



Standing Committee of Council Meeting

Civic/Cultural Center – 5018 Waghorn Street

January 18 at 7:00 pm

AGENDA

1. **Call to Order**
2. **Adoption of Agenda**
 - 2.1 Agenda for January 18, 2021
3. **Delegation**
 - 3.1 Klassic Kennels – Animal Control Services – Year End Review – Jim De Boon
 - 3.2 BDO Canada LLP – Alan Litster, Steven Sypkes, Mitchell Kennedy (remote presentation)
4. **Public Hearing**

None
5. **Business Arising from Minutes**

None
6. **Business**
 - 6.1 [Request for Direction](#), Seniors Facility Lease
 - 6.2 [Request for Direction](#), Safety Codes Services Draft Request for Proposal
 - 6.3 [Request for Direction](#), Alberta Civil Society Fund – Letter of Support
 - 6.4 Council Meeting – Virtual meeting discussion (Verbal)
 - 6.5 [Municipal Index Comparison – January 2020](#)
 - 6.6 [Council Budget Process](#)
7. **Action Correspondence**

None
8. **Information**
 - 8.1 [Report to Council](#), 2021 Municipal Census Program – Revised Process
 - 8.2 [WCPS Budget & District Priorities Input Invitation](#)
 - 8.3 [PRL Board Talk – November 12, 2020](#)
9. **Round Table Discussion**

None
10. **Adoption of Minutes**

None
11. **Notices of Motion**

None
12. **Business for the Good of Council**

None
13. **Confidential**
 - 13.1 FOIP, Sec 24
14. **Adjournment**

Future Meetings/Events:

- Regular Council Meeting – Tuesday, January 26, 2021
- Regular Council Meeting – Tuesday, February 9, 2021
- SCC No Meeting due to Statutory Holiday



**TOWN OF BLACKFALDS
COUNCIL MEETING
REQUEST FOR DECISION**

MEETING DATE: January 26, 2021

ORIGINATED BY: Preston Weran, Director of Infrastructure and Property Services

SUBJECT: Bylaw 1254.21 Amendment to Utility Bylaw –
Schedule “B” 2021 Rate Options 1 and 2

BACKGROUND:

In the last part of 2020, the Utility Bylaw was approved as Bylaw 1250.20. This bylaw included a schedule “B” for 2020 Rates which was passed and we are now looking at the 2021 rates. This schedule is planned to be amended yearly now after the operating budget is approved by Council.

On December 12, 2020, the 2021 operating budget was passed by Council as per the resolution below:

Resolution No. 347/20

Councillor Taylor moved that Council move to accept the recommendation of Administration to approve the 2021 Town of Blackfalds Operating Budget of \$28,579,080.

CARRIED

Opposed: Councillor Svab, and Councillor Stendie

As discussed at the January 12, 2021 Council meeting, the 2021 operating budget included changes to the residential (and commercial) water and sewer utility rates for 2021. Bylaw 1254.21 amendments Schedule B, 2020 rates to 2021 rates was presented. This amendment prompted good discussion around the utility rates planned for the current years’ operating budget for sewer and water services and the possible impacts through the pandemic and economic downturn that many of our rate payers have experienced over the last year. General impacts of holding the water and sewer rates at 0% increase were discussed around return to reserves and developing healthy reserve funds for future asset replacement in the 20-50 year horizon. With the utility rate model for the next 5 years planned to be established in 2021, Administration has prepared the following report to provide clarity to Council’s questions raised and to provide more information.

The proposed water and wastewater rate yearly increase across 3900 accounts provides additional utility revenue of \$242,954. This amount equates to an average increase per month of \$3.47 for a family of 4 and was provided as information at budget time. Further discussion by Council requested a review by Administration to look at a 0% option as per the resolution below:

Resolution No. 007/21

Councillor Hoover moved that Council refer this Bylaw 1254.21 back to Administration for further consideration for a 0% rate increase.

CARRIED

Opposed: Deputy Mayor Stendie, Councillor Olfert, Councillor Taylor



TOWN OF BLACKFALDS COUNCIL MEETING REQUEST FOR DECISION

DISCUSSION:

Administration has undertaken a review of our reserves and assets and is presenting a 0% rate increase option and information that provides impacts of these 2 options (rate increase & no increase) for Council's consideration.

It is of note that if the 0% option was decided on, this rate would only be recommended to be maintained for this budget year as future reserve balances would suffer greatly if the rates were not increased each year, based on all the factors a utility rate model looks at. Overall, increasing costs include CPI increases and hard costs at the commission and local level to maintain the system. However, as you see in the following information below, a yearly reprise of the bylaw's utility rate escalation would not impact the long term saving overall, other than the initial lump sum identified below as the Impact on Reserves for this year.

Information

Included below is some general information including definitions to assist in guiding discussion and sharing of information.

Town Water/Sewer Costs =

Cost of service per year (Fixed costs + Consumption + Capital Infrastructure Replacement)

1. Rates that are set, (the revenues) are used to fund these costs above, each year, any unused funds under the operating water and sewer budget, along with the planned transfer to capital reserve (2-41-00-960) for water and wastewater are then returned to our capital reserves for future year funding of asset maintenance and builds.
2. Off-site Levies = fund new infrastructure only (our ten-year plan relating to water and sewer expansions)
3. Utility Rate Model = looks at the fixed, consumption and capital infrastructure replacement rate, to determine if there is an agreement to plan to fully fund the operations/maintenance of new and existing assets and the partial funding ability to replace/repair the old assets over the life of the asset.
4. Depreciation = the loss of the asset's useful life to provide service over the course of its lifecycle (ie: when it needs to be replaced).
5. Asset replacement contributions = return to reserves, budgeted each year should be 2 x their annual depreciation.
6. Infrastructure Gap = Due to lack of municipal and government funds, these return to reserve targets under the TCA are not typically met for most assets under control of a municipality.
7. Water and Sewer Gap = sitting at approx. 50%, therefore our depreciation is happening at 50% higher rate then our reserve contributions are being funded at currently.



TOWN OF BLACKFALDS COUNCIL MEETING REQUEST FOR DECISION

2021 Budgeted Rates

Our current 2021 hard costs are outlined below for water and sewer, respectively under codes 1-41-00-421 (water) and 1-42-00-421 (sewer) however, increases to operational scope; such as more reporting requirements, environmental mandates, pretreatment, lead mitigation, metric tracking/smart system upgrades, emergency water supply and distribution, contamination of system, materials, training and increased size of this system, continue to be outliers of this overarching report as we move forward towards better water steward parameters for both water and wastewater. Through our utility rate review, these hard and fixed costs will be refined to ensure that the ratio between fixed, consumption and infrastructure funds for water and sewer are better rationalized over the next 5 years. Our last rate model, ended in in 2020, therefore, the rates proposed in 2021 are a stop gap measure presented by Administration based on the last 5 years of information and the current information that we have surrounding costs vs. expenses now and into the future.

2021 Fixed Rate Revenue

1-41-00-421 (water)	\$814,320
1-42-00-421 (sewer)	\$696,384

2021 Consumption Rate Revenue is based on estimated cu.m of water at 842,400 and sewer at 80% 673,920 cu.m treated.

(based on average water use of 18 cu.m. x per 3900 accounts x 12 months. 80% of water consumption of sewer)

Revenue Code	Town Rate Rates: (per cu.m)	Regional Commission Rate	Remainder - Town operations
1-41-00-420 (water)	\$2,333,448 - (\$2.77)	\$1,760,616 - (\$2.09)	\$572,832 - (\$0.68)
1-42-00-420 (sewer)	\$2,102,630 - (\$3.12)	\$1,260,230.40 - (\$1.87) plus \$261,401 yearly contribution = \$1,521,631.40	\$580,998.60 - (\$0.86)

The Town, and other municipalities utilizes a three-tiered model which includes fixed rates, variable rates, and infrastructure replacement costs. If utility customers conserve water the Town would see a reduction of funds coming in, but having sufficient funds pay our staff, supply materials and services needs to maintain a complicated water and sewer utility locally.

CAPITAL INFRASTRUCTURE 2021; should be 100% of double the depreciation above, but our asset replacement contributions, in our budget are only 50% of that number, by design.

This year there are plans to undertake a utility rate model review with one of the outcomes expected to have sewer capital funds collected like water, instead of zero. However, the yearly revenues and expenses related to the rates are rectified each year to ensure that the Town has enough funds for the continued operation and payment of this utility each year without a huge jump in rates like we have mitigated since the regional wastewater system has been built and funded.



TOWN OF BLACKFALDS COUNCIL MEETING REQUEST FOR DECISION

Reserve Balances and Long Term Impacts

As a general accounting practice, the Town should contribute 2 x Annual depreciation into the respective reserves. The table below highlights the annual depreciation, 2x depreciation, current reserve and desired transfers.

2020 actuals

	Cost	Acc Dep	Net Book Value	Annual Dep	2 x Dep	Current Transfer	Deficit
Sewer	\$14,520,601	\$4,394,135	\$10,126,466	\$337,657	\$675,314	\$304,022	\$371,292
Water	\$25,227,739	\$7,953,951	\$17,273,788	\$563,802	\$1,127,604	\$635,165	\$492,439

2021 budgeted yearly reserve contributions for water is \$635,165 and for sewer is \$304,022. If we utilize the general accounting practice as outlined, the Town should be budgeting yearly contributions at \$675,314 for sewer and \$1,127,604 for water reserves. As noted above, there is an infrastructure funding gap of about 50% for water and sewer overall.

2021 budget projections and reserve balances for updated ten-year plan is as follows:

Wastewater	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Opening Balance	\$ 2,816,330	\$ 3,059,582	\$ 3,379,797	\$ 3,715,703	\$ 251,609	\$ 1,412,485	\$ 1,076,579	\$ 740,673	\$ 404,767	\$ 68,861
Prior Year Carry Over										
Annual Contributions	\$ 304,002	\$ 320,215	\$ 335,906	\$ 335,906	\$ 335,906	\$ 335,906	\$ 335,906	\$ 335,906	\$ 335,906	\$ 335,906
Operating Contributions										
One Time Contributions/With	\$ 60,750	\$ -	\$ -	\$ 3,800,000	\$ 2,000,000	\$ -	\$ -	\$ -	\$ -	\$ -
Closing Balance	\$ 3,059,582	\$ 3,379,797	\$ 3,715,703	\$ 251,609	\$ 1,412,485	\$ 1,076,579	\$ 740,673	\$ 404,767	\$ 68,861	\$ 267,045
Water	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Opening Balance	\$ 5,096,260	\$ 5,670,675	\$ 5,580,133	\$ 6,262,331	\$ 2,144,529	\$ 2,826,727	\$ 3,508,925	\$ 1,058,877	\$ 376,679	\$ 305,519
Prior Year Carry Over										
Annual Contributions	\$ 635,165	\$ 659,458	\$ 682,198	\$ 682,198	\$ 682,198	\$ 682,198	\$ 682,198	\$ 682,198	\$ 682,198	\$ 682,198
Operating Contributions	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
One Time Contributions/With	\$ 60,750	\$ 750,000	\$ -	\$ 4,800,000	\$ -	\$ -	\$ 5,250,000	\$ -	\$ -	\$ -
Closing Balance	\$ 5,670,675	\$ 5,580,133	\$ 6,262,331	\$ 2,144,529	\$ 2,826,727	\$ 3,508,925	\$ 1,058,877	\$ 376,679	\$ 305,519	\$ 987,717

As indicated in the tables we have a good funded plan to build new infrastructure (beyond water/sewer). However, for replacement of existing water and sewer assets, we will need to offset our 50% savings with borrowing in the future, grants, increase rates and other mitigation measures such as staging or regional collaboration.

The infrastructure gap is a huge problem in Alberta, Canada and the developed world and our Town is not sheltered from this issue. We are fortunate that we have some time before these long life water and sewer assets need to be replaced. Through the asset management plan, this rate review, 10 year capital and discussions around long term planning for the future financial stability of our Town we will be in a position to help mitigate this gap.

2021 Rate Analysis Option 1 and 2 (2.58% and 0% increase scenarios)

The options of having the 2021 rates remain as per budget plan and with a 0% and the impacts to our rate stabilization plan for this specific year are indicated in the following table.



**TOWN OF BLACKFALDS
COUNCIL MEETING
REQUEST FOR DECISION**

Based on average water use of 18 cu.m potable water and 80% wastewater of 14.4 cu.m.				
Option 1: 2.58% rate increase	Impact to residential (monthly)	Impact to individual residential (yearly)	Impact to Reserves (yearly)	Impact to long term TCA replacement in 20years
Remain with current 2021 planned rates for water and sewer	\$3.47 monthly	\$41.64	\$0.00	No deficit
Option 2: 0% rate increase	Impact to residential (monthly)	Impact to individual residential (yearly)	Impact to Reserves (yearly)	Impact to long term TCA replacement in 20years
Remain with previous 2020 rates for water and sewer	\$0.00 monthly	\$0.00	\$250,000 (deficit)	0.007% deficit (\$1.8M*20 years/.25M for one year

Note - commercial and industrial customers are not included in the example table above, due to the fact that the area of concern has been placed on residential customers.

FINANCIAL IMPLICATIONS:

Impact to the 2021 budget is outlined above in regards to each option presented. The water and wastewater revenues and expenses are based on the Utility Account Worksheet 2021 rates as presented within Schedule B.

ADMINISTRATIVE RECOMMENDATION:

1. That Council give Second Reading to Bylaw 1254.21, a bylaw to amend Schedule B of Bylaw 1250.20, water and wastewater rates for 2021 as option 1, as per the previously read bylaw.
2. That Council agrees to proceed with Third and Final Reading of Bylaw 1254.21, a bylaw to amend Schedule B of Bylaw 1250.20, water and wastewater rates for 2021 as option 1, as per the previously read bylaw.
3. That Council give Third and Final Reading to Bylaw 1254.21, a bylaw to amend Schedule B of Bylaw 1250.20, water and wastewater rates for 2021 as option 1, as per the previously read bylaw.

ALTERNATIVES:

- A) That Council give Second Reading to Bylaw 1254.21, a bylaw to amend Schedule B of Bylaw 1250.20, water and wastewater rates for 2021 as option 2, being a 0% increase, as per the 2020 rates.



**TOWN OF BLACKFALDS
COUNCIL MEETING
REQUEST FOR DECISION**

That Council agrees to proceed with Third and Final Reading of Bylaw 1254.21, a bylaw to amend Schedule B of Bylaw 1250.20, water and wastewater rates for 2021 as option 2, being a 0% increase, as per the 2020 rates.

That Council give Third and Final Reading to Bylaw 1254.21, a bylaw to amend Schedule B of Bylaw 1250.20, water and wastewater rates for 2021 as option 2, being a 0% increase, as per the 2020 rates.

B) That Council refer this Bylaw back to Administration for further review.

Attachments:

- *2021 truncated Utility Account Worksheet Rate Forecast*
- *Bylaw 1250.20 - Schedule B 2020 rates*
- *Bylaw 1254.21 to amend Schedule B to 2021 rates-option 1*

Approvals:

A handwritten signature in black ink, appearing to be "Myron Thompson", written over a horizontal line.

CAO Myron Thompson

A handwritten signature in black ink, appearing to be "P. Newman", written over a horizontal line.

Department Director/Author

Residential Utility Account Worksheet

Current Year

Description		2018 Utility Bill - Increase Sewer Consumption			Net Change	2019 Utility Bill - Regional Sewer Consumption			Net Change	2020 Utility Bill - Regional Sewer Consumption			Net Change	2021 Utility Bill - Regional Sewer Consumption			Net Change
		Rate	Units	Total	2018-2017	Rate	Units	Total	2019-2018	Rate	Units	Total	2020-2019	Rate	Units	Total	2021-2020
1-41-00-421	WATER - Base Rate for Operations (Fixed Costs)	\$ 16.40	1	16.40	0.32	\$ 16.73	1	16.73	0.33	\$ 17.06	1	17.06	0.33	\$ 17.40	1	17.40	0.34
1-41-00-420	WATER - Consumption Cost Recovery	\$ 2.61	18	46.98	0.90	\$ 2.66	18	47.88	0.90	\$ 2.72	18	48.96	1.08	\$ 2.77	18	49.86	0.90
1-41-00-422	WATER - Capital Infrastructure Funds	\$ 10.20	1	10.20	0.20	\$ 10.40	1	10.40	0.20	\$ 10.61	1	10.61	0.21	\$ 10.82	1	10.82	0.21
1-42-00-421	SEWER - Base Rate for Operations (Fixed Costs)	\$ 14.03	1	14.03	0.28	\$ 14.31	1	14.31	0.28	\$ 14.59	1	14.59	0.28	\$ 14.88	1	14.88	0.29
1-42-00-420	SEWER - Consumption Cost Recovery (80% of water consumption)	\$ 2.61	14.4	37.58	14.54	\$ 2.88	14.4	41.47	3.89	\$ 3.00	14.4	43.20	1.73	\$ 3.12	14.4	44.93	1.73
1-42-00-422	SEWER - Capital Infrastructure Funds	\$ -		-	9.63	\$ -	0	-	-	\$ -	0	-	-	\$ -	0	-	-
Total Charges				125.19	6.62			130.79	5.60			134.42	3.63			137.89	3.47
					4.92%				4.47%				2.77%				2.58%
		# Accounts	Months	Total	Net Change	# Accounts	Months	Total	Net Change	# Accounts	Months	Total	Net Change	# Accounts	Months	Total	Net Change
1-41-00-421	WATER - Base Rate for Operations (Fixed Costs)	3,500	12	688,800	64,574	3,800	12	762,888	74,088	3,850	12	788,172	25,284	3,900	12	814,320	26,148
1-41-00-420	WATER - Consumption Cost Recovery	3,500	12	1,973,160	184,334	3,800	12	2,183,328	210,168	3,850	12	2,261,952	78,624	3,900	12	2,333,448	71,496
1-41-00-422	WATER - Capital Infrastructure Funds	3,500	12	428,400	40,200	3,800	12	474,240	45,840	3,850	12	490,182	15,942	3,900	12	506,376	16,194
1-42-00-421	SEWER - Base Rate for Operations (Fixed Costs)	3,500	12	589,260	55,485	3,800	12	652,536	63,276	3,850	12	674,058	21,522	3,900	12	696,384	22,326
1-42-00-420	SEWER - Consumption Cost Recovery	3,500	12	1,578,528	1,041,880	3,800	12	1,891,123	312,595	3,850	12	1,995,840	104,717	3,900	12	2,102,630	106,790
1-42-00-422	SEWER - Capital Infrastructure Funds	3,500	12	-	373,788	3,800	12	-	-	3,850	12	-	-	3,900	12	-	-
Total Revenue Projections				5,258,148	1,012,686			5,964,115	705,967			6,210,204	246,089			6,453,158	242,954



SCHEDULE "B"

COMMERCIAL AND RESIDENTIAL WATER AND WASTEWATER RATES
(Rates Effective January 1, 2020)

WATER RATES

Each Owner shall pay for water services supplied to the Property owned by them, the aggregate of amounts determined as per below:

A. Minimum Rate: Fixed base rate as below:

The fixed base rate monthly charge shall be determined by the size of the meter supplied to each Owner as follows:

5/8" (16mm) and 3/4" (19 mm)	\$17.06 fixed rate
1" (25 mm)	Cost of 3/4" meter multiplied by 2.5
1 1/2" (38 mm)	Cost of 1' meter multiplied by 2.5
2" (50 mm)	Cost of 1 1/2' meter multiplied by 2.5
3" (75 mm)	Cost of 2' meter multiplied by 2.0
4" (100 mm)	Cost of 3' meter multiplied by 2.0

** For larger size service, multiplier to be determined by Administration.

B. Plus an Infrastructure rate: \$10.61

C. Plus a Consumption rate: \$2.72 per cubic meter of water measured

WASTEWATER RATES

Each Owner shall pay for wastewater services supplied to them, the aggregate of amounts determined as per below:

- A. Minimum Rate: \$14.59
- B. Plus an Infrastructure rate: \$0.00
- C. Plus a Consumption rate: \$3.00 per cubic meter at 80% of water measured.

