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EMTSC Strategic Objectives Development

Final Report
March 2022

Reaffirming our Strategic Objectives



EMTSC Board of Directors (top row left to right) - Councillor Wes Brodhead, City of St. Albert; Councillor Andrew Knack, City of Edmonton; Councillor Sam Munckhof-Swain, City of Beaumont; Councillor Ben Gronberg, Town of Devon; Councillor Stuart Houston, City of Spruce Grove; Councillor Gordon Harris, City of Fort Saskatchewan; Councillor Justin Laurie, Town of Stony Plain; Councillor Glen Finstad, City of Leduc

Integrated regional transit will be a critical driver in supporting growth in the Edmonton Metropolitan Region and advancing local municipal policy goals.

The Edmonton Metropolitan Transit Services Commission (EMTSC) was officially formed in January 2021 and has been tasked with bringing a shared vision for regional transit to life.

The pandemic has had a significant impact on our communities and the resulting economic and social uncertainty has reinforced the need for regional collaboration.

We are committed to delivering regional transit in 2023 so that our region can begin to realize the many benefits that this approach will bring.

With this ambitious timeline and a new post-pandemic landscape in mind, we recognized the need to level-set and reaffirm our strategic objectives. This process meant addressing any emerging issues, assessing priorities, and aligning on a way forward to better enable the EMTSC to achieve its goals.

As always, underpinning this process is our commitment to working together and maintaining a strong voice for our local municipalities.

Reaffirming our Strategic Objectives - continued

A series of interviews and working sessions were held with Board members, EMTSC executives and representatives from the City of Edmonton's administration to inform the development of our strategic objectives. These objectives focused on:

- Securing stakeholder support
- Delivering service in 2023
- Reaffirming member participation
- Aligning with local policy
- Coordinating with regional partners
- Developing dynamic mobility services
- Committing to robust communication
- Establishing effective resourcing
- Maintaining financial sustainability

A number of key activities that will enable our strategic objectives were considered and prioritized. These activities have been mapped out over a near, medium and long-term timeline. The near-term activities were grouped into five broad workstreams to help guide the overall workplan. These workstreams include:

1. Service Planning
2. Working with Edmonton
3. Communication and Branding
4. Partnerships, Relationships and Advocacy
5. Corporate Elements

The activities and our objectives will guide our path forward as we continue on our mission to deliver regional transit.

This revisiting of our mission along with reasserting a shared understanding of our priorities will drive the EMTSC in the coming days, weeks, and months.

We are more committed than ever to the vision of regional transit and the essential benefits it will deliver to our communities and the Edmonton Metropolitan Region.



Table of Contents

Content	Page	Details
Reaffirming our Strategic Objectives	2-3	<ul style="list-style-type: none">• Introduction and executive summary
Vision for Regional Transit	5-6	<ul style="list-style-type: none">• A brief overview of the current EMTSC purpose, vision and mission
SWOT Analysis	7-9	<ul style="list-style-type: none">• Assessment of EMTSC and regional transit positioning
Strategic Objectives	10-12	<ul style="list-style-type: none">• Summary of strategic objectives developed by the Board
Enabling Activities	13-19	<ul style="list-style-type: none">• Near-term activities to enable strategic objectives
Near-Term Activity Prioritization	20	<ul style="list-style-type: none">• Prioritization of the near-term activities
Medium and Long-Term Activities	21	<ul style="list-style-type: none">• Medium and long-term activities that support strategic objectives
Integrated Roadmap & Implementation Priorities	22-23	<ul style="list-style-type: none">• Sequencing of near, medium and long-term activities that enable strategic objectives
Long -Term Benefits & Moving Forward	24-25	<ul style="list-style-type: none">• Summary long-term benefits and brief outline of the way forward

Vision for Regional Transit



Existing purpose, vision and mission



EMTSC purpose

Bringing municipal transit services together for the benefit of one region



EMTSC vision

Experience the future of mobility where you can go any place, at any time and in the way you choose



