (xi) Montana First Nation
 - (xii) O'Chiese First Nation
 - (xiii) Onion Lake Cree Nation
 - (xiv) Paul First Nation
 - (xv) Saddle Lake Cree Nation
 - (xvi) Samson Cree Nation
 - (xvii) Sunchild First Nation
 - (xviii) Whitefish (Goodfish) Lake First Nations
- (b) Treaty 7 Nations
 - (i) Blood Tribe (Kainai Nation)
 - (ii) Piikani Nation
 - (iii) Siksika Nation
 - (iv) TsuuT'ina Nation
- (c) Treaty 8 Nations
 - (i) Horse Lake First Nation

- (d) Métis Nation - Region 2 & 4
 - (i) Métis Nation of Alberta Region 2
 - (ii) Métis Nation of Alberta Region 4
- (e) Local First Nations Organizations
 - (i) Michel First Nation
 - (ii) Papaschase Cree Nation Society
- (f) Partner Organizations
 - (i) Confederacy of Treaty Six First Nations
 - (ii) Métis Nation of Alberta

Appendix 12B: Stakeholders

The following persons are “Stakeholders” for the purposes of the Agreement, however it is expected that Project Co will further validate and add to this list for the duration of the project:

- (a) Residents of Edmonton
- (b) Current and future users of the Edmonton Transit Service (ETS) Network;
- (c) Drivers, pedestrians, cyclists and users of active transportation modes;
- (d) Landowners, business owners and residents along the Valley Line West corridor;
- (e) Medical, educational and other public institutions;
- (f) Mainstream news media and citizen journalists;
- (g) Indigenous Peoples;
- (h) Emergency Services;
- (i) City staff, City Council and advisory boards;
- (j) Other Governmental Authorities;
- (k) Festivals and events;
- (l) Special interest groups;
- (m) Citizen Working Groups;
- (n) Developers;
- (o) Other projects in the proximity; and
- (p) Others, as identified by the City at any time.

Appendix 12C: Research Requirements

Project Co will adhere to the following requirements and best practices for research, unless otherwise agreed to by the City:

(a) Telephone survey

- a. The City requires a sample of at least 400 residents of Edmonton.
- b. Telephone sampling will have a minimum split of 50% cellphone and 50% landline. The City would prefer to attain a 60% cellphone and 40% landline mix, in order to account for the lack of general population representation from landline only sampling.
- c. Phone questionnaires should be at least 15 minutes long and include 2 open ended questions.
- d. The City is also open to Project Co suggestions regarding telephone sampling and experience given current trends and low telephone response rates.
- e. To ensure the sample collected accurately represents the population of Edmonton, the following demographic breakdowns are proposed:
 - i. Gender identity proportions based on the latest census data
 - ii. Proportions based on the City quadrant. These breakdowns will be based on FSA (Forward Sortation Area) and the Project Co is free to recommend refinement.
 - iii. Age distribution (18-34, 35-54, 55+) as per the latest census.
 - iv. The City understands an exact match will not be possible to obtain. Gender identity proportions based on the latest census data

(b) Online Panel survey (Project Co Panel)

- a. The City would require a similar sampling method that was noted in the telephone survey section and the same number of completed surveys (n=400).
- b. Surveys should be at least 15 minutes long.

(c) City of Edmonton Insight Community (owned and administered by the City, data set cleansed and analysed by the Project Co). The City will program all surveys and send to the Edmonton Insight Community members.

- a. Surveys should be at least 15 minutes long and would have approximately 2,000 respondents.
- b. The City will provide the successful Project Co with data in csv, excel or spss as required;
- c. Project Co will test the programmed survey to ensure data quality and survey function.

- (d) Online open survey distributed to stakeholders, other interested members of the public
 - a. Surveys should be at least 15 minutes long and target approximately 2,000 respondents
 - b. Subject to project needs, a survey may be made available to the public or stakeholders.
 - c. Additionally, the project team can promote this link via City communications channels as required. Quotas will not be possible. Weighting may be required.
- (e) Focus groups: General Population recruitment
 - a. Focus groups may be required for specific information. Please provide costs for a focus group, including all logistical items, such as, sampling, recruitment, guide development, moderation, hosting and catering. Please provide cost per focus group
 - b. Focus groups should be approximately 2 hours long, with 8-10 respondents.
 - c. Recruitment from the general population.
- (f) In-depth interviews with impacted Stakeholders
 - a. In-depth interviews may be required for specific impacted stakeholders. If required, depending on the information required, the City may need in-depth interviews in-person or by telephone.
 - b. This would provide the City with the opportunity to probe further and explore areas of importance.
 - c. Should be 30 minutes long

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