The above monthly minimum rates will apply to all properties in Town that have water and/or wastewater services available in the land abutting the property.

GENERAL PROVISIONS

A deposit of no greater than three months estimated billing may be required at the discretion of the CAO.

The decision to sell bulk water to contractors, developers and private companies shall be at the discretion of the CAO and/or their delegate. If the Town of decides to sell bulk water, it will be at the rate established by the North Red Deer River Water Services Commission, plus an additional \$0.75 for every cubic meter. A minimum charge of \$110.00 per sale will apply to all bulk sales.



**TOWN OF BLACKFALDS
BYLAW 1254.21**

**BEING A BYLAW OF THE TOWN OF BLACKFALDS, IN THE PROVINCE OF ALBERTA,
TO AMEND UTILITY BYLAW 1250.20, TO REGULATE THE SUPPLY AND USE OF
WATER, WASTEWATER, AND STORMWATER UTILITIES FOR THE TOWN OF
BLACKFALDS**

Being a Bylaw of the Town of Blackfalds to provide for the supply and use of water, wastewater and stormwater utilities in the Town of Blackfalds:

WHEREAS Part 1, Section 3 of the Municipal Government Act, RSA 2000, c. M-26, provides that one purpose of a municipality is to provide services, facilities or other things that are necessary or desirable for all or part of the municipality;

WHEREAS Part 2, Division 1, Section 7 of the Municipal Government Act, RSA 2000, c. M-26 provides a Municipal Council with the authority to pass bylaws respecting safety, health and welfare of people and protection of people and property, services provided by, or on behalf of, the municipality, public utilities and enforcement of bylaws;

WHEREAS Part 2, Division 1, Section 8 of the Municipal Government Act, RSA 2000, c. M-26 provides a Municipal Council with the authority to regulate or prohibit and provide for a system of licenses, permits and approvals;

NOW THEREFORE THE MUNICIPAL COUNCIL OF THE TOWN OF BLACKFALDS, IN THE PROVINCE OF ALBERTA, DULY ASSEMBLED, ENACTS AS FOLLOWS:

Bylaw 1254.21 is hereby amending "SCHEDULE "B" RATES" of the Utility Bylaw 1250.20 of the Town of Blackfalds for billing purposes as attached.

DATE OF FORCE

1. That this Bylaw shall come into effect upon the date on which it is finally read and passed.

READ for the first time this _____ day of A.D., 202__.

(RES. _____)

MAYOR RICHARD POOLE

CAO MYRON THOMPSON

READ for the second time this _____ day of A.D., 202__.

(RES. _____)

MAYOR RICHARD POOLE

CAO MYRON THOMPSON

READ for the third time this _____ day of A.D., 202__.

(RES. _____)

MAYOR RICHARD POOLE

CAO MYRON THOMPSON



TOWN OF BLACKFALDS BYLAW 1254.21

SCHEDULE "B"

COMMERCIAL AND RESIDENTIAL WATER AND WASTEWATER RATES

(Rates Effective January 1, 2021)

WATER RATES

Each Owner shall pay for water services supplied to the Property owned by them, the aggregate of amounts determined as per below:

A. Minimum Rate: Fixed base rate as below:

The fixed base rate monthly charge shall be determined by the size of the meter supplied to each Owner as follows:

5/8" (16mm) and 3/4" (19 mm)	\$17.40 fixed rate
1" (25 mm)	Cost of 3/4" meter multiplied by 2.5
1 1/2" (38 mm)	Cost of 1' meter multiplied by 2.5
2" (50 mm)	Cost of 1 1/2' meter multiplied by 2.5
3" (75 mm)	Cost of 2' meter multiplied by 2.0
4" (100 mm)	Cost of 3' meter multiplied by 2.0

** For larger size service, multiplier to be determined by Administration.

B. Plus an Infrastructure rate: \$10.82

C. Plus a Consumption rate: \$2.77 per cubic meter of water measured

WASTEWATER RATES

Each Owner shall pay for wastewater services supplied to them, the aggregate of amounts determined as per below:

- A. Minimum Rate: \$14.88
- B. Plus an Infrastructure rate: \$0.00
- C. Plus a Consumption rate: \$3.12 per cubic meter at 80% of water measured.

The above monthly minimum rates will apply to all properties in Town that have water and/or wastewater services available in the land abutting the property.

GENERAL PROVISIONS

A deposit of no greater than three months estimated billing may be required at the discretion of the CAO.

The decision to sell bulk water to contractors, developers and private companies shall be at the discretion of the CAO and/or their delegate. If the Town of decides to sell bulk water, it will be at the rate established by the North Red Deer River Water Services Commission, plus an additional \$0.75 for every cubic meter. A minimum charge of \$150.00 per sale will apply to all bulk sales.



**TOWN OF BLACKFALDS
STANDING COMMITTEE MEETING
REQUEST FOR DIRECTION**

MEETING DATE: January 18, 2021

ORIGINATED BY: Sean Barnes, Director of Community Services

SUBJECT: Cheemo Club Lease Agreement Extension

BACKGROUND:

The Cheemo Club welcomes residents 50+ to join in weekly activities at the Blackfalds Community Centre. The current Cheemo Club lease agreement expired December 31, 2020. With current pandemic restrictions continuing, the Town of Blackfalds and Cheemo Club have agreed to an amendment with a 24-month extension of the current lease.

During the January 28, 2020 Regular Council Meeting, executive members Jeanette Edwards and Daryl Calder presented to Council a list of concerns they have regarding their senior space. They were invited to attend the February 5, 2020 Blackfalds Recreation, Culture and Parks Board meeting to discuss the concerns that were brought up at the council meeting. A sub-committee was created in order for the Cheemo Club and the Town of Blackfalds to get together and discuss the concerns and create some goals in order to make co-existing easier.

The Town of Blackfalds, specifically Cara Kroetsch FCSS Volunteer Programmer and Blackfalds Councillor Will Taylor, have been working closely with the Cheemo Club in building relationships so the municipality can better support the group for future planning opportunities and growth.

The proposed extension was discussed with the Cheemo Club executive members in December, who were in support of the 24-month extension of the current lease.

DISCUSSION:

On January 6, 2021, the Cheemo Club Lease Agreement Extension was brought forth to the Recreation, Culture and Parks Board meeting. No concerns regarding the extension were voiced and the Board voted to carry the motion unanimously.

RES. 05/21

Member Shepherd moved that the Recreation, Culture, and Parks Board accept the amended lease agreement and to bring it forward to Council for approval.

MOTION CARRIED UNANIMOUSLY

FINANCIAL IMPLICATIONS:

Annually the municipality provides the Cheemo Club with an operating grant of \$1,100.



**TOWN OF BLACKFALDS
STANDING COMMITTEE MEETING
REQUEST FOR DIRECTION**

ADMINISTRATIVE RECOMMENDATION:

1. That the Standing Committee of Council direct Administration to extend the existing Cheemo Club Lease Agreement for an additional 24-month period.

ALTERNATIVES: *(other than the recommendation)*

- A) That Council sends this item back to Administration for further discussion

Attachments:

- *Cheemo Club Lease Agreement*

Approvals:

CAO Myron Thompson

Department Director



THIS AMMENDED LEASE AGREEMENT made this 1st day of September, 2017

To amend January 1st, 2012 Lease Agreement

BETWEEN

The **TOWN OF BLACKFALDS**

(Herein after called The Town)

And

The **BLACKFALDS SENIORS CHEEMO CLUB**

(Herein after called The Cheemo Club)

ARTICLE 1 - DEFINITIONS

- a. "Building," means the Demised Premises comprising of the Blackfalds Seniors Centre home of The Cheemo Club pursuant to the terms of this lease agreement.
- b. "Commencement Date" for this amended agreement means the 1st day of September, 2017.
- c. "Demised Premises" means the property set forth and described in the lease herein.

ARTICLE 2 - THE DEMISE

- a. Subject to the conditions and agreements hereinafter reserved and contained, The Town does hereby demise and lease unto The Cheemo Club the Demised Premises known as the Multi-Purpose Room at the Blackfalds Community Centre located at 4810 Womacks Road, Blackfalds.

ARTICLE 3 - TERM

- a. To have and to hold the Demised Premises from the original commencement date for a term of September 1st, 2017 and ending December 31, 2020.
- b. An annual review will be held in September for the term of the lease.

ARTICLE 4 - RENT

- a. Payment of Rent
 - a. During the term as and from the Commencement Date a minimum rent of \$ 39,900.00.
- b. Variation of Rent
 - a. The Cheemo Club acknowledges and agrees that the aforesaid minimum rent payments are based on:
Square footage rental rates for the term of this Agreement at \$15.96 per square foot.
- c. Goods and Services Tax
 - a. The Cheemo Club is exempt from the Goods and Services Tax.
- d. Examination and Possession
 - a. The Cheemo Club has had possession of the Demised Premises from September 1, 2017.

ARTICLE 5 - THE CHEEMO CLUB COVENANTS

The Cheemo Club covenants with the Town as follows:

- a. Rent
 - a. To pay the rent in one instalment upon receipt of the annual facility-operating grant from The Town, which shall be not less than the annual rent.
- b. Assignment
 - a. Not to, without leave in writing first had or obtained, assign or sublet or part with the possession of the Demised Premises.
- c. No Nuisance
 - a. Not to do or omit to be done anything in respect of the Demised Premises the doing or omission of which shall be or result in a nuisance.
- d. Insurance
 - a. Provide evidence of insurance for extended coverage and malicious damage insurance, liability insurance covering The Cheemo Club in respect to the Demised Premises and its operation with limits of not less than Two Million (\$2,000,000) Dollars inclusive for injuries to or death of persons to property, and such insurance shall name The Town as an additional insured. Fire insurance on the Demised Premises and on the leasehold improvements and equipment located in the Demised Premises.
- e. Indemnity to The Town
 - a. Unless caused by the negligence of The Town, The Cheemo Club will indemnify and save harmless The Town from and against any and all

liabilities, damages, costs, expenses, causes of action, actions, claims, suits and judgements which The Town may incur or suffer or be 'put to by any reason of or in connection with or arising from;

- b. Any breach, violation or non-performance by The Cheemo Club of any covenant, condition or agreement as set forth in this lease.
- c. Any damage to the property of The Cheemo Club, howsoever occasioned by the condition, use, occupation or maintenance of the Demised Premises.
- d. Any injury to any person, including death, resulting at any time there from occurring in or about the Demised Premises and the lands.
- e. Any wrongful act or neglect by The Cheemo Club.
- f. Inspection
 - a. That during the term any person or persons may inspect the Demised Premises and all parts thereof at all reasonable times on producing a written order to that effect signed by The Town.
- g. Signs
 - a. The Cheemo Club may erect and maintain an identification sign of a type approved and/or designated by The Town and shall not erect or install any signage without first obtaining approval from The Town.
- h. Maintenance and Janitorial
 - a. The Town will maintain at its own expense the interior of the Demised Premises and every part thereof in good order and condition and to make promptly all needed repairs and replacement, reasonable wear and tear and damage of fire, lightning and tempest only excepted, and (without limiting the foregoing) to keep the Demised Premises well painted, clean and in such condition as a careful owner would.
 - b. The Cheemo Club and Town have established the level of service of the janitorial and custodial at time of contract offering.
- i. Liens
 - a. Not to suffer or permit during the term of this lease any builder's or other liens for work, labour, service or materials ordered by The Cheemo Club or for the cost of which The Cheemo Club may in anyway be obligated, to attach to the Demised Premises or any portion thereof, or to any improvements erected upon same, and that whichever and so often, if ever, as any such liens or liens shall be filed or shall attach, The Cheemo Club will within thirty days thereafter either pay the same or procure the discharge thereof by giving the security or in such a manner as is or may be repaired or Permitted by law. The Cheemo Club will indemnify and save harmless The Town from any and all claims in respect to any such work, labour, services or materials.
- j. Use of Demised Premises
 - a. That The Town shall use the Demised Premises as required for operations and for the purpose of operating and conducting Senior's services and The

Cheemo Club at its discretion may offer space to Cheemo Club members for a fee to be determined by The Cheemo Club and paid to The Cheemo Club which must be booked through Guest Services at the Abbey Centre.

- k. Alterations
 - a. Notwithstanding anything contrary in this lease, The Cheemo Club will not make to, or erect in the Demised Premises any installation, alterations, addition or partitions without having received approval of The Town.
 - b. The Cheemo Club will construct any installations, alterations, additions and partitions only in accordance with the approved plans and specifications and in a good and workman like manner and will proceed diligently to completion. Only contractors, subcontractors and trades people approved by The Town will do all such completion.

ARTICLE 6 - TOWN COVENANTS

The Town covenants with The Cheemo Club as follows:

- a. Quiet Enjoyment
 - a. That the Cheemo Club shall and may peaceably and enjoy the said Demised Premises for the term hereby granted without interruption, hindrance or disturbance by The Town or any other person or persons claiming under him.
- b. Repairs
 - a. To repair or replace any part of the building found to be defective by any reason of design, materials, or workmanship.
- c. Parking
 - a. The Cheemo Club will be entitled to the use of any parking area or areas situated within or upon the Demised Premises, provided that such parking areas shall be used at the sole risk of The Cheemo Club.

ARTICLE 7 - MUTUAL AGREEMENTS

And it is hereby agreed between The Town and The Cheemo Club as follows:

- a. Default and Termination
 - a. In case of default or termination without the written consent of The Town then current and the next ensuing three months shall immediately become due and payable, and, at the option of The Town, this lease shall cease and immediately become void, and The Town may re-enter and take possession of the Demised Premises as if The Cheemo Club or any occupant of the Demised Premises were holding over after the expiration of the term without right.
- b. Entry to View Repairs
 - a. The Town may at all reasonable times during the term enter the Demised Premises to inspect the condition thereof.

- c. Exclusion of the Town's Liability
 - a. The Town shall in no event whatsoever be liable or responsible in any way for personal injury or death of any employee or volunteer of The Cheemo Club, or any person who may be upon the Demised Premises, or for the loss or damage or injury to any property belonging to The Cheemo Club or to its employees or to any other person whose property is on the Demised Premises.
- d. Facility Reservation Procedure
 - a. In January, May and September of each year The Cheemo Club will provide The Town with a calendar displaying those periods for which The Cheemo Club has exclusive use of the Demised Premises. The Town will coordinate the reservation of available times through its facility reservation system and will advise The Cheemo Club of all reservations made so as to ensure no duplication. The Cheemo Club will, in turn notify The Town of any additional time reserved beyond that originally provided.

The Town will provide an annual operating grant of \$1100.00 with a payment of \$550.00 paid to The Cheemo Club every January and June.

 - a. The Town will establish annual Fees and Charges.
 - b. The Town will be responsible for security, the training and issuance of key fobs for entry and exit.
- e. The Town May Pay Taxes or Charges on Default of The Cheemo Club
 - a. If The Cheemo Club fails to pay when due any taxes, rates, insurance premiums, or charges which it has herein covenanted to pay, The Town may pay any such taxes, rates, premiums or charges, and may charge the sums so paid to The Cheemo Club who shall pay them forthwith on demand; The Town, in addition to all other rights, shall have the same remedies and may take the same steps for recovery of all such sums as it might have taken for the recovery of rent in arrears under the terms of this lease; all arrears of rent and any monies by The Town hereunder shall bear interest at the rate of 24% per annum from the time such arrears become due until paid to The Town.
- f. Utilities and Maintenance
 - a. The Town will pay as they become due all charges for public services and utilities, including water, gas electrical power or energy, steam or hot water used in respect of the demised premises and for the fitting, machines, apparatus, meters or other things leased in respect thereof, and for all work or services performed by a corporation or commission in connection with such public services; provided that in the event of any such public services or utilities, the equitable share of The Cheemo Club is to be in the sole and absolute discretion of the Town.
- g. Fixtures
 - a. With the consent of The Town, The Cheemo Club may affix or erect any lawful improvement, fixture or fitting on 'the Demised Premises at The Cheemo Club's own risk and expense.

- h. Damage to Demised Premises
 - a. If and whenever the Demised Premises are destroyed or damaged by fire or other casualty against which The Town is insured, so as to be totally unfit for occupancy, rent will abate until the Demised Premises are repaired or rebuilt. If and whenever the Demised Premises are damaged by fire or other casualty against which The Town is insured, and the damage is such that the Demised Premises can be partially used, then until such damage is repaired basic rent will abate by the same proportion as the area of the part of the Demised Premises rendered unfit for occupancy is of the whole of the Demised Premises. The Town with reasonable diligence will repair and restore the Demised Premises unless The Cheemo Club is obliged to repair hereunder.
 - b. If the Demised Premises are damaged or destroyed by any cause whatsoever and if, in the opinion of The Town, reasonably arrived at, the Demised Premises cannot be rebuilt or made fit for the purposes of The Cheemo Club within ninety days of the damage or destruction, The Town, at its option, may terminate this Lease by giving The Cheemo, within thirty days after such damage or destruction, a Notice of Termination and thereupon basic rent will be apportioned paid to the date of the damage or destruction and The Cheemo Club will immediately deliver up possession of the Demised Premises to The Town.
- i. Interpretation
 - a. Words importing the singular number only shall include the plural, and vice versa, and words importing the masculine gender shall include the feminine gender, and words importing persons shall include firms and corporations and vice versa.
- j. Notices
 - a. Any notice given by The Cheemo Club shall be sufficiently given if mailed by registered mail, postage pre-paid, addressed to The Town.
 - b. Any notice given by The Town shall be sufficiently given if mailed by registered mail, postage pre-paid, addressed to The Cheemo Club.
- k. Governing Law
 - a. This Lease will be construed and governed by the laws of the Province of Alberta.

ARTICLE 8 - FURTHER COVENANTS OF THE TOWN

- a. The Town, so long as The Cheemo Club is not in breach of any of the covenants set forth herein to be performed by The Cheemo Club, shall not sell or otherwise dispose of the Demised Premises or any interest therein to any other third party, without the consent of The Cheemo Club.

IN WITNESS WHEREOF this lease has been executed on the day and year first above written.

The Town of Blackfalds

Per: _____

Per: _____

The Blackfalds Seniors Cheemo Club

Per: _____

Per: _____



**TOWN OF BLACKFALDS
STANDING COMMITTEE OF COUNCIL
REQUEST FOR DIRECTION**

MEETING DATE: January 18, 2021

ORIGINATED BY: Terry Topolnitsky – Planning Manager

SUBJECT: Safety Codes Services Draft Request for Proposal

BACKGROUND:

In May of 2008, an initial contract between the Town and IJD Inspections Ltd was signed for a term of 3 years for all disciplines including electrical, plumbing, gas, heating and building codes. Since that time IJD has been our contracted Safety Codes Services provider.

On April 9, 2019 Council was presented an administrative recommendation to consider the renewal of the Safety Code Services Agreement with IJD Inspections. The current contract was scheduled to conclude in May of 2019, with an option to extend for a two-year time frame.

RES. 117/19

Councillor Olfert moved that Council direct Administration to extend the Safety Code Services agreement with IJD Inspections for a period of two years.