EMTSC mission

To enable a variety of sustainable mobility options that best serve our regions people and communities

ENABLING:



Regional Mobility



Cost Effectiveness



Service Delivery Flexibility



Growth and Sustainability



Regional Collaboration

SWOT Analysis



SWOT Analysis – EMTSC current state

STRENGTHS

- The majority of councils support transit and the EMTSC.
- The EMTSC is a debt holding organization which is beneficial for municipalities.
- The pandemic has reset expectations and decreased the pressure on timelines for the EMTSC.
- A commission can leverage resources across the region to deliver greater benefits.
- All participants in the commission are willing participants.
- There has been significant levels of growth in the Edmonton Metro Region.

WEAKNESSES

- Communication between councils and the EMTSC had not been consistent or structured.
- Like all legacy transit systems, ETS has a mixed reputation amongst the general public and public perception sees transit as inefficient.
- EMTSC has not developed their culture or brand yet.
- Recruitment to the EMTSC has been challenging.
- Transit use in smaller municipalities is not established.
- Historical land use planning does not support public transit use.
- EMTSC does not have the stature of a operating organization yet.

SWOT Analysis – EMTSC current state

OPPORTUNITIES

- Different models for smaller communities are an option.
- The pandemic has reset expectations and decreased the pressure on timelines for the EMTSC.
- Conserted stakeholder engagement could help with council buy-in.
- The majority of councils think that Edmonton limiting service to regional services only would not be a major problem.
- A brand could distance EMTSC from ETS’s negative public perception.
- Partnerships and alternative agreements with rural counties.
- Partnerships with First Nations could support local indigenous communitis and yield access to additional funding streams.
- The majority of municipalities would be willing to utilize ETS resources.
- Incorporating Smart fare could yield efficiencies and could be linked with the brand launch.
- Social media as a cost-effective tool to reach new and broader audiences.