CARRIED UNANIMOUSLY

The agreement was signed with IJD with an expiry of May 1, 2021.

DISCUSSION:

As per the current Council's direction, any RFPs that may impact service levels of our residents, are to be brought forward to the Standing Committee of Council for input and feedback prior to the RFP being finalized and posted by Administration. As such, Administration has attached a new draft request for proposal for qualified Safety Code Service firms to provide services tailored to meet our current and future requirements for 3 years plus another optional 2 years extension.

Administration has completed this task including review of other similar sized municipal Safety Code Service RFPs of this nature, and updating the document to include all relevant information as required by the Alberta Safety Codes Council (it is noted that the submitted RFP mirrors the standards set by the Alberta Safety Codes Council).

The expected work includes providing Safety Code services, as needed, for items including but not limited to:

- Review and consultation with Town staff on Safety Code policies, procedures, and advice regarding regulatory compliance
- Building permit review and related inspections
- Review, acceptance, and issuance of Electrical, Plumbing, Heating, and



**TOWN OF BLACKFALDS
STANDING COMMITTEE OF COUNCIL
REQUEST FOR DIRECTION**

related permits

- Inspections as regulated under the Alberta Building Codes
- Assistance with all annual Alberta Safety Code Council Audits

If this draft RFP is approved tonight, it will be advertised on Alberta Purchasing Connection (APC), the Town's website and through invitation to service providers within the region and will close around February 26, 2021. We welcome the Committee's feedback and comments.

FINANCIAL IMPLICATIONS:

None, the Safety Code fees, for 2021 will be established through the RFP based on the allotted percentages submitted as part of the RFP. All fees are dependent on the dollar value of construction and value of other services as applied.

ADMINISTRATIVE RECOMMENDATION:

That the Standing Committee of Council move to recommend that Administration release the Safety Code Services RFP on Alberta Purchasing Connection, the Town's Website and by invitation to current service providers within the region.


ALTERNATIVES:

- A. That Council approve the draft RFP for Safety Code Services as appended.
- B. That Council refer back to Administration for more information.

ATTACHMENTS:

- *Draft RFP for Safety Code Services*

Approvals:



CAO Myron Thompson



Department Director/Author



**Request for Proposal:
Safety Codes Services, All Inspection Disciplines
For the Town of Blackfalds**

Closing Location:

Civic Cultural Centre
5018 Waghorn Street
Blackfalds, AB T0M 0J0

Closing date and time:

February 26, 2021
3:30 PM. Mountain Standard Time

General Contact Person:

Terry Topolnitsky, Manager of Planning and Development
Phone: 403-885-6237
terry@blackfalds.com

**Town of Blackfalds
Box 220
Blackfalds, AB
T0M 0J0**

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1.0 INVITATION TO SUBMIT PROPOSAL

Your organization is hereby invited to submit a proposal for the provision of Safety Codes Services in the all Safety Code disciplines to the Town of Blackfalds, as set out in this Request for Proposal documentation.

Request for Proposal: #2021.02.01
Description: Safety Codes Services in the All Disciplines
Date Issued: February 1, 2021
Closing Date: February 26, 2021
Closing Time: 3:30 P.M. (local time as conclusively and solely determined by the clock located on the telephone system of the Town of Blackfalds)
Public Opening: No

Please indicate Request for Proposal Number and description on all correspondence.

This Request for Proposal does not commit the Town to award a contract or pay any costs incurred in the preparation of a proposal, or attendance at a meeting with Town staff.

2.0 PROPONENTS QUESTIONS

Questions can be directed to the Director of Operations and Engineering Services or Planning and Development Manager prior to bid submission.

3.0 INSTRUCTION TO PROPONENTS

3.1 Inquiries

Refer all proposal inquiries to Terry Topolnitsky, Planning and Development Manager by facsimile at (403) 885-6237 or email at terry@blackfalds.com . All written inquiries and the replies thereto will be copied to all proponents.

3.2 Proposal Return

Request for Proposal submissions shall be sealed and enclosed in envelopes or containers marked with the Request for Proposal number and addressed to:

Town of Blackfalds
Box 220
Blackfalds, Alberta T0M 0J0
Attention: Terry Topolnitsky, Planning and Development Manager

Proposals must be received at the front reception desk, lower level of the Town Office at the predetermined time and date set forth or they will not be accepted for this particular Request for Proposal. Proposals received late will not be accepted for consideration.

Faxed bids **will not** be accepted nor considered. Any bids that are received via facsimile will be returned by mail to the proponent.

The Town of Blackfalds is not responsible for the timeliness of documents delivered nor will the Town accept any proposal delivered to a location other than the Reception Desk at the above-specified address.

3.3 Proposal Copies

The Proponent shall provide one (1) original of the proposal, three (3) copies of their proposal, and a copy of the proposal on a readable CD. The proposal shall be prepared in Microsoft Office Professional.

3.4 Proposal Format

Proponent's submission must be prepared in the same format in which this RFP has been prepared, to allow the Town to make direct comparisons between proponent's bids. This requirement applies, in particular, to this section – proposal format and Section 4 – Scope of Work.

1. Letter of Transmittal

A Letter of Transmittal or covering letter, dated and signed by an official authorized to negotiate, make commitments, and provide any clarifications with respect to the proposal on behalf of the vendor.

2. Executive Summary

An Executive Summary, touching on pertinent points in the proposal you may want to highlight.

3. Corporate Profile

A brief corporate profile which will cover the organization's history, philosophy, office location, and proof that the organization is in good standing with the Safety Codes Council and the Worker's Compensation Board must be submitted.

4. Response to Requirements

Proponents are required to detail their organization's ability to satisfy, at minimum, all aspects of the requirements as outlined in the "Scope of Work". Proponents are also required to review, in detail, Section 5.0 Special Provisions and Section 8.0 General Terms and Conditions, to ensure that obligations and requirements required under this section are also met.

5. Project Team

Proponents must provide resumes for the Safety Codes Officers and permit issuers who will be assigned to provide Safety Codes services in the Town of Blackfalds. Resumes must include, for each SCO and permit issuer:

- their level of accreditation, certification and designation
- background and training,
- years of experience,

- experience in similar municipalities
- experience, if any, specifically in Town of Blackfalds in any or all of the three disciplines, and

Proponent's bids must include any agencies or organizations to which work will be sub-contracted. If this is applicable, the same information that is required above will be required for the sub-contracting agency or organization's SCOs and permit issuers.

Proponent's bids must include resumes for any other organization employees (i.e. clerical) who will be involved in providing Safety Codes Services for the Town of Blackfalds on a day-to-day basis.

6. References

The Proponent shall include two (2) municipal references with their proposal package. References shall include the name of the municipality, a contact person complete with title, phone number and e-mail address. The references must reflect municipalities for whom similar Safety Codes services are being provided.

7. Certification

All proponents responding to this Request for Proposal are required to sign the certification under Section 10. **Failure to complete, sign and submit the certification may disqualify the proposal as described under Section 8 – General Terms and Conditions, Item 14.**

4.0 SCOPE OF WORK

1. Statement of Intent

The Town of Blackfalds wishes to implement Safety Codes Services in all disciplines by entering into a contract with an organization that can provide these services in the Town of Blackfalds under the appropriate authority from the Safety Codes Council.

2. Uniform Service Delivery Standard

Proponent's bids will be based on the Uniform Quality Management Plan (QMP) attached and forming part of this Request for Proposal (RFP).

3. Background

The Town of Blackfalds is an urban municipality of more than 10,000 people. The Town is located in the County of Lacombe, north of the City of Red Deer.

The Town is positioned for growth and it is anticipated that excellent growth will continue within the foreseeable future.

At the present time, Town of Blackfalds has accreditation for all sections of Part 9 of the Safety Codes Services.

The Town of Blackfalds planning framework is similar to other municipalities in that it does require development permits for all development. Proponents will need to familiarize themselves with the Town's Land Use Bylaw (Available on-line) to ensure a seamless transition in providing Safety Codes Services to the Town.

4. Corporate Disclosure

Proponents should describe any legal proceedings that they have been or are currently involved in. The description should include the nature of the proceedings and the outcome, if known.

5. Liaison

The successful proponent will liaise with the Planning and Development Services department. The prime contacts will be the Development Officers and the Planning and Development Clerk.

6. Service Levels

Proponent's bids must explain, in detail, how Safety Codes services will be provided in Town of Blackfalds. This includes but not limited to:

- a) The proponent's knowledge and understanding of Town of Blackfalds and the Safety Codes services that is required in the Town now.
- b) A schedule of attendance:
 - i. At the Town office to meet with ratepayers, contractors and others who need face-to-face information and assistance with Safety Codes issues from a Safety Codes Officer.
 - ii. Site inspections in each discipline including maximum timelines for inspections must meet timelines as set out in the Town QMP.
- c) Contact information and a toll-free telephone number for ratepayers, contractors and others who otherwise need information and assistance with Safety Codes issues from a Safety Codes Officer.
- d) How the proponent will make Safety Codes Officers and other support staff (i.e. safety codes clerk) available for consultation with other Town departments including but not limited to the Planning and Development Officer, and also the Fire Chief, Assessment Services, Engineering Services, as and when required.
- e) How the proponent, working with Planning and Development Services staff, will ensure that all development in Town of Blackfalds obtains the required Safety Codes permits, especially single family dwellings.
- f) How the proponent will ensure that its services are properly integrated with specific Town of Blackfalds development requirements, including but not limited to deemed approved single family dwellings, sprinkler requirements in serviced residential development, and Town of Blackfalds' restrictions in new and existing subdivisions.

- g) How the proponent will provide services during peak demand periods or in the event of the suspension, termination or loss by some other means of one or more Safety Codes Officers providing services on a regular basis in the Town.
- h) How the proponent will undertake the quality monitoring and enforcement action if necessary.
- i) How will the transition of Safety Code services to the agency are handled.

7. Fee Schedule

Proponent's bids must include proposed fees for electrical, plumbing, heating and gas permits.

This is to include a 're-call fee" due to a second no entry result, if applicable.

8. Fees, Other Charges and Payments

- a) The Town of Blackfalds will collect all building permit fees. Proponent's bids must specify what percentage of the permit fees they will require to provide Safety Codes services in the Town if permits are issued by the Town or if issued by the Proponent.
- b) Proponent's bids must specify what Safety Codes–related services will be provided over and above regular, day-to-day inspection and permits issuance.
- c) Proponent's bids must also specify what additional charges may be incurred by the Town for services over and above contracted requirements.
- d) Proponent supplied Safety Codes Clerk to the Town for the Town to cover off vacation or due to extenuating circumstance.
- e) Proponent's bids must include a proposed payment schedule.

9. Training / Orientation

Proponent's bids must include proposals for training, at the proponent's cost, including but not limited to:

- a) Continued training and support for the Planning and Development Clerk for the Planning and Development Department with respect to the issuance of permits, E-Site and the proponent's service delivery model and methodologies, etc.
- b) Orientation for the remaining members of the Planning and Development services department, the Town Fire Chief, Assessment Services and

Engineering Services with respect to the Safety Codes Act, the issuance of permits process, etc.

- c) Training for the proponent's Safety Codes Officers and other organization employees with respect to Town of Blackfalds' QMP and planning system.
- d) Training to ensure that the proponent's Safety Codes Officers and other organization employees receive all professional development and educational upgrades necessary to maintain their certification and designation, receive necessary training in Standatas and other relevant bulletins as they are issued, and any other training or education that the Town of Blackfalds deems necessary.

10. Contract

- a) The term of the contract between the Town of Blackfalds and the successful bidder will be three (3) years, with an option for a two (2) year extension if mutually agreed upon by both parties.
- b) The contract between Town of Blackfalds and the successful bidder will include a clause that provides for mutual discussions and resolutions between the two parties on any emergent issues impacting the agreement and/or the fees collected.

11. Timeline

The Town of Blackfalds has targeted to be ready to provide Safety Codes services in the disciplines by May 1, 2021. Proponent's bids must be prepared on this basis.

12. Data Management

The preferred database of record for the management of information related to Safety Codes services is the E-Site system. The Town of Blackfalds will use E-Site for storage and retrieval of Safety Codes information, and for issuance of Safety Codes permits. Equivalent database programs may be considered in addition to the use of the E-Site System.

5.0 SPECIAL PROVISIONS

In addition to the General Terms and Conditions in Section 6 the following will also apply in the event actual Contract documents are drawn up:

5.1 Letter of Irrevocable Credit/Guarantee

- 1. The successful proponent will be required to provide to the Town an irrevocable unconditional Letter of Credit or a Letter of Guarantee meeting all of the same criteria, hereinafter referred to as the "Letter of Credit". The Letter of Credit shall be in a form and from a financial institution acceptable to the Town and payable to the Town upon presentation.

2. The Letter of Credit shall remain valid throughout the term of the contract and shall not expire until such time that the Town deems that all services have been satisfactorily completed.
3. The Town may call for payment under the Letter of Credit if but not limited to:
 - a) there has been default by the contractor due to non performance or inadequate performance by the Agency of the Services
 - b) the Agency has not performed the Services to the satisfaction of the Town
 - c) issuance of excessive or unsubstantiated orders or abuse of powers
 - d) non-conformance with the Act, the Regulation, or the Permit Regulation or any other regulations passed pursuant to the Act
 - e) an inability to provide effective and appropriate Services
 - f) the value of the Letter of Credit shall be \$25,000.

The Letter of Credit will be submitted to the Town within fifteen (15) days after the execution of the contract.

5.2 Insurance

1. Comprehensive or Commercial General Liability in an amount of not less than one million (\$1,000,000.00) inclusive per occurrence insuring against bodily injury or damage to property of others (including loss of use thereof) and such policy shall include a Cross Liability clause and Contractual Liability coverage.
2. All Risks Liability to include Valuable Paper and Records Insurance on all such items pertaining to the Services in an amount adequate to enable their reconstruction.
3. All insurance certificates will be submitted to the Town within fifteen (15) days after the execution.

5.3 Business License

1. As per Section 7: Item 2.0, the successful proponent will be required to obtain a Town of Blackfalds Business license wherein the Proponent will be required to provide an applicable business license number prior to receipt of any payment.

Town of Blackfalds Business license number _____

6.0 EVALUATION

Proposals will be evaluated in three stages.

The first stage will consist of a review of all proposals to ensure that each proposal was received on time, that the certification is properly completed and signed, and that the proposal is compliant with all other submission requirements. Proposals found to be non-compliant will be returned and given no further consideration.

The second stage will consist of an evaluation of the written proposal, which the evaluation team will rate based on the following criteria:

Service Levels	25%
Project Team	20%
Fee Split	15%
Corporate Profile	5%
Proposal Quality (i.e. layout, readability, adherence to bid format requirement, etc.).	5%
Corporate Disclosure	5%
Training	5%
Database Management	5%
References & Interview – third stage	15%

For the third stage, a short list of proponents will be invited to attend an interview at the Town Office. The project team, as identified in Section 3.4.5 and Section 4.4.3, must attend this interview. The focus of this interview will be on the experience and “fit” that the project team can bring to Town of Blackfalds with respect to working with Town ratepayers, Council, Administration, and contractors in providing Safety Codes Services in Town of Blackfalds.

7.0 APPROVAL PROCESS

After the third stage, the proposals will be ranked in the sole and unfettered discretion of the Town in order from the proposal considered most advantageous to the Town to the proposal considered least most advantageous. Thereafter, Town Administration will make a recommendation to Town Council to commence negotiations of a contract with the proposal considered most advantageous. In the event that Town Council votes to direct same, Administration will commence negotiations of a contract based on the RFP with the proponent deemed most advantageous. In the event that Administration is unable to negotiate such a contract, Administration may elect to terminate such negotiations, and commence negotiations with the proposal deemed next most advantageous to the Town.

8.0 General Terms and Conditions

1.0 SCOPE

These Terms & Conditions form a part of each RFP of Town of Blackfalds, or any group associated with the Town of Blackfalds, which is stated to be subject to the Town of Blackfalds Terms & Conditions: Materials and Supplies. Accordingly, such Terms & Conditions shall form a part of each Contract created by the acceptance of a Proposal relating to such RFP.

2.0 DEFINITION OF TERMS

Whenever used in the Request for Proposal, including any forms to be included as part of any proposal, the following words shall be deemed to have meanings as indicated below:

"Business License" means a Town of Blackfalds Business License as required by Town of Blackfalds' Business License Bylaw.

"Closing Time" means the "Closing Time" specified in the RFP.

"Contract" means the agreement(s) entered into by the County with the successful Proponent(s) for the goods, services or goods and services described in the RFP.

"Control" means that the Town has the authority to manage the Record, including its creation, use, disclosure and disposal.

"Custody" means that a party has physical possession of the Record.

"FOIP Act" means the Alberta Freedom of Information and Protection of Privacy Act.

"Owner" means Town of Blackfalds.

"Proponent" means a person, firm or company submitting a proposal to the Town of Blackfalds pursuant to the RFP.

"Proposal" means the offer of a Proponent to furnish materials, supplies or services in response to an RFP.

"Record" means information in any form, including proposals, reports, documents, drawings (computer generated or otherwise), specifications, photographs, letters, meeting minutes, vouchers and all other correspondence, papers and any other information that is written, photographed, recorded or stored in any manner, but does not include the software or any mechanism that processes such Records.

"RFP" means this Request for Proposal of the Town of Blackfalds, including all forms to be included as part of any proposal.

"Sites" means all lands, buildings and premises where goods are to be delivered or services performed.

"Town" means the Town of Blackfalds

"Transitory Record" is one that:

- has only temporary usefulness,
- is not subject to legislated retention,
- is not required for operational purposes once its immediate purpose has been served.

Examples of Transitory Records are:

- a) Temporary information that can be destroyed once acted upon, (i.e. phone messages, routing slips, diaries, opened envelopes, and informal notes of little consequence)
- b) Duplicate documents when nothing substantive has been added, changed or deleted; the copy was created for convenience of reference purpose; and the master Record is kept on file for the retention period, (i.e. copies of minutes,

- c) Draft documents and working materials are those Records used to prepare the master Record that is on file, (i.e. rough notes, preliminary drafts, dictating tapes, etc.)

Exceptions to a), b), and c) above are respectively:

- When substantive information is recorded, (i.e. when a date stamped envelope is proof of receipt).
- When substantive information is recorded on a copy; where copies of documents go to different units for different uses, (i.e. a multi-part form); or when the master Record is not on a file.
- When draft documents have value in substantiating or providing background material for the master Record, such as audit working papers.

"Vendor" means a Proponent to whom a Contract is awarded by the Town for any or all of the goods and services described in the RFP.

3.0 PROPOSAL CONDITIONS

Proponents shall carefully read the Request for Proposal documentation and submit proposals subject to all conditions contained in the proposal documents. Proponents shall make all investigations necessary for estimating as to the conditions under which the work must be carried out and its nature and location. The submission of a proposal by a Proponent shall be construed by The Owner to mean that the Proponent agrees to abide by and carry out all conditions set forth in the proposal documents.

4.0 PROPOSAL CLARIFICATION

Should the Proponent find, during examination of the proposal documents, any discrepancies, omissions, ambiguities, or conflicts on or between the proposal documents or be in doubt as to their meaning, the Proponent shall bring the question to the attention of the person noted, via facsimile only, not less than three (3) days before the proposal closing time. The questions will be reviewed, and where information sought is not clearly indicated, The Owner will issue addenda, which will become part of the proposal documents. Should the Proponent fail to bring the discrepancy, omission, ambiguity or conflict to the attention of The Owner within the aforesaid time, the Proponent shall accept the decision of The Owner as to the resolution of such discrepancy, omission, ambiguity or conflict and it will be deemed that the Proponent has included the most costly alternative in its proposal.