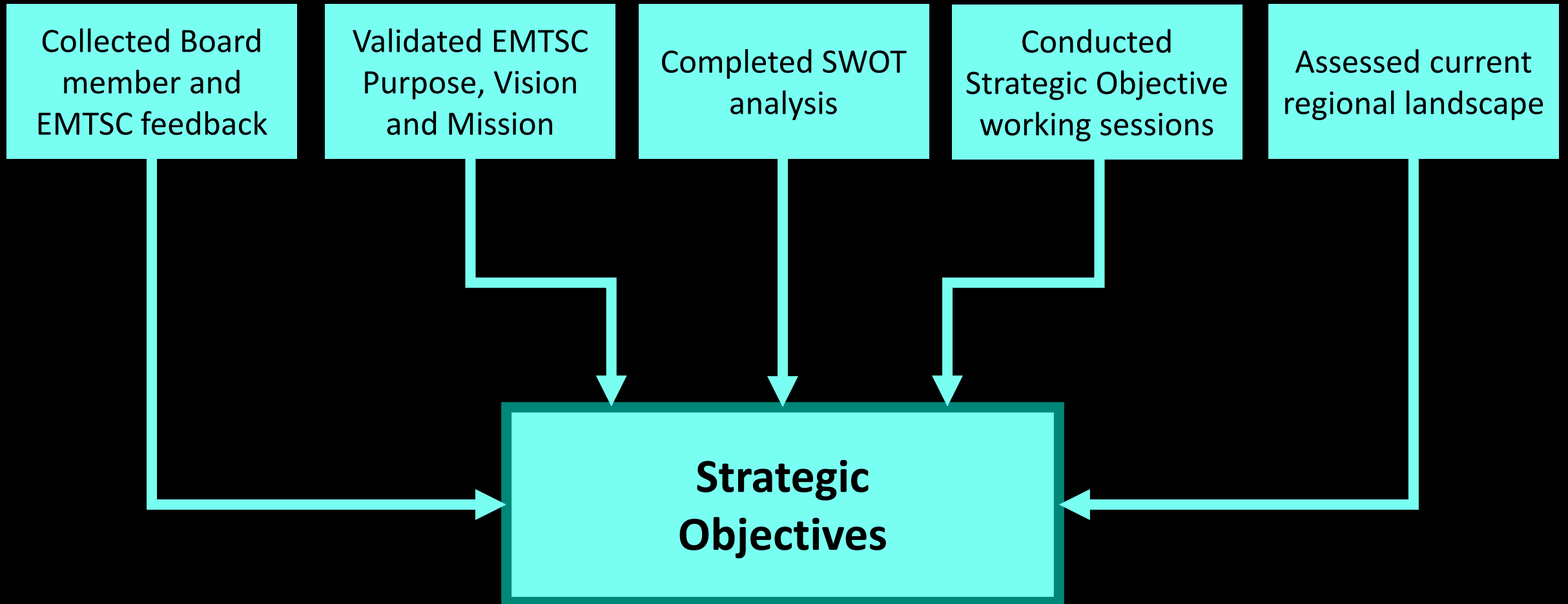
THREATS

- All councils expect service to start in 2023 and start receiving benefits in under 2 years. The more time that passes without service the more likely municipalities are to leave and the less willing they are to invest.
- Cost effectiveness is a priority for all councils, therefore the system cannot become too large, unmanageable and costly.
- There is a general concern that some smaller municipalites might leave although this is not seen as fatal. Edmonton and St Albert leaving is fatal.
- Incorporating staff and systems will be challenging.
- Some see an incremental approach as too timid.
- Reduced ridership might not pick back up.
- Political uncertainty that comes with the provincial election period.
- The City of Edmonton’s collective bargaining process could yield complications with integration.
- Unrealistic (pre-pandemic) ridership growth expectations.
- Current governance, funding and membership structures not condusive to creating sustainable funding, service and organizational frameworks

Strategic Objectives



Building our Strategic Objectives



Strategic Objectives

1 Stakeholder support

Broad public and stakeholder support and understanding of the benefits of the EMTSC and a regionally integrated public transit service delivery

4 Complimentary to local policy

An EMTSC and regional transit service that complements local social, environmental, economic and growth policy objectives

7 Clear communication

A shared understanding on how the EMTSC interacts with member municipalities' Board members, councils, and administrations

2 2023 Service

Regionally integrated transit service being delivered in 2023

5 Coordination with partners

Coordinated regional transit approach involving all regional municipalities and key partners

8 Effective resourcing

A business model that leverages existing resources resulting in benefits and efficiencies being realized

3 Full member participation

Full participation by all EMTSC member municipalities in the delivery of regional transit

6 Dynamic mobility services

Dynamic regionally planned and locally informed mobility services

9 Financial sustainability

Financial sustainability augmented by alternative funding models and/or diversified funding sources

Activities to enable Strategic Objectives



Activities to enable Strategic Objectives

In this section near, medium and long-term activities have been identified and outlined on a timeline. All activities are intended to support the achievement of our Purpose, Vision and Mission.

The near-term activities were developed during the interview and workshop process with EMTSC Board members and executives. They have been categorized across various functional streams and have been prioritized.

The medium and long-term activities were developed over the course of the formation of the commission and are based on leading practices for organizational growth.

Items reflected in medium and long-term activities have been designed to support EMTSC's strategic objectives and are not indicative of an exhaustive list of activities that will be required to advance normal business operations.

Service Planning	edmonton metro transit services commission
Working with Edmonton	edmonton metro transit services commission
Communication and Branding	edmonton metro transit services commission
Partnerships, Relationships & Advocacy	edmonton metro transit services commission
Corporate Elements	edmonton metro transit services commission

Key activities

- CE1. Confirm EMTSC staffing matrix and hiring timelines to support strategic objectives activities
- CE2. Map EMTSC staffing matrix against corresponding roles in municipal transit organizations, including those not participating in the EMTSC
- CE3. Establish service transition working teams across municipal organizations and the EMTSC
- CE4. In parallel to service planning activities, begin outlining operations transition plan
- CE5. Establish an organizational culture