5.0 ERROR IN PROPOSAL

No proposal shall be altered, amended or withdrawn after the time specified for opening proposals. Negligence on the part of the Proponent in preparing the proposal documents confers no right for the withdrawal of proposal after it has been opened.

6.0 RIGHT OF REJECTION OR ACCEPTANCE OF PROPOSAL

The Owner reserves the right, in the Owner's sole and unfettered discretion, to:

- accept any Proposal submitted prior to the RFP Closing Time, as specified in the RFP;
- accept the withdrawal of such Proposal as permitted hereunder or by the RFP;
- to reject any or all Proposals, at any time without further explanation
- disqualify or reject any proposals which contain qualifying conditions or otherwise fail to conform to these proposal documents;
- to waive or rely upon non-compliance, irregularities and informalities with the proposal documents, specifications or any conditions;
- if the Proponent fails to state the time within which a proposal must be accepted, it is understood and agreed that the Owner shall have sixty

correspondence, publications, prints of a microfilmed Record, etc.)

7.0 SUBMISSION OF PROPOSAL

- .1 Proposals shall be submitted in the format identified in the RFP documents.
- .2 Proponents shall accept collect calls or provide toll-free telephone numbers for inquiries from the Town of Blackfalds.
- .3 No proposal shall be altered or amended after the Closing Time without the agreement of Town of Blackfalds.
- .4 Prices included in the Proposal shall be FOB the Owner's site specified in the RFP unless clearly stated otherwise.
- .5 Proponents are specifically advised to note that where the RFP includes Sites of Users, it is intended that the Users will have the same rights relative to goods or services provided to their Sites that the Town has under the Contract, whether or not the Users become a party to the Contract. Where the User is not a party, the Town will be deemed to be an agent of the User for all purposes other than payment.
- .6 No Proposal award decision will be made until the County has had an opportunity to examine and evaluate all Proposals.

8.0 PROPOSAL MODIFICATIONS

Proponents wishing to amend their proposal prior to the RFP closing time may do so by:

- .1 delivering, in writing, the modification to the address as noted in the "Instructions to Proponents"
- .2 clearly identifying the differences between the original submission and the modified version
- .3 the modified version must follow the same format for delivery as the original, but clearly indicating that the second submission is a modification to the original
- .4 ensuring that the modification is signed by the authorizing representative who had signed the original

The modification will override only those areas applicable to the original submission. Only one modification submission is permitted per Proponent.

Modifications will follow the same evaluation, terms and conditions as set out in this RFP.

9.0 PROPOSAL WITHDRAWAL

- .1 The Proposal may be withdrawn at any time up to one (1) hour prior to the RFP Closing Time but only on the submission of a request in writing signed by the Proponent at the office at which the Proposal was originally submitted. The proposal withdrawal request may be submitted by fax.
- .2 No Proposal shall be withdrawn following the RFP Closing Time unless some other person has been awarded the Contract or unless a period of time as stated in the RFP document has expired from the RFP Closing Time. A Proposal, which has not been accepted at the expiration of such time, shall be deemed to be automatically withdrawn at that time.
- .3 Negligence or errors on the part of the Proponent in preparing the Proposal documents confers no right for the withdrawal of Proposal after it has been opened.

(60) days to accept.

The lowest or any Proposal will not necessarily be accepted.

10.0 SUBSTITUTIONS

Proponents are encouraged to quote substitutions or alternate item(s) unless specifically identified as no substitution (no sub), but the responsibility of obtaining "equal to or exceeding" quality lies solely with the Proponents. Each alternate submission should include brochures, performance and test dates, etc., that will confirm "equal to or exceeds" quality specifications requested. The Owner reserves the right to have the Proponent provide samples of alternate / substitution item(s) for evaluation without any cost incurred by the Owner. The Owner will be the sole judge as to the acceptability of the substituted item(s). Costs incurred in the preparation of a proposal, provision of samples, or attendance at a pre or post award site meeting.

11.0 DISCUSSION

The Owner reserves the right to conduct discussions with any Proponent that submitted a proposal to assure full understanding of the proposal submitted.

12.0 PROPOSAL AWARD

A proposal award decision may be made after the Owner has had an opportunity to examine and evaluate all proposals in detail. The Owner reserves the right to reject any or all proposals and to accept any part of one or more proposals. The decision of the Owner is final. This proposal does not commit the County to award a contract or to pay any cost incurred in the preparation of a proposal, provision of samples or attendance at a pre or post award site meeting.

13.0 PROPOSAL REQUIREMENTS

Requirements are as listed and detailed in the "Scope of Work" of this document.

14.0 CERTIFICATION

The Town of Blackfalds will not evaluate any Proposal until such time that the signed certification is received. If the signed certification is not enclosed at the time of the Proposal submission, the Town will make an effort to contact the proponent for the certification at which time the proponent will have two (2) business days to forward the signed certification. If no signed certification is received within the two business days, the Proposal will be disqualified and returned via mail to the proponent.

- Order of contact will be as follows:
- Telephone call
- Fax
- Email

Contact will have been considered made through any and all of these means. The proponent will then have two (2) business days in which to provide the signed certification and faxing will be acceptable in this instance.

Proponents must date and sign their submission in Section 10.0. Failure to complete and sign will disqualify a proposal.

Note: A signed covering letter will not replace the requirement for signing the certification document.

15.0 ALBERTA FREEDOM OF INFORMATION AND PROTECTION OF PRIVACY ACT

Intent: This section provides general information regarding the

16.0 AMENDMENTS

The Owner reserves the right to amend or revise the proposal documents by addenda up to forty-eight (48) hours prior to the proposal closing time. Verbal instructions given in person are null and void and shall not be accepted by the Proponent. Receipt of all addenda by Proponents shall be acknowledged. It is the Proponents responsibility to ascertain and verify, prior to the closing time, that it has received any and all addenda issued in relation to this proposal package

17.0 CONTRACT

The signing of a formal written agreement shall constitute the making of a contract between the Town and a successful Proponent. No Proponent shall acquire any legal or equitable rights in relation to the Town until the signing of a written agreement by the Town of Blackfalds. The Contract shall include all portions of the RFP not expressly overridden in negotiations.

18.0 NEW TECHNOLOGY

In the event that new technology is introduced during the term of any Contract relating to the materials, supplies and services provided under the Contract, and; if in the opinion of the Owner that new technology is deemed a requirement of the Owner, the Vendor will be notified of such Findings. Discussions, regarding suitability of the new technology in relation to the existing stated requirements, will be held with the awarded supplier.

19.0 TIME

All Time, except time of payment, is of the essence.

20.0 ASSIGNMENT

This contract shall be binding upon the parties' respective successors and permitted assigns. Neither party may assign this contract or any of its rights or obligations hereunder without the prior written consent of the other party, and such attempted assignment shall be void, except that either party may assign this contract, or any of its rights or obligations hereunder, upon written notice to the other party, to any of its subsidiaries and/or affiliated companies, without the consent of the other party. Furthermore, no work to be performed by the contractor hereunder shall be subcontracted to or performed on behalf of the contractor by any third party, except upon prior written permission by the Owner.

21.0 COMPLIANCE WITH LAWS

The Proponent shall be responsible for complying with all Federal, Provincial (Alberta), and Municipal laws, rules, regulations and guidelines that apply.

22.0 FINANCIAL

The Owner reserves the right to investigate Proponents financial position.

23.0 REFERENCES

The Proponent shall include evidence, satisfactory to the Owner, of ability to perform.

24.0 METHOD AND ORDER

Proponents shall provide and include with their proposal submission an address, telephone number and / or facsimile number to which any resulting contract may be directed.

Such indemnification shall survive this agreement.

responder's obligations in relation to the Alberta Freedom of Information and Protection of Privacy Act for the handling of information and Records related to both the responses to this Request for Proposal and any subsequent contract. Responders may wish to seek their own legal advice on specific aspects of these obligations.

25.0 PROPOSAL PRICES

- Proponents must specify pricing structure as identified in the appropriate section of this document.
- Pricing shall be quoted in Canadian dollars.
- Proponents are to quote prices based on F.O.B. the Owner's site specified.
- The Owner reserves the right to request satisfactory evidence of any price amendment.
- Proponent must specify down payment expectations.

26.0 SOLE BID

In the event that only one bid is received, the Town of Blackfalds will request from that sole Proponent the following information:

- (a) Current published public sector pricing;
- (b) Paid invoices for like items (like quality and quantity);
- (c) Price breakdown showing, if applicable, the cost of direct labour, direct materials, purchased items, engineering and plant overheads, general and administrative overhead, transportation, profit, insurance, and any other applicable costing related to the product the Owner feels justifies the cost of the product.

In the event of non-performance, the Owner reserves the right to acquire the items from alternative sources, and the vendor shall be responsible for any excess cost occasioned thereby and will pay the amount thereof to the Owner on demand. If the Vendor defaults or fails to perform in accordance with the Terms and Conditions of the offering or otherwise does not comply with this agreement as it affects the Vendor's obligations, the Owner may, at its sole discretion, terminate any remaining portion of this contract with the Vendor upon five (5) days written notice delivered to the vendor, free of any claim of the Vendor of every nature and kind.

27.0 VENDOR PERFORMANCE / DEFAULT

Vendors aware of potential or pending supply difficulties must notify the Owner immediately of such difficulties before lack of supply of contracted products endangers the Owner's ability supply products to user areas

28.0 FORCE MAJEURE

1. Neither party shall be responsible for any delay or failure to perform its obligations under this Agreement where such delay or failure is due to fire, flood, explosion, war, embargo, government action, Act of Public Authority, Act of God, or to any other cause beyond its control, except labour disruption.
2. In the Event of a Force Majeure, the party who is delayed or fails to perform shall give prompt notice to the other party and shall take all reasonable steps to eliminate the cause.
3. Should the Force Majeure event last for longer than thirty (30) days; the Owner may terminate the Agreement by notice to the contractor without further liability, expense or cost of any kind.

29.0 GOODS AND SERVICES TAX

The Owner is subject to Goods and Services Tax. All Goods and Services Tax shall be identified as a separate line item.

30.0 INDEMNIFICATION

The Vendor shall indemnify and hold the Owner harmless with respect to

31.0 COMMITMENTS

Nothing in this RFP shall be construed as authority for the selected Vendor to make commitments, which shall bind the Owner to otherwise act on behalf of The Owner, except as the Owner may expressly authorize in writing.

32.0 PERSONAL INJURY / PROPERTY DAMAGE

The Owner shall not be liable or responsible for any bodily or personal injury or property damage of any nature what-so-ever that may be suffered or sustained by the Vendor, its employees or agents, in the performance of any agreement.

33.0 INSURANCE

The Vendor, with whom the Owner wishes to enter into an agreement, shall, at the Vendor's own expense, provide the Owner, with the following applicable Certificate of Insurance, with an insurer license in Alberta, prior to the commencement of any contract resulting from this Request for Proposal:

- .1 Comprehensive general liability for an amount of not less than two million dollars (\$ 2,000,000.00) inclusive per occurrence.
- .2 Standard automobile insurance for all vehicles owned, licensed, or leased by the successful proponent for an amount of not less than two million dollars (\$2,000,000.00) inclusive per occurrence.
- .3 Non-Owned vehicle insurance, for all applicable vehicles, coverage in an amount of not less than two million dollars (\$2,000,000.00) inclusive per occurrence.
- .4 Professional liability insurance for an amount of not less than one million dollars (\$2,000,000.00) inclusive per occurrence.
- .5 Errors and Omissions insurance for an amount of not less than one million dollars (\$2,000,000.00) inclusive per occurrence.

34.0 WORKER'S COMPENSATION BOARD STATEMENT

The Vendor shall at all times comply with all the requirements of the Worker's Compensation Act of Alberta, amendments thereto, or any successor legislation; and shall upon notice by the Owner, provide evidence satisfactory to the Owner of said compliance with the Act within two (2) business days of request by the Owner.

35.0 GOVERNING LAW

Any agreement resulting from the Request for Proposal is governed and interpreted in accordance with the laws of the Province of Alberta.

36.0 JURISDICTION

The parties agree that the laws of the Alberta shall govern the contract and the Courts of Alberta shall have sole and exclusive jurisdiction over any dispute or lawsuit between the parties.

37.0 LIMITATIONS OF DAMAGES

Irregardless of whether or not a proponent is successful in the award of this proposal, by submitting a proposal, agrees that it will not claim damages in excess of an amount equivalent to the reasonable costs incurred by the proponent in preparing its proposal for matters relating

all withholding and all other taxes or amounts of any kind relating to employment of any of the persons providing services to the Owner with to the agreement or in respect of the competitive process, and the

respect to this Agreement.

The Vendor shall indemnify and hold harmless the Owner, its employees and agents, from any and all claims, demands, actions, and costs what-so-ever that may arise, directly, or indirectly, out of any acts or omissions of the Vendor in this Agreement.

Proponent, by submitting a proposal, waives any claim for loss of profits if no agreement, irregardless of form, is made with the proponent.

38.0 CONFIDENTIALITY

All documents submitted to the Owner are subject to the protection and disclosure provisions of the **Freedom of Information and Protection of Privacy Act**. While this *Act* allows persons a right to access to records in the Owner's custody or control, it also prohibits the Owner from disclosing your personal or business information where disclosure would be harmful to your business interests or would be an unreasonable invasion of your personal privacy as defined in *sections 16 and 17* of the *Act*. Proponents are encouraged to identify what portions of their submissions are confidential and what harm could reasonably be expected from its disclosure.

The purpose of collecting personal information required to be provided in this RFP is to enable the Town of Blackfalds to ensure the accuracy and reliability of the proposal, and to evaluate the submission in response to the RFP. This information is required by the Town of Blackfalds to carry out its operations.

It is recommended that Proponents advise persons whose personal information is being provided to the Town of Blackfalds under this Request for Proposal that the privacy of the personal information as well as its possible disclosure by the Town of Blackfalds to third parties, upon request, will be governed by the FOIP Act.

Questions about the collection of personal information pursuant to this Request for Proposal shall be submitted to the FOIP Coordinator, (please refer to the RFP, Instruction to Proponents, Item 4.1 Inquiries).

39.0 DISCLOSURE OF PROPOSAL CONTENTS

In the event that the Owner chooses to have a public opening, the Owner will only disclose the proponent's name and the total bid price, with or without GST as requested in this RFP.

After all proposals have been opened, the Owner may, at its discretion, release to the public a summary of proponents and the proposal price submitted by each proponent.

Should the Owner make an award of this proposal, the awarded proponent's name and total bid including GST will be made known to the other proponents who had responded to this particular RFP.

At no time will the Town disclose the details of any proposal submitted unless requested under the *Freedom of Information and Protections of Privacy Act* as outlined in Section 38 above.

END OF GENERAL TERMS AND CONDITIONS

Building Site Inspections

A SCO will conduct site inspections at the stages indicated in the following tables:

Site Inspection Stages for Part 9 Buildings Not Requiring Overall Professional Involvement

New Construction OR Alteration, addition renovation, reconstruction, change of occupancy, (with a value of work more than \$20,000)	Single and Two Family Dwellings (Group C)	4	<ul style="list-style-type: none"> ▪ footings ▪ complete foundation (prior to backfill) ▪ solid or liquid fuelled appliance(s) & framing (prior to covering up with insulation and vapor barrier) ▪ insulation and vapour barrier (prior to drywall) AND <ul style="list-style-type: none"> ▪ final occupancy, including HVAC completion (within 180 days of permit issuance)
New Construction OR Alteration, addition renovation, reconstruction, change of occupancy, (with a value of work more than \$20,000)	Multi-family Residential, Townhouses, Small Apartments (Group C)	4	<ul style="list-style-type: none"> ▪ footings ▪ complete foundation (prior to backfill) ▪ solid or liquid fuelled appliance(s) & framing (prior to covering up with insulation and vapor barrier) ▪ insulation and vapour barrier (prior to drywall) AND <ul style="list-style-type: none"> ▪ final occupancy, including fire alarm and HVAC completion (within 180 days of permit issuance)
New Construction OR Alteration, addition renovation, reconstruction, change of occupancy, (with a value of work more than \$20,000)	Business & Personal Services, Mercantile, Med. & Low Hazard Industrial (Group D, E, F2, F3)	4	<ul style="list-style-type: none"> ▪ footings ▪ complete foundation (prior to backfill) ▪ HVAC rough in ▪ framing, structure (prior to insulation and vapour barrier) AND <ul style="list-style-type: none"> ▪ final occupancy, including HVAC completion (within 180 days of permit issuance)
Alteration, addition, renovation, reconstruction, change of occupancy (with a value of work of \$20,000 or less) OR Other types of permits not covered in this table	All types of Part 9 Buildings (Group C, D, E, F2, F3)	2	<ul style="list-style-type: none"> ▪ framing ▪ final

Site Inspection Stages for Part 3 Buildings Not Requiring Overall Professional Involvement

Type Of Project	Major Occupancy	Minimum # of Inspections	Inspection Stage (NOTE: inspect all work in place at time of inspection)
New Construction OR Alteration, addition, renovation, reconstruction, change of occupancy, (with a value of work more than \$20,000)	A, B, C, D, E, F	4	<ul style="list-style-type: none"> ▪ foundation ▪ framing, structure ▪ heating and ventilation ▪ interior partitioning AND <ul style="list-style-type: none"> ▪ final occupancy (within 365 days of permit issuance) <p>▪ NOTE: Any of these site inspections may be combined when it's reasonable to do so, and if site conditions permit.</p>
Alteration, addition, renovation, reconstruction, change of occupancy (with a value of work of \$20,000 or less) OR Other types of permits not covered in this table	A, B, C, D, E, F	2	<ul style="list-style-type: none"> ▪ framing ▪ final/occupancy

Site Inspection Stages, Part 9 or Part 3 Buildings Requiring Overall Professional Involvement

Type Of Project	Major Occupancy	Minimum # of Inspections	Inspection Stage (NOTE: inspect all work in place at time of inspection)
New Construction OR Alteration, addition, renovation, reconstruction, change of occupancy, (with a value of work more than \$20,000)	A, B, C, D, E, F	2	<ul style="list-style-type: none"> ▪ interim inspection at approximately the mid-term of the work AND <ul style="list-style-type: none"> ▪ final/occupancy
Alteration, addition, renovation, reconstruction, change of occupancy (with a value of work of \$20,000 or less) OR Other types of permits not covered in this table	A, B, C, D, E, F	1	<ul style="list-style-type: none"> ▪ final/occupancy

Site Inspection of labeled mobile home sitting, and minor residential improvements including detached garages, decks or basement renovations will consist of at least one site inspection within 90 days of permit issuance, or at the discretion of the SCO, consist of a completed Verification of Compliance.

Site Inspection of Part 10 buildings will consist of at least one on-site inspection at the final set-up stage within 90 days of permit issuance.

Site Inspection of Solid or Liquid Fuelled Heating Appliances (under separate permit) will consist of at least one on-site inspection, prior to covering, within 90 days of permit issuance.

Site Inspection of Mechanical, Heating, or Ventilation Systems (under separate permit) will consist of at least one on-site inspection at the completion stage, prior to covering, within 90 days of permit issuance.

Site Inspection For Demolition permits (under separate permit) will be at the discretion of the SCO responsible for permit issuance for single family dwellings and their accessory buildings, and will consist of at least one on-site inspection prior to demolition for all other buildings.

Site Inspection of Non-flammable Medical Gas Piping Systems will be at the discretion of the SCO responsible for permit issuance. The SCO will follow up all ABC deficiencies identified by the testing Agency, to ensure compliance.