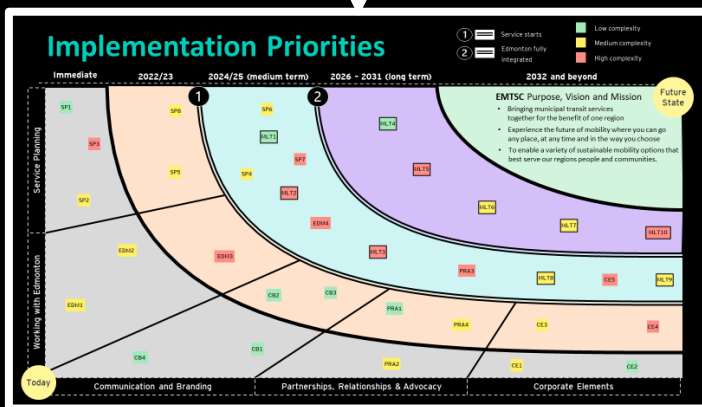
Medium and Long Term Activities	edmonton metro transit services commission
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Key activities

- MLT1. Revitalize the strategic plan ensuring alignment with regional growth and EMB's growth plan
- MLT2. Revitalize the municipal funding model including a review of the services fare policy
- MLT3. Develop a comprehensive ESG plan including mechanisms to track and reduce the services energy consumption and aligning the commission's environmental goals with federal, provincial and municipal partners
- MLT4. Plan and implement board and employee succession policies
- MLT5. Conduct an infrastructure review, assessing emerging technologies, ensuring assets are in a good state of repair and updating asset acquisition policies
- MLT6. Develop a ridership growth strategy
- MLT7. Explore partnerships to enable new service offerings and expansion
- MLT8. Create a plan to reduce employee discontent, increase employee retention, improve interdepartmental communication, improve training and ensure a diverse and equitable workforce
- MLT9. Review customer satisfaction and ensure services are accessible and inclusive
- MLT10. Review processes and tasks to ensure efficiency and cost effectiveness

Prioritization of Activities to enable Strategic Objectives in the near term	edmonton metro transit services commission
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Stream/Activity	Priority 1	Priority 2	Priority 3	Priority 4
Service Planning	SP1	SP2	SP3	SP4
Working with Edmonton	EA01	EA02	EA03	EA04
Communication and Branding	CB1	CB2	CB3	CB4
Partnerships, Relationships & Advocacy	PR01	PR02	PR03	PR04
Corporate Elements	CE1	CE2	CE3	CE4



Service Planning

Key activities

- SP1. Establish target service commencement date
- SP2. Confirm tools and resources to execute service planning activities
- SP3. Create opening day and future state routes and service
- SP4. Create performance indicators that better demonstrate the benefits of integrated transit beyond ridership and cost recovery
- SP5. Develop a policy and mechanism for municipality feedback regarding overall route and service delivery, including specific local service
- SP6. Create a policy and mechanism for public feedback regarding overall route and service delivery
- SP7. Establish data collection and sharing framework between municipalities, the EMTSC, service providers, Edmonton Global and the Edmonton Metropolitan Region Board
- SP8. EMTSC to be an active participant in the Smart Fare program

Working with Edmonton

Key activities

- EDM1. Catalogue Edmonton tools and resources and those of surrounding municipalities and determine which best suit EMTSC needs
- EDM2. Determine if Edmonton and other municipalities are willing to enter into a business arrangement with the EMTSC to provide access to tools and resources
- EDM3. Work with both Edmonton Council and Administration to address any concerns and determine any steps and specific outcomes which must be completed to achieve full service integration by Edmonton

Communication and Branding

Key activities

- CB1. Establish an effective and transparent communication strategy and framework considering needs of differing key audiences
- CB2. Develop a formal mechanism and policy for receiving and remedying non-service related feedback from member municipality's (including Board, Councils and Administrations)
- CB3. Finalize branding exercise and build public awareness of the EMTSC and the benefits of a regionally integrated transit system
- CB4. Deploy comprehensive stakeholder engagement program for reinforcing the brand, benefits of regional transit and opportunities to partner