END OF SECTION

9.0 SCHEDULE OF FEES

10.0 CERTIFICATION

Failure to complete, sign and submit this certification with the proposal package, may disqualify this proposal

We _____
(Legal Company Name)

Of _____
(Business Address)

(Telephone Number)

(Fax Number)

Having examined and read the quotation documents for RPF for provisions of Safety Codes Services as issued by the Town of Blackfalds, do hereby bid and agree to provide the services/products in accordance with the proposal/RFP documents, and do hereby agree to accept the terms and conditions set out in this Request for Proposal.

Executed this _____ day of _____, 2021

Signature of Authorized Representative

(Print or Type) Name and Status of Authorized Representative

The personal information provided by you is being collected under the authority of the Municipal Government Act (the "Act") and will be used for the purposes under that Act. The personal information that you provide may be made public, subject to the provisions of the Freedom of Information and Protection of Privacy Act.



**TOWN OF BLACKFALDS
STANDING COMMITTEE OF COUNCIL
REQUEST FOR DIRECTION**

MEETING DATE: January 18, 2021

ORIGINATED BY: Myron Thompson – Chief Administrative Officer

SUBJECT: Alberta Civil Society Fund – Letter of Support for IMAGINE Citizens

BACKGROUND:

The new Civil Society Fund (CSF) has been established to support an effective and sustainable recovery of the civil society sector. The CSF provides \$20 million to expand civil society's capacity to address social problems for Albertans, with \$7 million budgeted for 2020/21. The objective of this program is to support civil society's recovery from the COVID-19 pandemic.

Civil society includes non-profit and voluntary organizations, registered charities, informal groups or movements pursuing shared interests or values and private-sector organizations and individuals pursuing social good. Civil society plays a critical role in the well-being of Albertans and contributes significantly to Alberta's economy. This program funding will help build even more effective civil society organizations by leveraging the existing strengths of the sector and assist in the overall recovery for Alberta.

CSF funding is one-time only with the application deadline being January 20, 2021. Activities advanced through this program need to be completed with a 24-month period of endorsement of an agreement.

IMAGINE: Citizens Collaborating for Health is a formed society made up of a diverse group of citizens from all walks of life, most of whom have had some interaction with the healthcare system and are working together to influence decision making at all levels and to become recognized partners in improving our Province's healthcare system. IMAGINE Citizens have been established since 2015 and utilize their knowledge and experiences to assist in helping improve the healthcare system. More information on this group's activity can be sourced at www.imaginecitizens.ca

DISCUSSION:

IMAGINE Citizens is making application under the CSF program and are requesting support from the Town of Blackfalds in the form of a letter of endorsement for the proposal. If IMAGINE Citizens is successful in receiving funding for their proposed "Alberta Community Health Ambassador Program" the Town of Blackfalds will have ample opportunity to discuss whether to formally partner with IMAGINE Citizens or to act strictly in a support capacity and to advise the Blackfalds Health Professional Attraction and Retention Committee in deliberating about how they might partner with the organization.

At the most recent BHPARC Meeting held January 13th, the Committee endorsed a letter of support for the application (see attachment) for IMAGINE Citizens. The CSF



**TOWN OF BLACKFALDS
STANDING COMMITTEE OF COUNCIL
REQUEST FOR DIRECTION**

Application summary is also included as an attachment and provides an overview of the project activity objectives.

FINANCIAL IMPLICATIONS:

N/A

ADMINISTRATIVE RECOMMENDATION:

That the Standing Committee of Council direct Administration to develop and provide a letter of support from the Municipality for IMAGINE Citizens in support of their application under the Civil Society Fund (CSF) program.

ALTERNATIVES:

- A. That the Standing Committee of Council does not support the letter of support by the Municipality as requested.
- B. That the Standing Committee of Council refer back to Administration for more information.

ATTACHMENTS:

- *BHPARC Draft Letter of Support*
- *IMAGINE Citizens CSF Application Summary*

Approvals:



CAO Myron Thompson

Department Director/Author

Annamarie Fuchs
Blackfalds Health Professional
Attraction & Retention Committee.
#13 Westglen Blvd,
Blackfalds, AB. T0M 0J0

403-896-3909
aafuchs@telus.net

January 12, 2021

To: The Civil Society Fund
Government of Alberta, Civil Society Fund
<https://www.alberta.ca/civil-society-fund.aspx>

Good day;

The Town of Blackfalds is one of the fastest growing and youngest rural communities in Canada. We are centrally located near Red Deer Alberta and between the metropolitan cities of Calgary and Edmonton. And we have an interest in creating a community health system centered around innovation, diversity, interdependence, and longevity.

We have established a committee of residents whose focus is to attract and retain health professionals to the community as a means to build a robust and diverse health infrastructure for our community.

The Civil Society Fund (CSF) application presented by IMAGINE: Citizens Collaborating for Health is something that we wholeheartedly endorse. IMAGINE Citizens has the capability to work with a range of groups and communities to build and to strengthen a network of connectors who will drive innovation that will change the landscape of health in this province. If the IMAGINE Citizens proposal is funded, we look forward as a town and as a committee to exploring how we might participate with one or more of the CHA's

Thank you for the opportunity to offer our support to IMAGINE: Citizens Collaborating for Health.

Sincerely,

Annamarie Fuchs, Chair
Blackfalds Health Professional Attraction & Retention Committee.

Fund purpose:

This fund is to build more effective civil society organizations by leveraging the existing strengths of the sector. An effective, sustainable recovery for civil society will play an important role in Alberta's overall COVID recovery.

Application Summary:

A pressing social issue in AB is that people are losing trust in critical pieces/elements of ABs traditional approaches to providing health services and information, as observed during the COVID-19 pandemic. Additionally, people continue to face multiple systemic challenges and barriers to accessing health information and services. Innovation and change are needed. This project will introduce an Alberta Community Health Ambassador Program (ACHAP) and Community Health Ambassadors (CHAs) across Albert to drive change that works in communities for communities. Starting with rural and ethno-cultural communities, ACHAP will:

- 1) Build a network of visible, respected, trusted CHAs to act as connectors within and among communities, civil society and health organizations to drive and guide change and innovation informed by the voices of people in communities.
- 2) Build community capacity to engage and manage personal and family health concerns and interactions with the health system and organization and inform change and innovation priorities and directions.
- 3) Increase civil society's ability to identify and understand community concerns and challenges AND strengthen community and individual health.
- 4) Strengthen civil society's ability to contribute ideas to AND participate in organizational and system change and innovation efforts.

Project Activities:

A. Partnership and Project Development

- Project planning (expectations, roles & responsibilities, outcomes/deliverables, communications, stakeholders, and future partners (e.g., education, primary health, municipalities, FCSS).
- Governance framework and requirements (e.g., IP ownership; legal considerations).
- Sustainability model (e.g., Explore ACHAP delivery through partners, education; new partner recruitment; social enterprise for revenue generation; non-regulated health professional employment and volunteer honorariums for CHAs; compensation / recognition framework).
- Maturity model aligned with civil and health organizations and supported by a virtual knowledge management and networking platform.

B. ACHAP Co-design

- Identify CHA Cohort 1 and co-design CHA role and ACHAP education, training, and fieldwork materials, building on existing resources with partners and CHAs
- Identify ACHAP knowledge management and networking platform (leverage existing AB investments)

C. CHA Cohort 1 Fieldwork and ACHAP Improvements

- Support CHA Cohort 1 fieldwork and use feedback to improve ACHAP materials and delivery

D. Recruit, Train & Support Next CHA Cohorts & Continual Improvements

- Recruit, train, and support Cohorts 2 & 3; continue support for Cohort 1
- Use feedback from CHAs to improve ACHAP courses and materials
- Implement sustainability model and maturity model

E. Project Sustainability and Maturity Activities

- Formalize sustainability and maturity models and implement with partners and develop agreements.

F. Developmental Evaluation and Monitoring



**Town of Blackfalds
Council 2017-2021**

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OFFICE OF THE MAYOR/COUNCIL

January 19, 2021

Civil Society Fund
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10044 108 Street
Edmonton, Alberta T5J 5E6

Re: Letter of Support for IMAGINE: Citizens Collaborating for Health

I am writing this letter of support on behalf of Blackfalds Town Council in support of the IMAGINE: Citizens Collaborating for Health application for Civil Society Funding.

This opportunity for Civil Society funding, with the intentions of supporting transformational change, improving the organization's function, and building civil societies' capacity to work together, is an excellent fit for the IMAGINE: Citizens Collaborating for Health Initiative. The proposed Alberta Community Health Ambassador Program will work across Alberta to rebuild trust in provincial institutions by building network connections within and among communities. Community capacity will increase and strengthen due to Community Health Ambassadors working for their communities from within their communities.

The Town of Blackfalds is a young, dynamic, growing community that supports this innovative initiative. We look forward to participating together with IMAGINE: Citizens Collaborating for Health to increase our community and residents' health.

The opportunity to collaborate with IMAGINE: Citizens Collaborating for Health is an exciting one in line with our municipalities goals of being a progressive and growing family community, situated in an economically sustainable, collaborative, healthy, safe, and beautiful living environment, where opportunities are abundant and realized through partnerships and innovation.

Thank you for reviewing this letter of support. I welcome the opportunity to discuss our support for this initiative.

Sincerely,

Mayor Richard Poole
Town of Blackfalds

Municipal Index Comparison:

The Government of Alberta has published an evaluation tool for municipalities. This is located at:

<https://regionaldashboard.alberta.ca/#/>

The GOA is calling this the Municipal dashboard and the same factors are publicized for all communities in Alberta. My question to Council is do we wish to delve deeper into this dashboard to understand what each of the factors explain and how we may compare comparative communities.

This is something that the GOA is encouraging citizens to do however there has not been a clear indication how these figures were arrived at or if they provide information that is valuable to municipalities throughout Alberta.

I do not have any preference with how Council should proceed but I feel it is important for Council to consider whether they wish to ask Administration to provide an analysis.

Request for Direction:

1. I move that Council request administration provide an analysis of the Municipal Indicators for Blackfalds as well as provide a list of communities that we can use for comparative purposes and present these findings to Council in a comprehensive manner that allows Council time to question and evaluate.
2. Accept for information.

Council Budget Process

Background: This is being brought forward by the Office of the Mayor:

Over the past two years questions and requests regarding the budget process have been brought forward by members of Council. I feel Council should address these questions in a manner that will allow our administration time to provide input and implement any requested changes. Depending on the scope of this request administration and Council may require considerable time to evaluate the consequences of our decision to either continue with existing Council budget practices or implement an alternative approach.

Questions include, but may not be limited to:

1. What information should Council receive from administration regarding the budget.
 - a. Currently the policy reads that administration will increase the annual budget 1% per year, but this amount will be reviewed annually.
 - i. With this direction it is the responsibility of Administration to bring this forward annually for council consideration in a prebudget meeting.
 - ii. From the prebudget meeting Departments through their Director work together to meet and prepare a budget based on current service levels that administration feels have been directed by Council throughout the year. Many adjustments are made during this administrative budget development process and changes can be made to department's original budget request to enable administration to meet Council's requested goal.

This practise, which Council endorses is very efficient, but may create an experience that prevents Council from being involved in the total discussion. When the proposed budget is brought before Council administration has already decided what will and will not be included. During the Budgetary meeting Councillors review the budget and based on their experience and concerns provide feedback on what they feel should be increased or decreased as well as make decisions on items that the budget team has brought forward as possible inclusions, but they have not been part of the discussion of the budget development.

- iii. Is there a better way that Council can direct administration to present their budget?

2. Does our current Operational budget process accurately reflect Council's priorities?
 - a. For example: is Community Services more important than Infrastructure & Services and to dig deeper, how important is the All-Star park operation compared to Street Cleaning? Does Council feel that we need to have this have the budget in a more quantifiable form that reviews each service and its % of the budget. Currently this % is provided in a comprehensive graph at the beginning of the budget but Council does not have the time to relate this to what we feel our Council's priorities are.
 - b. In addition, CSD has additional citizen oversight and support through the Recreation and Culture and the FCSS boards that we do not have for our I.S. or Corporate Services department. The overriding question is does Council feel we should take a more active role in the operating budget process as a method of implementing Council priorities?

3. Included in our budget discussion is our ten-year Capital Plan and review of Reserves and off site levies.

- a. Capital expense and planning Process: I feel our Town Council currently has a good description of the projects that are anticipated by administration in the upcoming year and for the next ten years. This presentation made at Budget time is complete and provides a comprehensive summary of projects that are being requested during the upcoming year. While some unanticipated projects may occur, most of the projects presented are based on concrete data that our Town is very conscientious about obtaining to explain the need and timing for projects to move forward.
- b. One area that may require greater consideration is how, when it comes to our capital budget, do we identify and decide if new proposed projects should be brought back for review based on changing circumstances. While Administration is respectful of any requests from Council to review projects the only review of this plan is done

c. **Budget process' that we could consider in the future:**

Please See attachment.

Administration has offered to walk us through the advantages and disadvantages of each of these methods and possibly other methods as well and may be the only action Council wishes. This approach is reflected in the RFD below.

Questions moving forward.

1. Is Council satisfied with how we have decided budgets in the past?
2. Does Council wish to investigate different budgetary processes and if so develop a method for Council to do so including the following factors as well as those suggested during the discussion period.
 - a. Costs of our proposed investigation needs to include staff support/time and paperwork.
 - b. Councillor time. I assume that the any meetings during this process would be in a committee form and therefore would not qualify for Council remuneration.

The above information is intended to provide background for the following request. I don't feel any ownership for any of the following alternatives but felt that it was important for Council to consider alternatives while we still have time to begin implementation of them before the formal budget process starts.

Request for direction

Alternative 1:

"I move that Council consider investigating alternative Budgetary development processes that may allow Council to more comprehensively evaluate service levels and expenditures during the budget development process. For this to be effective Council will develop directions and timelines to administration to clarify their input.

Alternative 2:

Request that administration provide a training session for Council regarding the pros and Cons of different budgetary approaches. No further action contemplated.

Alternative 3.

Accept for information.

A handwritten signature in blue ink that reads "Richard Poole". The signature is written in a cursive style with a small dot above the 'i' in Richard.

Mayor Richard Poole

BUDGET FORMATS

By presenting selected information in particular ways, budget documents focus attention on certain questions, relationships, and developments. Because budget formats “establish the rules by which the budgeting game is played (the decision rules)” and also “create the standards by which success is measured (rules of evidence),” formats are important to public budgeting.

“When we speak of budgeting formats, we are talking about the way in which budgeting information is structured, the kind of information that is required to justify budget requests, and what kind of questions are asked during the budget review process” (Morgan, 2002, p. 71).

There are four general types of approaches: line-item, performance, program, and zero-based, plus hybrids. Table 1 compares them and the following discussion describes them in detail.

Table 1. Budget Formats

	Purpose? Central Question? Problem to be Solved?	Chief Characteristics	Central Actors	Conditions for Success	Strengths
Line Item/ Object Code/ Incrementalism	Financial accountability Is the money being spent according to intention? Preventing mis- appropriation of funds.	Focus is on past, with last year as the “base” Use of formulas, like “fair share” to balance the budget	Accountants and central office budget managers interested in balancing the budget. Constituency advocates in the legislature	Minimum amount of staff time and expertise is needed to create and track the budget	Works well when time is short, there is considerable complexity, multiple stakeholders, and high potential for conflict
Program Budgeting (PPBS)	Program accountability Is the program achieving its goals and objectives? Program effectiveness	Focus is on program plans, goals and objectives. Requires budgeting to a plan	Program managers & program analysts	Requires the resources necessary to develop program plans, goals and objectives	Provides clear linkage between program activities and budget allocation Links parts to whole and present to future

Table 1, continued

	Purpose? Central Question? Problem to be Solved?	Chief Characteristics	Central Actors	Conditions for Success	Strengths
Performance Budgeting	<p>Program efficiency/ effectiveness</p> <p>Is the program cost-effective? Is the program effective?</p> <p>Measures of what is being accomplished</p>	Measurements are created for workload activities, efficiency of resource allocation and effectiveness	First line supervisors and street-level bureaucrats	<p>Requires considerable resources to develop reliable measures</p> <p>Requires time to develop confidence of those needed to create performance measures</p>	Provides objective ways of documenting accomplishments
Zero-Based Budgeting (ZBB)	<p>Priority and appropriateness of what is and should be done</p> <p>What should we be doing? Are we giving appropriate priority to current programs/ activities?</p> <p>Deciding whether to continue doing what has been done in the past</p>	Systematic re-examination of some portion of current program activities from the ground up.	Depending on the primary locus of authority, ZBB can be done at any and all levels of the organization.	<p>Requires considerable time and resources to re-examine activities from the ground up.</p> <p>Requires self-confident staff & managers</p>	<p>Provides opportunity for existing assumptions and activities to be re-examined.</p> <p>Provides opportunity to reallocate resources</p>

Reprinted by permission. Morgan, Douglas, with the assistance of Kent Robinson and support of Drew Barden and Dennis Strachota, 2002. *Handbook on Public Budgeting*. Portland State University, Hatfield School of Government, State of Oregon edition, Table 7-6, pp. 162–163, <http://eli.pdx.edu/erc/morgan/handbook6.doc>.

Alternative Methods of Budgeting

Line-Item Budgeting

A line-item budget lists, in vertical columns, each of the city's revenue sources and each of the types—or classes—of items the city will purchase during the fiscal year. Following is an example of how line-item budgeting would be used in a small town public works department.

The line-item budget, which is the most widely used of all budgeting systems, offers many advantages. It is comparatively easy to prepare and doesn't require sophisticated financial skills. Also, the line-item budget is straightforward, simple to administer, and readily understood by the city council, city employees, and citizens. Moreover, the simplicity of the system makes it easier for the city council and administrator to monitor revenues and expenditures, which is important in this era of shrinking resources.

DEPARTMENT: Public Works

Expenditure Classification	Previous Fiscal Year 1996-97: Actual	Current Fiscal Year 1997-98: Budgeted	Next Fiscal Year 1998-99: Request
Personal Services	\$	\$	\$
Supplies	\$	\$	\$
Contractual Services	\$	\$	\$
Capital Outlays	\$	\$	\$
TOTALS	\$	\$	\$

The major deficiency of line-item budgeting is that the laundry-list format of the system provides no method of determining the amount of a particular city service produced by a given level of

spending. Also, the broad expenditure categories used in a line-item budget make it difficult to set service priorities because there is no way to calculate the quantity or quality of services that would result from various expenditure levels.

Program Budgeting

Unlike the line-item budget, which lists total departmental appropriations by items for which the city will spend funds, a program budget displays a series of “mini-budgets,” which show the cost of each of the activities that city departments perform. In the case of the water department, for example, a separate mini-budget would be established for water production and distribution, water system repair and maintenance, and meter reading.

The sample below shows the budget for the street sweeping program of a public works department. Each of the other programs conducted by the department—street repair, solid waste collection, and inspection services—would have a similar, separate budget.

DEPARTMENT: Public Works

PROGRAM: Street Sweeping

Expenditure Classification	Previous Fiscal Year 1996-97: Actual	Current Fiscal Year 1997-98: Budgeted	Next Fiscal Year 1998-99: Request
Personal Services	\$	\$	\$
Supplies	\$	\$	\$
Contractual Services	\$	\$	\$
Capital Outlays	\$	\$	\$
TOTALS	\$	\$	\$

Program budgeting enables the city council and administrator to identify the total cost of each municipal service and set spending levels and priorities accordingly. The downside to the program budget approach is that considerable time is required to establish and maintain the system. Also, programs tend to overlap, both between departments and within the same departments, which can make collecting data difficult.

Performance Budgeting

Performance budgeting is the same as program budgeting, except that one additional component—performance—is included to tie expenditures for each program to specific goals established for that program. For example, the amount budgeted for street sweeping would be

tied to an expected level of performance, such as sweeping “X” number miles of streets during the fiscal year.

If the city council chooses to increase the level of street sweeping to sweeping residential streets once every two weeks rather than once each month, the council can easily relate the cost of sweeping per mile and then multiply this figure by the additional miles that are to be added to the street sweeping program to determine the new budget figure.

Performance budgeting provides spending data that the city council and administrator can examine at the end of the fiscal year to identify the amount of service that each city department has actually produced. Additionally, by knowing the exact cost of each service, the council can determine its relative usefulness compared to the other spending priorities.

The negative aspect of performance budgeting is that it is difficult to develop measurable performance goals for simple programs, such as street sweeping. It is hard to set measurable goals for emergency medical services and other less-quantitative programs. Also, data collection can be difficult.

Zero-Based Budgeting

Zero-based budgeting is a system that requires all departments to defend their programs and justify their continuation each year. Instead of simply penciling in the amounts of the additional funds that are needed in each account, the department head must prepare a series of “decision packages” that describe—and justify—each of the department’s programs in detail.

For each program, the department must show: the various levels of service that could be provided with different levels of funding—including zero funding; alternative courses of action; and the consequences of funding the service at different levels, or not funding it at all.

In the decision package below, the head of the public works department is required to show what would happen if the amount budgeted next fiscal year for street sweeping were reduced by 25 percent. Similar decision packages would have to be prepared to show the effects of maintaining the funding at the current level, of increasing and of reducing expenditures by various percentages, or abolishing the program altogether.

DEPARTMENT: Public Works

PROGRAM: Street Sweeping

Instructions: Complete this decision package on the assumption of three different levels: continuation of the current funding level; a 10-percent reduction; and a 25-percent reduction.

Program Costs	Continuation of the Current Level of Funding	Assuming a 10% Reduction in Funding	Assuming a 25% Reduction in Funding
Personal Services	\$	\$	\$
Supplies	\$	\$	\$
Contractual Services	\$	\$	\$
Capital Outlays	\$	\$	\$
TOTALS	\$	\$	\$
Please describe the desired results of this program:			
Please list any alternatives and describe them:			
How and when will the results be accomplished:			
For each level of service, please clearly identify the results of operating at that level of funding:			
What would be the result of totally eliminating this program?			

Upon completing the decision packages for each program, the department head ranks each program's relative importance to the other programs within that department. This ranking enables the department head to express opinions on service priorities.

If cutbacks become necessary, the council can begin by trimming the lowest priority service by the smallest amount of expenditure shown in the decision package for that program. The council can make future reductions by working upward through other higher-ranking programs. It is important that each department head follow closely the priorities established by the city council in the policy statement that was issued before the staff began working on the budget.

The most positive feature of zero-based budgeting is that it requires a thorough evaluation of all programs on a continuing basis and encourages proper funding for priority programs at the expense of less useful programs. The major drawback to zero-based budgeting is that it is extremely time-consuming, costly, and requires a level of staff expertise that is not often available in small cities.

Source: Susan Combs (Texas Comptroller of Public Accounts). "Budget Manual, Appendix C, 2003." At <http://www.window.state.tx.us/lga/budget/apdxc.html>, accessed July 31, 2007.

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**TOWN OF BLACKFALDS
STANDING COMMITTEE OF COUNCIL
REPORT TO COUNCIL**

MEETING DATE: January 18th 2021

ORIGINATED BY: Justin de Bresser, Director of Corporate Services

SUBJECT: 2021 Municipal Census Program

BACKGROUND:

In the planning of the 2021 Operating budget, Council allocated money for a 2021 census to be completed this spring. Administration has started the planning process and requires direction from Council in relation to the format and questions.

DISCUSSION:

Over the past few months, Administration has been working on the project plan to facilitate the Census in the spring. This has brought upon some roadblocks initially. The City of Airdrie was the main supplier of the Census software over the past 10 years (<http://onlinecensus.ca/>). As a result of the Determination of Population Regulation that was repealed, the City of Airdrie will no longer be supporting their software for the time been. This has left the Town looking for another software provider.

The Towns Information Technology (IT) department reached out to the larger Cities to ensure there was no in-house software that the Town could use. However, most communities also used the City of Airdrie's software. The City of Red Deer has an inhouse software but they are not in a position to contract it out. IT was able to find a software that can generate the 5000 unique codes needed to complete the Census. This program will be imbedded into our website for residents to complete the Census.

As a result of the full software package not being available. Administration is looking for Council's direction on a modified Census this year. However, in future years when the City of Airdrie brings the software back online, we would recommend doing a full census.

Administration is proposing a 2 question Census:

1. How many people in your dwelling
2. Age group of these residents:
 - a. 0 to 5
 - b. 6 to 10 etc.

This modified Census will achieve the desired results of population growth since 2018 where the Town's rough estimates it would be close to 11,000. The cost of this modified census is expected to be well under the initial budget.

Administration reached out to the Province to determine if the Census must follow the 2019 Municipal Census manual (See attachment). Of question, is the need to determine the Census Day in the Town. The manual also indicates the dates of the Census from April 1 to June 30 of the same year. At this time, Administration is awaiting a call back from the Province to confirm this.



**TOWN OF BLACKFALDS
STANDING COMMITTEE OF COUNCIL
REPORT TO COUNCIL**

At minimum Administration will follow the best practices listed in this manual.


FINANCIAL IMPLICATIONS:

The 2021 Operating budget has \$30,000 identified to complete the Census. The recommendation from Administration to modify this Census will substantially reduce the cost and achieve the result of population growth over the 2018 to 2021 period. This information will help the economic development appeal of a growing Town through this trying period.

Attachments:

- *2019 Municipal Census Manual*

Approvals:



CAO Myron Thompson



Department Director/Author

Municipal Census Manual

Requirements and Guidelines for Conducting a Municipal Census

Alberta Municipal Affairs, Government of Alberta

January 2019

Municipal Census Manual

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Questions concerning this Municipal Census Manual, or further information on census methodologies, terms, and techniques for conducting a census are welcome and can be directed to:

Alberta Municipal Affairs

Strategic Policy and Planning Branch

17th floor, Commerce Place

10155-102 Street

Edmonton, Alberta T5J 4L4

Telephone: 780-427-2225

Fax: 780-420-1016

To be connected toll-free in Alberta, first dial 310-0000.

To contact us by email: LGS.Update@gov.ab.ca

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Preface

The procedures outlined in this manual constitute general standard practices used in conducting a municipal census of population. A special thanks to Statistics Canada for the use of their training materials and expertise in preparing this document.

For information regarding the prescribed authority for filing municipal population counts as specified under the *Municipal Government Act* and Determination of Population Regulation, please contact Alberta Municipal Affairs toll-free at 310-0000, or 780-427-2225.

Introduction

The Municipal Census Manual provides a step-by-step guide for conducting a census at the municipal level. It assists census coordinators and enumerators in complying with the Determination of Population Regulation and all other procedures and policies related to the census.

The manual contains a list of mandatory requirements for conducting a census, as well as a number of guidelines and recommendations.

The first sections of the manual describe the authority for conducting a municipal census, the role of the municipal council, and how to apply the *Freedom of Information and Protection of Privacy (FOIP) Act* to a municipal census.

The subsequent sections describe the role of the census coordinator and the census enumerator. The coordinator role focuses on preparing the census, choosing a methodology, supervising the census, and reporting on the results. The enumerator role section contains a list of potential enumerator materials, the methods for covering urban and rural enumeration areas, interviewing procedures, filling out the census forms, and preparing various types of census profiles.

The section, “Designing a Questionnaire,” provides a set of additional census questions that municipalities may choose to use in their census. The additional questions are based on the 2016 federal census.

The appendices contain various sample census materials, such as a letter of introduction, a standard census form, call-back materials, response category cards, and other materials related to the census. These are samples only; municipalities are free to develop their own census tools.

The methodologies, terms, and techniques for census-taking described in this manual are accepted by Alberta Municipal Affairs for determining the population of municipalities as described in the Determination of Population Regulation.

The statistical concepts and principles reflected in this manual are based on those recognized by Statistics Canada and other statistical agencies.

Important Terms for a Municipal Census

This section contains key terms and definitions for those that are conducting a municipal census. These terms will be referenced throughout the document, and align with the definitions used by Statistics Canada.

Census Date

A census is a snapshot of a community's population at one point in time. A specific census day must be chosen within the timeframe stated in the Determination of Population Regulation. The census date is either the first day of enumeration or a date prior to the start of the enumeration period.

Collective Dwelling

A collective dwelling is a dwelling identified as being of a communal, institutional or commercial nature. It may be defined by a sign or by speaking with the person in charge, a resident, or a neighbour. Examples include lodging/rooming houses, hotels, motels, nursing homes, hospitals, staff residences, communal quarters of military camps, work camps, jails, missions, and group homes.

Enumeration

Enumerating an individual means obtaining their responses to questions in the census questionnaire. If a person is eligible to be enumerated, they should be enumerated at their main or usual residence.

Enumeration Area

An enumeration area (EA) is the geographic area canvassed by one or more census representatives. An EA is composed of one or more adjacent blocks. Enumeration areas are used for census data collection.

Enumeration Period

Alberta municipalities must conduct the census between April 1 and June 30 of the same year.

Household

A household is a person or a group of persons occupying one dwelling. A household usually consists of a family group; however, it may consist of two or more families sharing a dwelling, a group of unrelated persons, or one person living alone.

Neighbour

A person living near or next door to the individual(s) being enumerated. The neighbour should be able to see the person's or persons' home within his private dwelling.

Non-Contacted Dwelling

A non-contacted dwelling is a dwelling where a census worker has not been able to make contact with a member of the household and the enumerator believes the dwelling was occupied by its usual residents on census day. Reasons why contact was not made include “not at home,” “incapacity,” and “refusal to come to the door” on an enumerator visit to the dwelling. This count does not include refusals.

The number of non-contacted dwellings is used in the field report of the Municipal Census Form contained in Schedule 4 of the Determination of Population Regulation.

Private Dwelling

A private dwelling means a separate set of living quarters designed for or converted for human habitation in which a person or group of persons could reside and that

- a) has a source of heat or power; and
- b) is in an enclosed space that provides shelter from the elements, as evidenced by complete and enclosed walls and a roof, and by doors and windows that provide protection from wind, rain and snow.

A private dwelling has a private entrance, either from outside or inside a common hall, lobby, vestibule or stairway inside the building. The entrance to the private dwelling must be one that can be used without passing the dwelling of someone else.

The total number of private dwellings is the dwelling count that is to be used in the field report of the Municipal Census Form contained in Schedule 4 of the Determination of Population Regulation. This includes occupied and vacant dwelling units.

Quality Assurance Checks

Quality assurance checks are random calls made by the municipality to verify that the dwellings have been visited by the enumerator, and provide a check on the usual resident count question.

Refusal

Participation in a municipal census is not mandatory for residents. A refusal is when a household declines to participate in the municipal census. If a member of the household responds to the census question on the number of usual residents living in the household, and not to other questions in the census, the household is not classified as a “refusal”.

The number of refusals is used in the field report of the Municipal Census Form contained in Schedule 4 of the Determination of Population Regulation.

Shadow Population

The shadow population refers to temporary residents of a municipality who are employed by an industrial or commercial establishment for a minimum of 30 days within a municipal census year. Individuals counted as shadow population must reside in the municipality on the census date.

These persons reside in the municipality for a given period of time, but do not consider it to be their usual residence. Post-secondary students are not considered part of the shadow population.

Temporary Resident

A person in the target population (see Table 1, page 14) in Canada who spends the night on census day in that dwelling which is not their main residence, and who has a main residence elsewhere in Canada. The count of temporary residents does not include the shadow population.

Usual Residence

In general, this is the dwelling where a person lives and sleeps most of the time, that is, where they spend the majority of the year – a place one would call home.

If a person has several residences, the main or usual residence is the place where they spend most of the year, except for special circumstances.

Children in joint custody should be included in the home of the parent where they live most of the time. Children with 50 per cent custody in two homes should be enumerated where they spend the night on census day.

If a person does not have a residence on Census Date, the dwelling where they spend the night on census day is their usual residence.

Husbands, wives, or common-law partners who do not live with their families while working, but return to their families periodically (for example on weekends), should consider the residence that they share with their spouse or partner as their usual residence, even if they spend most of the year elsewhere.

Usual Residents

Any person in the target population and whose dwelling is their usual residence, as defined above. Please refer to Table 1, page 14 for a more complete definition of usual residents.

Authority for Conducting a Municipal Census

The authority for conducting a municipal census is contained in the *Municipal Government Act* and the *Determination of Population Regulation*.

Section 57 of the *Municipal Government Act* (MGA) provides the authority for municipalities to conduct a census.

The *Determination of Population Regulation* defines municipal census and usual residence, and provides the timeframe to conduct a municipal census and submit the results to the Minister of Municipal Affairs.

A municipality wishing to conduct a census must keep in mind that the Regulation requires only a count of usual residents. A count of the shadow population can be undertaken in addition to the usual resident count if approved by the Minister. If the municipality decides to collect additional information, it should consider the relevant provisions of the *Freedom of Information and Protection of Privacy* (FOIP) Act, particularly those relating to the collection, use, and protection of personal information. Please see pages 11 and 87 for more information on the FOIP Act.

Municipalities are encouraged to consult with their own legal counsel about the authority and the type of information they would like to collect prior to conducting a census to ensure that their plan is consistent with the MGA and the FOIP Act.

Municipalities should also be aware that the legislative provisions regarding the census may change and municipalities should ensure they are always working with the updated legislation. To find current legislation documents, please visit the Alberta Queen's Printer at

www.qp.alberta.ca/laws_online.cfm

For further information about the MGA or the *Determination of Population Regulation*, please call:

Alberta Municipal Affairs
Toll Free: 310-0000, then dial
Phone: 780-427-2225

Any deviations from the *Determination of Population Regulation* or the prescribed methodologies found in this manual must receive approval from the Minister of Municipal Affairs before the census begins.

Role of Municipal Council

The role of the Municipal Council is to decide whether to undertake a municipal census. This section provides some points to consider while making the decision.

Why undertake a census?

There are many potential benefits of conducting a municipal census in addition to the census conducted by the federal government every five years. With frequent and accurate population counts, municipalities may be better able to plan community services.

Municipalities experiencing high population growth may qualify for additional funding through provincial grants based on population counts. Municipalities may find a new census is warranted if they believe the population has changed significantly since the last federal census.

Using the same methods and asking consistent questions over a number of years will improve the efficiency and cost-effectiveness of the census. This will also allow the municipality to compare population counts and any other information collected over time.

Other considerations

Municipalities may wish to consider:

- whether the benefits of obtaining updated information and/or qualifying for provincial grants outweighs the costs of hiring and training enumerators and conducting a municipal census;
- the current applicability of the last federal census and the amount of time that has elapsed since the last census;
- the opportunity to gather municipal information aside from a population count, including dwelling lists, updated maps, and various demographics (age, sex, etc.);
- whether the municipality is eligible to include the shadow population in their census.

Municipalities should note that any deviations from the census-taking methodologies found in this manual require approval from the Minister of Municipal Affairs prior to undertaking a census.

Métis Settlements

There are eight Métis Settlements in Alberta. Under the *Métis Settlements Act*, the Métis Settlements General Council (MSGC) has the authority to conduct a census within Settlement boundaries.

Métis Settlements do not fall within the definition of a municipal authority according to the *Municipal Government Act*, and they reserve the right to conduct their own municipal census. Métis Settlements conduct their census in accordance with Section 85 of the *Métis Settlements Act*, which allows for the inclusion of Settlement members on leave of absence. However, if a Métis Settlement wishes to have a Settlement count included in the Municipal Affairs Population List, the population count must be undertaken according to the Determination of Population Regulation. The usual resident count submitted to Municipal Affairs from Métis Settlements would need to follow the definition for usual residency (see page 14).

The ministry would consider including members on leave of absence with the population counts, as long as they were on a leave of absence approved by the settlement council for no more than five years before the census, and that the member has executed a written intent to return to the settlement. These conditions will allow members who are away for school and/or internship opportunities to be considered usual residents of the Settlement.

Métis Settlements must complete the Métis Settlement Members on Leave Verification Form, as per the attached form in Appendix F. The form must be properly signed and sworn before a Commissioner of Oaths.

Duty to Submit Results

Completed forms must be submitted to Municipal Affairs by September 1 of the census year in which the census took place. Métis Settlements can submit by:

Scan and Email: lgs.update@gov.ab.ca

Fax: 780-420-1016

Mail: Alberta Municipal Affairs

17th floor, Commerce Place

10155 - 102 Street

Edmonton, AB T6J 2N7

Population reports and forms are all reviewed by Municipal Affairs staff. Métis Settlements may be contacted if there are any discrepancies or if forms are not properly completed. The results have to be accepted by the Minister of Municipal Affairs, and are then included in the annual Municipal Affairs Population List.

Applying the *FOIP Act* to a Municipal Census

A municipality is a local government body, as defined in Section 1(i) of the *Freedom of Information and Protection of Privacy (FOIP) Act*. As a public body subject to the *FOIP Act*, municipalities must collect, use, disclose, protect, retain, and dispose of personal information, including census information, in accordance with the Act.

Section 57 of the *Municipal Government Act* authorizes municipalities to conduct a census. Section 33(c) of the *FOIP Act* authorizes a public body to collect personal information for the purposes of a census. This section authorizes public bodies to collect personal information that relates directly to and is necessary for an operating program or activity of the public body. Municipalities should first determine the types of personal information they need for future planning purposes or for operating certain programs or services, and then collect the information necessary. For example, if a municipality is only interested in a population count, it would not need to collect employment or educational information about its residents. However, if the municipality is determining whether a recreation facility needs to be built, or the future transportation needs of its population, the municipality may also collect additional information such as age, family structure, or location of employment.

The *FOIP Act* provides that municipalities should:

1. collect only the personal information they need to operate an authorized program or activity of the public body;
2. use and disclose information only for those purposes for which it was collected; and
3. safeguard the information they collect and retain.

Enumerators should address their FOIP questions to the census coordinator. Census coordinators requiring FOIP information should contact their municipal FOIP office.

Additional FOIP information can be found in Appendix G, page 87.

For further information, go to the Service Alberta website at: <http://www.servicealberta.ca/FOIP/>

Mandatory Requirements and Optional Guidelines

This manual contains both mandatory requirements and recommended guidelines for conducting a municipal census.

Mandatory Requirements

The Determination of Population Regulation sets out the following mandatory requirements.

The census must be conducted between April 1 and June 30 of the same year. In a federal census year, the municipality has the option to conduct the municipal census from March 1 to May 31 or May 1 to July 31 of the same year.

Before performing their duties, the census coordinator must take and subscribe to an Oath; the enumerators must subscribe to a Statement (Appendix A). The Oaths and Statements are valid for the person's lifetime.

- The census must count the total number of usual residents in the municipality.
- A shadow population count must have prior approval from the Minister of Municipal Affairs.
- The census must use one of the prescribed census-taking methodologies in this manual (online census, telephone interviews, mail-out surveys, enumerator interviews at the door, or “hybrid”).
- The census must undertake quality assurance activities (see page 28).
- The census results must be reported to Municipal Affairs, including an affidavit and field report by September 1 of the census year (see page 30).
- The census must comply with the *FOIP Act*.