Partnerships, Relationships & Advocacy

Key activities

- PRA1. Connect with regional organizations to establish consistent messaging to align advocacy campaigns and positions
- PRA2. Develop a specific provincial election advocacy campaign
- PRA3. Identify alternative funding sources and develop new potential financial models including exploration of a formal relationship with the federal government
- PRA4. Reconnect with Indigenous communities in the Region

Corporate Elements

Key activities

- CE1. Confirm EMTSC staffing matrix and hiring timelines to support strategic objectives activities
- CE2. Map EMTSC staffing matrix against corresponding roles in municipal transit organizations, including those not participating in the EMTSC
- CE3. Establish service transition working teams across municipal organizations and the EMTSC
- CE4. In parallel to service planning activities, begin outlining operations transition plan
- CE5. Establish an organizational culture

Prioritization of Activities to enable Strategic Objectives in the near term

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Workstream	Priority 1	Priority 2	Priority 3	Priority 4
Service Planning	SP1: Confirm service commencement date	SP3: Opening and future routes and services	SP7: Data framework	SP4: Measurable KPIs
	SP2: Confirm tools and resources for service	SP5: Municipality service feedback mechanism	SP8: Integrate Smart fare	SP6: Public service feedback mechanism
Working with Edmonton	EDM1: Confirm existing tools and resources	EDM3: Full integration steps		
	EDM2: Confirm business arrangement willingness			
Communication and Branding	CB1: Communication Strategy	CB3: EMTSC branding and public awareness	CB4: Stakeholder engagement strategy	
		CB2: Non-service feedback mechanism		
Partnerships, Relationships & Advocacy	PRA2: Provincial election strategy	PRA4: Indigenous community engagement	PRA3: Alternative funding sources	
	PRA1: Consistent regional messaging			
Corporate Elements	CE1: EMTSC Staffing Matrix	CE3: Establish service transition working teams	CE5: Establish organizational culture	
	CE2: Map staffing matrix against other organizations	CE4: Operations transition plan		



Objectives	
1.	Stakeholder support
2.	2023 Service
3.	Full member participation
4.	Complimentary to local policy
5.	Coordination with partners
6.	Dynamic local service
7.	Clear communication
8.	Effective Resourcing
9.	Financial sustainability

Medium and Long-Term Activities

Key activities

- MLT1. Formalize a coordinated and strategic approach to labour relations
- MLT2. Establish integrated planning and operations with Edmonton
- MLT3. Develop a comprehensive ESG plan that supports regional environmental objectives and aligns with local social policy goals
- MLT4. Develop organization's people strategy and align with overall corporate strategy
- MLT5. Develop a Diversity, Equity and Inclusive (DEI) program
- MLT6. Reevaluate the strategic plan supporting alignment with regional growth plans
- MLT7. Facilitate a regional fare policy review
- MLT8. Conduct an infrastructure review, assessing emerging technologies and updating asset acquisition policies
- MLT9. Develop a ridership growth strategy
- MLT10. Explore partnerships to enable new mobility and service offerings
- MLT11. Conduct a comprehensive organizational review
- MLT12. Align governance, funding and membership structures to ensure long term organizational service and financial sustainability

Items reflected in medium and long-term activities have been designed to support EMTSC's strategic objectives and are not indicative of an exhaustive list of activities that will be required to advance normal business operations.

Integrated Roadmap – how to read the diagram

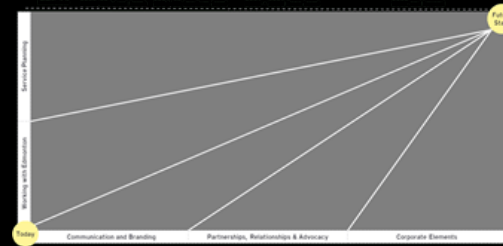
The purpose of the integrated roadmap is to combine the activities outlined in the rest of the report with an overlaid view of assessments related to both complexity and ability to resource. This should assist the commission in determining what needs to be done to achieve the various strategic objectives outlined in this report. These activities will aid the commission in achieving key time-sensitive milestones, including, delivering service in 2023 and fully integrating Edmonton into the system by the end of 2025. Several medium and long-term activities are also included to aid the commission in its long-term strategic planning.



Activities

Activities supporting the strategic objectives have been filtered into the remainder of 2021-22 and 2022-2023 to outline what needs to be done to achieve service in 2023. Activities listed in 2024-2025 outline what needs to be done to fully integrate Edmonton's service by 2025. The remainder of the activities are listed in 2026-2031 and 2032 and beyond are strategic in nature.

Note that activities listed in this roadmap are not a comprehensive list of all activities the EMTSC must consider as part of operations



Workstream

Activities are aligned by workstreams to better identify key areas of focus for the commission. The workstreams were developed using common themes from the interviews and workshops. The workstreams included in this report are Service Planning, Working with Edmonton, Communication and Branding, Partnerships, Relationships & Advocacy and Corporate Elements. Medium and long-term activities are not included in workstreams.

- Low Complexity
- Medium Complexity
- High Complexity

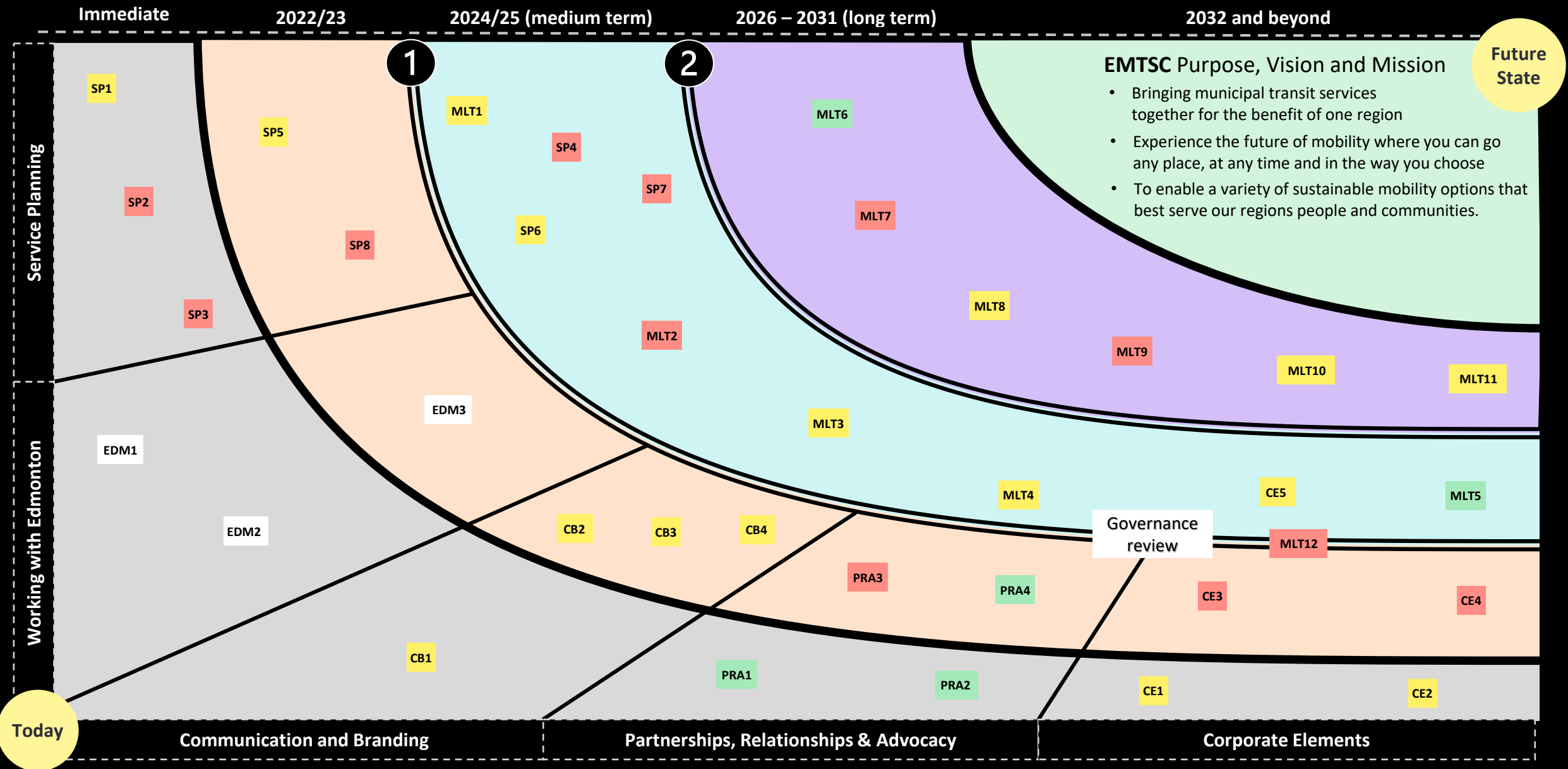
Complexity

Complexity has been considered to better inform the commission of the difficulty of implementing the various activities. The following components have been considered in the assessment of complexity:

- Ability to resource
- Cost
- External dependencies

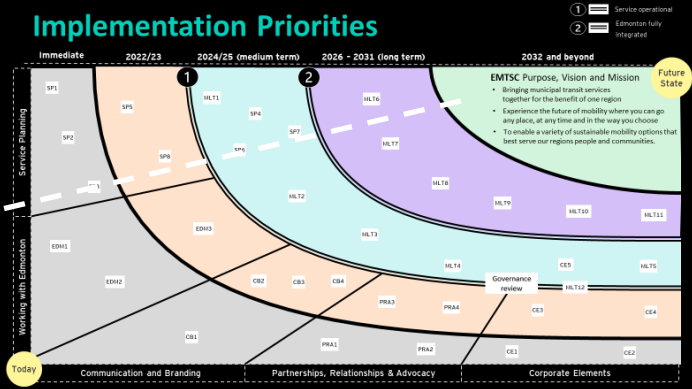
Implementation Priorities

①		Service operational		Low complexity
②		Edmonton fully integrated		Medium complexity
				High complexity



Advancing strategic objectives in pursuit of long-term benefits

Working toward fulfilling the EMTSC Purpose, Vision and Mission



Financial

The forecasted funding shortfall of operating transit services under the RTSC is lower than that of operating services separately, despite savings calculations only including service hour efficiencies and reduction in non-revenue hours.

Customer