Any deviations from the Determination of Population Regulation or prescribed methodologies in this manual require approval from the Minister of Municipal Affairs prior to undertaking a census.

Guidelines only

To assist municipalities, the manual also contains some guidelines that can be used in conducting a municipal census. Municipalities are free to:

- ask additional census questions aside from the mandatory count of usual residents, in compliance with the *FOIP Act*;
- design their own census materials (maps, Notice of Visit cards, enumerator photo identification, census forms, websites, and other supporting materials and tools);
- report the results of the census to the public (see page 31); and
- have the coordinator manage the census as they see fit (delegating responsibilities as necessary, supervising enumerators, etc.), as long as they comply with the mandatory requirements.

Conducting a Municipal Census

Understanding Enumerating

Enumerating an individual means obtaining their responses to questions on the census. Usual residents should be enumerated at their main or usual residence. For example, a family who stayed at their cottage during an enumerator visit, but has their main residence elsewhere, should be enumerated at their main or usual residence.

A municipal census includes all usual residents of a municipality. The following table highlights who is included and excluded in a municipal census.

Table 1: Who is Eligible to Be Enumerated

Belong to the Target Population: Enumerate	Do Not Belong to the Target Population: Do Not Enumerate
<ul style="list-style-type: none"> • Canadian citizens (by birth or naturalization). • Landed immigrants (persons who have been granted the right to live in Canada permanently by Canadian immigration authorities). • Persons from another country with a work or study permit and family members living here with them. • Persons in Canada who claim refugee status and family members living here with them. • Babies born before the census date. • Persons who died on or after the census date. 	<ul style="list-style-type: none"> • Resident of another country, province or municipality (for example on vacation or on a business trip). • Government representatives of another country who are assigned to an embassy, a consulate, a high commission, or any other diplomatic or military mission, and family members living here with them (unless family member(s) are considered usual resident(s)). • Members of the armed forces of another country who are stationed in Canada, and family members living here with them (unless family members are usual resident(s)). • Babies born on or after the census date. • Persons who died before the census date.

Statistics Canada (2016). Enumerator Non-Response Follow-up Training Workbook Form 55W-E, p. 14

Just because a person is eligible for enumeration does not mean they should be enumerated at the address. Table 2 serves as a guide to determine where to enumerate those who are eligible.

Table 2: Where should individuals be enumerated?

If the person...	Enumerate them:	
Has one residence	<p>At their usual residence, even if they are temporarily absent. This is their main residence.</p> <p>Be sure to enumerate all persons who live at this address, including roommates, lodgers, employees, persons who moved in before census date, etc.</p>	
Has more than one residence	<p>At the residence where the person spends most of their time; for persons who spend equal time at each residence, or if unsure which to choose, include them at the address where they spent census day. If the residence where they should be enumerated is not in the municipality, these persons should not be enumerated.</p> <p>Example: Children in joint custody or persons staying at a cottage or secondary home.</p>	
	If the person is:	Then enumerate them:
	<p>A student who lives elsewhere during the school year or for their summer job but returns to live with their parents during the year.</p> <p>Example: on weekends, semester breaks after completing their studies.</p>	<p>At the residence of their parents even if the student spends most of the year elsewhere.</p>
	<p>A spouse who is temporarily absent because of their work or studies but periodically returns to their family's residence.</p> <p>Example: on weekends or days off from work, etc.</p>	<p>At their family's residence even if the spouse spends most of the year elsewhere.</p>
Has no main residence	<p>At the residence where they stayed on census date.</p> <p>Example: in transition between two residences, no fixed address, etc.</p>	
Is in an institution	If the person:	Then enumerate them:
	Resident less than 6 months from the census date.	At their main residence.
	Resident for 6 months or more.	At the institution.
	Was admitted on any date and has no other place of residence.	At the institution.

Statistics Canada (2016). Enumerator Non-Response Follow-up Training Workbook Form 55W-E, p. 15

Census Methodology

Municipalities have some flexibility in how they choose to conduct a census. Following is a brief summary of each census method approved for use by Municipal Affairs:

Electronic Census - Online

- Municipalities are moving towards conducting an online census. With this method, a Secure Access Code (SAC) for the census is mailed or delivered to all dwellings, along with a link to the census website.
- The respondents visit the website, which allows them to complete the census form online. The responses are automatically entered into the census central database. This means that the online questionnaire does not require an in-person interview.
- Enumerators are still needed to complete in-person interviews with individuals from households who do not complete the census online.

Telephone Interviews

- Residents can be given the option to call a Census Help Line to complete their questionnaire over the telephone.
- Municipalities can also choose to call dwellings to complete a telephone interview if they have phone numbers.

Mail-out Paper Census Forms

A municipality may choose to send out paper questionnaires. These questionnaires, along with instructions, can be sent out through Canada Post or be delivered door to door by enumerators.

- A mail out questionnaire should have clear instructions and be easy to follow. It should be concise and ask only pertinent questions.
- Develop a mailing list for all residential properties. This requires that municipalities can link a mailing address for each residential street address. Municipalities can mail-out the questionnaire package or have enumerators deliver the survey to the street address.
- Set a completion date so the questionnaires can be returned in a timely fashion and can be included in your database.
- Consider including a Business Reply Envelope with the survey. People are more likely to mail back their questionnaire if they do not have to pay postage.

- Consider sending out a follow-up letter or postcard with another questionnaire to remind respondents to complete the census.

Interviews at the Door

- Enumerators conduct the interview in person and record the responses on paper forms using a pen or pencil or on an electronic device such as an iPad.

For further information on census methodologies, terms, and techniques, please call:

Alberta Municipal Affairs
Toll-free: 310-0000, then dial
Phone: 780-427-2225

Hybrid

- When conducting a census, municipalities are free to choose any of these census enumeration methods, or some combination of the four (a “hybrid” system). This manual includes instructions for all of these approved census-taking methods.

Census Coordinator General Responsibilities

Once a municipality decides to conduct a census, the first step is to hire or assign a census coordinator to oversee and organize all aspects of the census. The duties of a census coordinator differ by municipality. Some roles discussed in the following pages may pertain to your particular situation, while others may be the duty of administrative staff, enumerators, or others. Duties may also vary depending on the type of census conducted (paper-based, electronic, or hybrid).

Oath of Census Coordinator

As a coordinator, you are required to take an Oath (Appendix A). This Oath says that you will act diligently, faithfully and to the best of your ability, ensure that personal information is not disclosed without authority, and you will undertake the census according to this Municipal Census Manual. The Oath made by the Census Coordinator is **good for the lifetime** of the person making the oath.

Your Responsibilities

A coordinator is responsible for the successful completion of the census. Depending on the size of the municipality, the coordinator may be an enumerator, or may have several enumerators working for them to support the census.

The coordinator's responsibilities could include:

- informing residents about the census;
- preparing the census (creating maps and a tracking system to monitor coverage);
- hiring and training enumerators;
- supervising the enumerators;
- managing the census;
- ensuring data security measures are in place;
- undertaking quality assurance activities;
- collecting and analyzing census data;

- reporting census results to Municipal Affairs by September 1 of the census year.

Preparation

Before a census can begin, the coordinator may arrange an initial mail-out or delivery to all households. For an online census, each letter or notification must contain a link to the census website and a Secure Access Code (SAC) that the respondent will use to gain access to the online form.

The SAC performs the following functions:

- provides a secure way for each household to access the form;
- ensures that census information can only be entered once for each dwelling.

The letters or notifications delivered to the respondents should contain specific instructions for completing the census. For an online census, there should be clear instructions on how to access the website and enter the SAC. For those who cannot or would prefer not to enter the information online, the letter should contain a phone number to contact. It should also include a statement saying that an enumerator will come to complete the form in-person if the dwelling does not complete the census form online by a given date.

Informing Residents about the Census

Participation is key to a successful census. Since a municipal census is not mandatory for residents, it is essential to increase participation through public awareness. Inform residents of the following:

- Why a census is taking place, and the benefits of census data to the municipality and its residents.
- How to complete the census online, by phone, or by mail.
- Dates an enumerator will visit residences if census information is not submitted.

This can be done using media, such as television and radio announcements, newspaper ads and articles, mail-outs, posters on community billboards/bulletin boards, and web-based or social media, such as online newspapers, Twitter, or Facebook.

Providing information on the municipal census to residents includes them in the process and also informs them why their participation is valued.

Enumeration Areas

As a starting base, municipalities can use their property tax information to gather a list of all residential properties within the municipality. Some municipalities may have an address registry from their previous census which may contain suites within dwellings that are not included in the property tax information.

Before enumerators are hired, the municipality needs to be divided into Enumeration Areas (EAs) to determine how many enumerators are needed for the census. EAs are small areas within the municipality that are established to collect and analyze information for various planning applications.

The number of dwellings an enumerator can visit in a single day will largely depend on the population density of the municipality, the estimated number of interviews to be made, the timing of the visit (daytime, evening, weekend) and the length of the census questionnaire. For example, an enumerator assigned to densely populated apartment blocks will likely visit significantly more households per day than an enumerator assigned to a sparsely populated rural area. However, populated apartment blocks may contain dwellings that will require more call-backs.

Enumeration maps can be made using a variety of maps. Some examples include county maps for rural municipalities, and ward maps for urban areas. Another option is to obtain the enumeration area maps from Statistics Canada used for the most recent federal census.

Preparing Census Materials

Municipalities use a variety of census materials to conduct a census. Examples include enumeration maps (these require regular updating), Notice of Visit cards, census forms, identification badges, letters of introduction, and others. In some cases, census coordinators may be able to use materials from a previous census. Otherwise, coordinators may be responsible for developing or updating census materials for the enumerators.

If using wireless devices such as an iPad

- include how to use the wireless device as part of your enumerator training;
- inform enumerators that the device should be fully charged each day;
- provide enumerators with external charging devices while in the field; and
- provide them with paper forms, in the event of a wireless device failure or a gap in wireless service.

Hiring and Training Enumerators

Often, census coordinators are involved in the hiring and training of enumerators for their municipality.

When the required number of enumerators is known, job postings can be placed in newspapers, job search websites, municipal letter inserts (e.g., utility bills), and/or social media websites. Recruitment could also target educational institutions with students who may be looking for a part-time or short-term job.

Qualities to look for in potential enumerators include professionalism, accuracy, attentiveness, and a friendly demeanour. Enumerators must be able to walk long distances, work for many hours at a time, and manage adverse weather conditions.

Enumerators will become liaisons between the municipality and residents, and are key in the success of any census.

After the enumerators have been hired, the census coordinator must train them to carry out the municipal census. For the coordinator, this involves careful study of the Municipal Census Manual, and familiarity with the Determination of Population Regulation and the sections of the *FOIP Act* that apply to the census. A thorough knowledge of the residency definitions and a plan of how the census will be organized and undertaken are important.

Enumerators must understand the rationale for each question in the census, what the results will be used for (i.e., future programs, infrastructure), and how to handle personal information. Enumerators must be trained on how to answer questions from residents and how to direct queries to the census coordinator if necessary.

The training session generally takes two to four hours and the enumerators are often paid to attend. In addition to a verbal training session, the enumerators should be given copies of the Municipal Census Manual for review prior to, and use during enumeration. The coordinator should be prepared to answer questions regarding the manner of enumerating and the challenges involved.

After training, it is useful to have the enumerators practice the actual process.

Security of staff, offices and census documents

The health and safety of employees come first, both in the field and in the office. Ensure that all census workers have read and discussed health and safety best practices.

Security of office space and census documents is critical to the integrity of and success of the census. The following is a list of guidelines that can be used by your municipality as part of enumerator training.

Do:

- Wear your identification card whenever you are performing census duties.
- Keep pre-printed, blank, and completed questionnaires separated.
- Lock questionnaires or other census material in your car trunk, or if this is not possible, out of view, while conducting delivery or field visits on any enumeration work.
- Store questionnaires and/or wireless devices in a secure place at home or in an office, preferably under lock and key.
- Report any suspected or actual security violations to your supervisor.
- Use a private telephone whenever you are performing census work.
- Report the loss or theft of any census documents to your supervisor immediately.

Do not:

- Share information about respondents with anyone other than census employees who need to know the information and are sworn to confidentiality.
- Discuss information about an individual unless you are speaking directly to that person.
- Leave census documents in your car overnight.
- Allow anyone, including members of your family, to access questionnaires or other census materials.
- Discuss confidential matters in public places.

Ensure that enumerators are aware that any breach or violation of security must be reported immediately to a supervisor. It is critical that action be taken as soon as possible to protect the information.

Incident Reporting

As census coordinator, you have a responsibility to ensure your own health and safety, and also to ensure your enumerators take all reasonable precautions to protect their health and safety.

You are to help your census workers understand they are all responsible and accountable for health and safety in the workplace.

When an enumerator suffers an accident, illness or other type of health and safety incident during their duties, you must address health and safety issues in a knowledgeable and informed manner, by closely following the incident reporting procedures set out by your municipality.

Supervising

During the enumeration period, the coordinator needs to manage the enumerators and the census. Coordinators may take on various supervisory roles. For example, they may handle questions from enumerators, or questions from residents through the enumerators. They may also be responsible for ensuring that interviews are conducted properly so census forms are filled out correctly.

One approach is to check the first five to 10 census forms from each enumerator. In larger municipalities with more enumerators, the coordinator may not have the time to check this many forms and may need to hire additional staff to assist with quality control.

Questions and comments can be addressed early in the enumeration process. However, quality control processes should continue over the entire collection period on a random basis, since enumerators may develop interviewing short cuts over time.

Preparation is key to a successful municipal census.

Managing the Enumeration Process

Census coordinators are responsible for managing the enumeration process. Coordinators may also be responsible for monitoring and tracking the enumerators' progress to ensure data are collected accurately and efficiently.

The following sections contain information on how to manage this enumeration process.

Overseeing and tracking the enumeration process

- Create a system to track enumeration progress. This could include a master list recording all the pre-numbered census forms returned to the census office. Another possibility is creating a municipal map showing all properties, which can be marked off once forms for those properties are returned. For larger municipalities, it may be necessary to create one map per ward or region within the municipality. This will provide a picture of progress, speed of coverage, and response rates. Since these maps may be outdated, there must be a system in place allowing enumerators to add any new dwellings they discover to the map(s).

- If a paper-based census is conducted, create a “desk-checking” system where all completed census forms are examined when enumerators return them to the census office. Check that all information is present. Depending on the scope of the census (number of dwellings), the coordinator may be able to do this daily. The coordinator should “spot check” forms by reviewing a small randomly selected sample of forms daily to catch missing information or obvious errors.
- Track enumerators’ errors on an ongoing basis. This enables the coordinator to monitor enumerator error rates and, if necessary, arrange for timely retraining or replacement of enumerators.
- Track respondent refusals per enumerator on an ongoing basis. Refusals will occur because the municipal census is voluntary; however, a high number of refusals may indicate specific enumerators need assistance, retraining, or replacement.
- Track and make note of the issues encountered in each enumeration area, so issues can be addressed proactively for the next census. Some areas may show higher than average non-response rates due to type of household (e.g., high number of younger single residents who are hard to catch at home, people who may have language difficulties, or people who are wary of “official” inquiries).
- Take steps to ensure enumerators do not visit a residence that already completed the census. Coordinators should regularly check for completed interviews (telephone, online or mailed census forms) and update records so enumerators are aware of residences (per enumeration area) that no longer require an interview. This requires regular communication between enumerators and the coordinator (or other staff, as appropriate). Larger municipalities may require a database of residences that have completed the online census, which enumerators would need to check periodically.
- Consider including a “translation book” with the questionnaire translated into a number of languages if appropriate for your municipality. This will assist in dealing with language barriers.

Managing Completed Interviews and Enumerator Visits

Municipalities may choose to use online or mail-out questionnaires to collect census information. While many households will complete the questionnaire on their own, field and telephone follow-up will still be necessary to complete the response to the census.

Proper tracking of enumerator visits to dwellings is critical to the success of the municipal census. If no one is home on the first visit, it is very important that the enumerator leave a Notice of Visit

card at the residence, and record the address in the Call-back Tracking Form (see Appendix B). Each Notice of Visit Card should have a unique reference number. In the event that the call-back takes place over the phone, municipal census office staff will need to ask for the address and reference number left on the Notice of Visit Card. If the address and reference number match those in the Notice of Visit form, the municipal census office staff will have confirmed the response is coming from the correct dwelling.

Call-backs are the additional calls or visits made by enumerators after leaving a Notice of Visit Card. The municipality decides whether these call-backs will include in-person interviews or telephone interviews.

It is also important to manage call-backs and field visits so enumeration of the area is not delayed. Suggestions for managing call-backs include:

- Enumerators should typically do at least three or more call-backs per dwelling unit. Areas with lower response rates may require more call-backs. As one option, census coordinators could track the number, time, and date of planned visits per enumerator and maintain a schedule for each enumerator. Alternatively, enumerators could take responsibility for managing their call-backs. In general, the coordinator is free to manage this process as they see fit.
- Ensure the times are different for each visit. If a morning visit is unsuccessful, try an afternoon or evening visit. If weekdays or evenings do not work, enumerators should try weekend visits.
- Choose your best enumerators to re-contact households that are difficult to contact. You should aim to have the highest completion rate as possible.

Planning for efficient enumeration

Using lessons learned from previous censuses can help avoid potential pitfalls in future censuses and improve efficiency of the enumeration process. Following are some tips on carrying forward these lessons:

- Prepare a letter of introduction for all enumerators to carry. This letter identifies the enumerator as an official census taker and assures the confidentiality of all information collected. Enumerators can show the letter to respondents to legitimize the census and improve response rates. A sample is included in Appendix B.
- Compile a list of enumerators and their enumeration areas so this can be carried over into the next census. Efficiency may be improved by assigning an enumerator to the same area they

previously covered. These enumerators will have knowledge of the area and may have a greater rapport with residents.

- Compile a list of issues or challenges that occurred and record actions taken in response. This could help avoid the same problem(s) in a future census.
- Estimate the time required to complete each enumeration area, including travel distance within the area and the number of visits in the area during the previous censuses. If you do not have data on field visits, check the previous census data for the number of neighbour responses per enumeration area, if available.

Collection and Analysis of Census Data

Listed below are several key roles that census coordinators and enumerators play during the collection and analysis of census data:

Collecting Personal Information

“Personal information” is defined in Section 1(n) of the *FOIP Act* as recorded information about an identifiable individual, including the individual’s name, home or business address, telephone number, age, sex, marital or family status and information about the individual’s educational, financial, or employment history, etc.

Enumerators are collecting personal information during a municipal census. They are collecting individually identifiable information when attaching a name or other identifier to the information being collected.

Personal information can only be collected from a responsible adult (18 years old and up) in the dwelling. Coordinators should direct enumerators to ask to speak to adults, and if one cannot come to the door, to ask when an adult will be home. Notice of Visit Cards should be left for residents who are absent at the time of enumeration.

Review and Processing of Forms

The census coordinator is responsible for the accuracy and collection of all forms. This includes managing electronic forms as well as any paper-based forms from in-person interviews. It is suggested that the coordinator review the first five to 10 completed paper or electronic forms from each enumerator to ensure they are being completed accurately. It is important to continue checking forms on a random basis throughout the census to ensure quality. Depending on the size of the municipality, the coordinator may require additional staff to do this.

Data collected using wireless devices or a website, are automatically sent to a central database. Respondents enter their Secure Access Code and their complete address to begin the online questionnaire. The website may have other security features in place. The complete address is an identifiable piece of information, but it is only collected for the purposes of a reverse record check or follow-up if there is a problem with the form.