A regional transit services network provides more seamless and efficient movement of people across municipal boundaries resulting in a better customer experience as a result of factors such as increased directness, speed of travel and simplicity of trip planning.

Service Provider

A regional transit services provider is more equipped to action on regional objectives and engage with stakeholders to enlist support in transit for the purposes of improving service delivery and facilitating regional mobility on a larger scale.

Community

Through the delivery of regional transit services, people can become less reliant on personal vehicle use and have more choice when it comes to where they want to live, work and play, which equates to a higher quality of life and community prosperity.

Economic

Regional transit services improve the connectivity and economic growth of the region by increasing access to employment opportunities, attractiveness of the region for business investment, and reduced infrastructure costs to municipalities and the province.

Environmental

A regional transit service allows for the more efficient deployment and management of assets across the network to reduce waste and emissions across the system, and supports a mode shift away from personal vehicles reducing overall environmental impact to the region.



Moving Forward

- The strategic objectives and associated activities will guide our path forward as we continue on our mission to deliver regional transit.
- This revisiting of our vision along with reasserting a shared understanding of our priorities will drive the EMTSC in the coming months and years.
- We remain committed to the vision of regional transit and the important benefits it will deliver to our communities and the Edmonton Metropolitan Region.



Next Steps

- Receive and incorporate Board feedback
- Bring final version back in May for Board endorsement through special resolution in public session
- Post strategic objectives to EMTSC.ca