Any data collected from paper-based forms must be transferred to electronic files. Smaller municipalities may be able to do this in-house, but may also outsource the data entry to data processors. In this case, to address privacy concerns, the processors should sign a statement regarding the treatment of personal information. The processors must dispose of personal information in accordance with municipal policies and procedures.

Analysis

Many types of analysis can be performed on the electronic data. This can also be done either in-house or contracted out. As with data processors, the contractors would need to sign a statement regarding the treatment of personal information. Again, they would need to dispose of personal information in accordance with municipal policies and procedures.

Reports may contain items such as frequencies (eg. number of dwellings by type, age group, and sex distribution) or averages (income, age). Histograms and pie charts may also be included to show distributions. Some municipalities prepare reports and place them on the internet. Note that personal information should not be analyzed or reported to ensure confidentiality and anonymity.

Retention of Census Forms and Information

Under Section 38 of the *FOIP Act*, municipalities must protect census information by making reasonable security arrangements against such risks as unauthorized access, collection, use, disclosure, or destruction. Census enumerators are required to sign a Statement of Census Enumerator, outlining the information and privacy-related procedures they must adhere to. The Statement of Census Enumerator is **valid for the lifetime** of the person making the statement.

Census information needs to be protected throughout its life cycle, from the time it is collected until it is properly disposed of. For electronic forms, or for electronic data created from paper-based forms, there should be passwords and/or user verification protocols in place for accessing the data. If any information is stored online, using a firewall in addition to passwords will improve security. Municipalities may also consider using a protocol where encrypted data is transferred over a secure connection (HTTPS certification). Security measures will vary by municipality.

After the approved retention period, the information should be properly disposed of in accordance with the municipality's records retention policies and procedures. If personal information has been

collected, particular care should be taken with respect to its deletion. FOIP personnel in each municipality can play a significant role in managing this process.

Quality assurance

Quality checks are an important part of supervising enumerators and ensuring high quality results for the census. The enumerator must make arrangements to have their completed work sent to you on a regular basis. The coordinator may arrange for enumerators to deliver completed census forms to your office or you may arrange to pick up completed forms. Tasks that may be undertaken by the coordinator include:

- Identifying enumerator mistakes early and quickly by checking the completed census questionnaires. All forms submitted by enumerators should be checked daily for completeness and accuracy.
- Conducting field visits with your enumerators. Observe your enumerators performing the interviews.
- Ensuring that enumerators complete their work quickly and efficiently. Check the progress made in relation to both the time available and the progress of other enumerators.
- Monitoring the hours worked by enumerators daily to ensure sufficient hours are worked each day at the appropriate time of day.
- Discussing performance issues with enumerators as quickly as possible. Low productivity and poor quality work slows the progress of enumeration and cause additional work for others.

Tracking Dwellings

While the census is being conducted, census coordinators must verify that every dwelling has been contacted, and re-contacted as needed to secure a completed census questionnaire. The occupancy status (occupied or not occupied) on census day should be noted for each address. In some cases, an address may represent more than one household. Additional census questionnaires should be available to enumerators to conduct interviews for all dwellings at that address.

Monitoring Enumerator Performance

Being part of the census can be daunting for some enumerators. Monitor their work on an ongoing basis, and provide guidance to help them feel capable and confident. If problems arise, they can be corrected immediately before the error becomes systematic.

Census coordinators should keep a close eye on the productivity of enumerators on a daily basis to identify problems and issues that require corrective action. Completed census questionnaires must be reviewed daily for completeness and accuracy.

Municipalities are required to perform quality assurance checks by randomly contacting dwellings that were **enumerated by an enumerator visit**. The calls verify that the dwellings have been visited by the enumerator, and provide a check on the usual resident count question. Households that completed their surveys online do not require this quality assurance check. The following table shows the number of households that must be contacted for quality assurance checks.

Table 3: Required Number of Residents to Contact for Quality Assurance Checks*

Number of Census Forms Completed by Enumerators	Number of Households to Contact
3,501-5,000	357
5,001-7,500	365
7,501-10,000	370
10,001-25,000	378
25,001-50,000	381
50,001-75,000	382
75,001-100,000	383
100,000+	384

*based on a 95 per cent confidence interval with a 5 per cent margin of error.

Municipalities with enumerator-completed dwellings of 3,500 or less are required to contact 10 per cent of these dwellings completed by enumerators.

When contacting the dwelling, keep in mind that the individual may not know whether the dwelling completed the census. For example, they may say the dwelling was not enumerated, but might not be aware that another member of their family completed the census. If the individual says the

dwelling was not enumerated, ask whether it is possible another family member completed the census interview. If they are unsure, ask the respondent if they would take part in the census interview to ensure that the collected information is valid.

The calls should be distributed across all enumeration areas of the municipality and enumerators. Calls should be made within two to three weeks of a questionnaire being completed.

The main purpose of this check is to ensure the quality of the census results, not to assess the performance of enumerators. However, if the coordinator notices discrepancies in more than three per cent of a particular enumerator's cases (occurrences of non-contact or wrong information), the enumerator may require follow-up training.

In these cases, there should be an additional round of calls (10 per cent) within the area covered by that enumerator to confirm that the collected information is accurate. Coordinators should keep records of their quality control strategies.

Enumerators must be made aware that quality assurance checks will be completed during the census period and up to August 31 of the same year in which the census occurred.

Data Quality

Municipalities are required to report the results of their census using Schedule 4 (Municipal Census Form), attached to the Determination of Population Regulation by September 1 of the municipal census year.

To ensure that the population count is valid and reliable, a Field Report is included in the Municipal Census Form. Municipalities are required to note the number of dwellings, the number of non-contacted dwellings, and the number of refusals, onto the form.

Municipal Affairs calculates a non-response rate $((\text{non-contacted dwellings} + \text{refusals}) / \text{number of dwellings})$. Municipalities with a non-response rate of five per cent or more may choose to contact the Minister of Municipal Affairs, and request that the municipal population count from the previous Municipal Affairs Population List be used in the upcoming Municipal Affairs Population List.

Reporting to Municipal Affairs

The Determination of Population Regulation requires that after completing a census, the municipality must submit the results to the Minister of Municipal Affairs by September 1 of the year in which the census took place.

Usual Resident Count

The designated officer must sign the Municipal Census Form contained in Schedule 4 of the Determination of Population Regulation for usual residents only. On the form, the designated officer is swearing that a municipal census was completed, states the chosen municipal census date, and reports the total usual resident count obtained. The census form has to be properly signed and sworn before a Commissioner of Oaths.

For quality assurance purposes, municipalities must also complete the field report on the form, which contains the usual resident count of the municipality, total count of private dwellings, total number of non-contacted dwellings, and total number of refusals. Please note that these should be actual counts obtained from the census. Do not provide extrapolations or estimates for these statistics.

Shadow Population Count

Municipalities that have received prior approval from the Minister of Municipal Affairs to conduct a shadow population count along with their municipal census must complete the Shadow Population Verification Form, as per Schedule 3 of the Determination of Population Regulation. The form has to be properly signed and sworn before a Commissioner of Oaths.

Duty to Submit Results

Completed forms must be submitted to Municipal Affairs by September 1 of the census year in which the census took place. Failure to do so may result in your census figures not being accepted.

Municipalities can submit by:

Scan and Email: lgs.update@gov.ab.ca

Fax: 780-420-1016

Mail: Alberta Municipal Affairs
17th floor, Commerce Place
10155 - 102 Street
Edmonton, AB T6J 2N7

Population reports and forms are reviewed by Municipal Affairs staff. Municipalities may be contacted if there are any discrepancies or if forms are not properly completed.

The results must be accepted by the Minister, and are then included in the annual Municipal Affairs Population List.

Reporting to the Public

While not mandatory, municipalities could consider releasing reports on census results under certain conditions. These reports would increase residents' access to the census results, and may encourage future participation in the census. The reports would need to comply with the *FOIP Act* and must not release personal information, such as names, addresses, or personal contact information.

If the municipality decides to report to the public, it should consider the size of the population and its neighbourhoods. Suggested guidelines for releasing reports to the public include the following:

- For municipalities with more than 1,500 in population, and neighbourhoods with at least 50 residences, release the census counts by neighbourhood. The reports should contain the neighbourhood counts only and not other information such as age and sex compositions of the neighbourhoods.
- For communities with more than 5,000 population, and neighbourhoods with more than 100 residences, release the census counts by neighbourhood, but feel free to include other information. The reports could contain both neighbourhood population and dwelling counts, as well as age and sex compositions. If more detailed breakdowns are included, ensure that data groupings do not reveal confidential information about respondents.

The Role of Census Coordinator for Managing an Online Census

With an online census, many respondents complete the census form on the census website. While this reduces the number of census enumerators needed for in-person interviews, the census coordinator will still require enumerators to conduct census interviews when individuals do not complete the census online. For example, some dwellings could be unoccupied. In other cases, individuals may forget to complete their online form, may not be comfortable entering the information online, or may not have access to the internet. In these cases, enumerators must still attempt to conduct the interview in person or over the telephone.

An online census has many potential benefits compared to mail and telephone survey methods such as:

- reduced need for paper and paper storage (census forms, call-back forms, etc.);
- reduced need for enumerators;
- improved data security (with passwords and firewalls in place);
- reduced errors made by census staff (enumerators entering responses incorrectly);
- enhanced monitoring of enumeration progress and identification of dwellings still needing enumeration;
- census responses are monitored in real time;
- little or no manual data entry;
- convenience for respondents, who may complete the online form at a time of their choosing;
- more assurance of respondent privacy (respondents are sometimes more willing to answer questions about education and income through an online form rather than with an enumerator); and
- more efficient administration of the census.

An online census also has some potential challenges, including:

- development of an online web application and census form that is secure and stable;

- generation of a unique Secure Access Code (SAC) for each dwelling can present programming problems;
- creation of secure databases (address register, census responses) requires appropriate skills;
- implementation of security procedures (passwords, firewalls, HTTPS certification);
- obtaining responses from individuals without easy access to the internet, or without the technical knowledge required to use the internet; and
- licensing fees (operating systems such as Windows, SQL database etc.).

Minimum requirements of an online census

The specific features of an online census will vary by municipality. However, certain features must be in place for the online census to be considered. These features are described below.

Secure web application and census form

Respondents must be able to access the census website, log in, and answer all of the questions on the census form. This requires a reliable and secure website containing all of the questions a municipality wishes to ask. There must also be security measures in place (such as passwords and firewalls) to protect census information stored online. While some municipalities may have staff with the technical knowledge to develop the website and security measures, others may have to contract the work to an external consultant or technical expert.

Electronic address database

Municipalities should maintain an address database for the census. This will allow the municipality to monitor which dwellings have completed the online census. The census coordinator or staff member managing the database must have the ability to add new addresses during the census in the event that new dwellings are enumerated. Census responses will be linked to each address in the database.

Secure Access Codes (SACs)

Before the census begins, a series of unique SACs should be generated and linked with each address in the electronic register. When the census begins, these SACs will be mailed out or delivered to the appropriate addresses, along with a link to the census website. When the respondent accesses the website, it should prompt them for their address and SAC before asking

the census questions. This verifies that the response is coming from the correct dwelling, and also provides an easy way to track which dwellings have completed the online census.

In-person enumeration procedures

Not every private dwelling will have a respondent willing or able to complete the online census. Some respondents may not have easy access to the internet, and others may be uncomfortable entering the information online. Other private dwellings may be new and not yet part of the address database with an assigned SAC. This means that a number of responses will need to be collected in person or by telephone. This process requires enumerators and either paper-based census questionnaire forms or wireless devices with a digital version of the census questionnaire.

After receiving the mailed notice letter and SAC, enumerators may begin to visit private dwellings that have not completed the online census. Some municipalities launch their online and door-to-door interviews at the same time. Others have opted a two to four week time period for the online census, and then begin their telephone or door-to-door interviews.

Use the address database to determine which dwellings have not yet responded. Enumerators should be informed when a private dwelling in their enumeration area completes the online form, so the enumerator does not visit that private dwelling unnecessarily.

If an enumerator reports a new private dwelling or a dwelling not in the address database, the new address should be entered in the database and assign a SAC. Mail out or deliver the SAC to the dwelling, with instructions on how to complete the online questionnaire, or have the enumerator complete the interview in real time.

The in-person enumeration forms need to be entered by census staff as if they were using the online system. This means that a SAC needs to be generated for all dwellings.

Suggestions for conducting an online census

The following are suggested procedures for preparing an online census, minimizing risks, and enumerating the population.

Before you begin

- Develop the web application, online census form, address database, security procedures, and a SAC generator (using external resources when needed).
- Generate the SACs and match them to all the dwelling addresses in the database.

- Test the census website extensively. Enter addresses and census data and make sure there are no problems with the website or database. Use extreme values to test the ability of the software to screen out of range and obviously invalid data. If using wireless devices test them and make sure that the municipality has reliable wireless coverage.
- Delete all test data before the actual census begins.
- Mail out or deliver the SACs to the dwellings. Include an explanation of the census, instructions for how to access the website, and suggestions for those who do not have Internet access (direct them to local libraries, etc.). Inform them that an enumerator will come in person to complete the interview if the online questionnaire is not filled out.

Risk mitigation

Census websites may temporarily go down. If possible, have a staff member on call to deal with this as quickly as possible.

- The database may crash or become corrupted. Back up the database daily to prevent losses.
- Ensure that the wireless device has the capacity to store census data if connectivity is lost. This can be especially problematic in rural areas.

Managing Enumeration

- When the census begins, monitor the address database to keep track of which dwellings are completing the online census. Look for systematic errors, which may indicate a problem with the questionnaire.
- To maximize efficiency of the online census, begin sending enumerators to visit dwellings that have not completed the online census form.
- Inform enumerators when a dwelling in their enumeration area completes the online form, so enumerators do not visit the dwelling unnecessarily.
- If the system does not allow enumerators to enter new addresses in real time, enter the new address in the database and assign the address a Secure Access Code. Mail out or deliver the Secure Access Code to the dwelling, with instructions on how to complete the online questionnaire.

Designing a Census Questionnaire

Census questionnaires are a set of questions, in some cases with predefined answers, to gather aggregate information about the population. A municipality must decide what type of information they need to know about residents, and how that information will be used for planning and delivering services to residents.

Proper questionnaire construction is one of the most important steps in achieving a successful census. Good design will help to increase the willingness of residents to complete the census, as well as improve the accuracy of the data collected.

When it comes to designing a questionnaire, asking the right questions in the right way is crucial to collecting the data you need for decision-making. It is critical that each question is clear and reflects what you are asking and how you want it answered. For example, if you ask the question “What is your income?” respondents will not know whether you mean weekly, monthly or annually.

Questionnaire design requires work in choosing the type of questions, wording, answer choices provided and various other factors which contribute to a high-quality questionnaire instrument.

To reduce the burden on census coordinators, and to improve the quality of information collected, municipalities may use the same questions as the 2016 federal census. The 2016 federal census form can be found here: http://www.statcan.gc.ca/eng/statistical-programs/instrument/3901_Q8_V1-eng.pdf

A tracking system needs to be in place to link the questionnaire to the residential address. Each questionnaire should have:

- a unique form number. A form number for each response must be allocated and recorded so that it links back to each dwelling in the municipality. This task is usually the responsibility of the census coordinator.
- the appropriate residential address. Municipalities should have a complete listing of all residential addresses from property tax information. For urban addresses, include the street name or number and house number, as well as the appropriate apartment (suite) number where applicable. If there is any question about the address, check with the residents during the interview.

For rural addresses, include the legal land description (quarter section, section, township, range, and west of meridian) and the dwelling location (farm, country residential parcel, hamlet, mobile home park, or other location). Some of this information will be outlined on

your enumeration area census map, but in all cases confirm the information with the resident.

- **Telephone number:** Each census form may contain a telephone number that can be obtained from different sources such as utility bills and property tax information. This information can be used if telephone interviews are an option for collecting census information.
- **Usual resident count:** A municipal census must include a question to count the total number of usual residents in a municipality.
- **Quality assurance information:** Municipalities are required to conduct quality assurance checks with a sample of households that complete the census through in-person or telephone interviews with an enumerator. Municipalities may request the name of the respondent, email address, telephone number, and an appropriate time to call to verify the census information.

Suggested Wording for Questions

Usual Residents Count

The primary purpose for conducting the census is to produce a total population count of usual residents. That count provides the basis for calculating per capita provincial grants for municipalities.

To obtain the number of residents usually present, ask the question:

Including yourself, how many persons usually live at this address on (census day)?

Quality Assurance Questions

Municipalities are required to conduct quality assurance interviews with households that completed their interviews with an enumerator.

The municipality is required to conduct interviews with some residents to verify the accuracy of information collected. Can we contact you at a later date?

Can I please get your name and phone number?

Optional Questions

Municipalities may choose to ask additional questions to obtain a profile of their residents. More detailed information may be required for housing, land use planning, economic development, recreational facilities, etc.

1. Person Number

To obtain additional census information, you would require a list of every member of the dwelling unit in sequential order on the census form (person 1, person 2, etc.), as this helps to provide a quick check against the total number of residents.

Including yourself, can I have the first name of all persons who usually live here on (census day)?

Copy the first name of the persons on the form, and then have the respondent answer the following questions for each person.

2. Sex

Sex-specific information is essential in any population analysis. It helps to indicate demographic changes in our society and, when used with other characteristics, is an important criterion in research and planning.

What is this person's sex?

Male

Female

Other

Refused

3. Age

Information on age is needed to help the community plan for its current and future needs. These needs include such things as schools, day care facilities, recreation facilities, housing requirements, and seniors' facilities.

The federal census asks for each person's date of birth and age.

What is this person's date of birth and age on census day?

Alternatively, municipalities may choose to add age categories.

In what age category does this person belong?

One suggestion is to code age categories based on Statistics Canada's life cycle groupings:

0-17

18-24

25-44

45-64

☐ *65+*

You may experience some reluctance or even refusals to answer age-related questions. Explain to the respondent the importance of collecting age data. You may also reaffirm the confidentiality of the data. If the respondent still refuses to answer this question, do not persist.

4. Other census questions

The municipality may opt to add other demographic or household questions to the survey. To ensure that the questions are valid and reliable, municipalities can refer to the 2016 federal census questions located here: <https://www12.statcan.gc.ca/nhs-enm/2016/ref/questionnaires/questions-eng.cfm>

Mail-out Census Questionnaires

With a mail out census questionnaire, the municipality would mail their paper survey, and have it returned in a self-addressed or business reply envelope. In-person distribution, fax-based returns, and other varied methods can be blended in with a mail questionnaire format. After the census questionnaires are returned, the data is inputted into a software collection program, either manually or usually by optical recognition software.

Advantages

The pros of mailing out census forms compared to other methods include:

- Convenience for the respondent as they have the opportunity to complete it when and where they want;
- Easier for respondents than a telephone or enumerator visit as they cannot leave and come back to complete;
- Cost effective as it would be less expensive than having enumerators visit every household.

Disadvantages

Cons for mail-out questionnaires are that:

- Mail-out questionnaires assume literacy. Not everyone may be able to fill out the questionnaire properly. Set up a census helpline or enumerator visits to improve response rates.
- Other census taking methods would need to be considered to include homeless individuals and people in institutional settings.
- Mail-out questionnaires can result in low response rates, and additional steps must be taken to improve response rates.

Steps for achieving a good response rate

Below are some suggested steps that may be taken to improve overall response rates on a mail-out census questionnaire.

Professional looking package

The initial package sent to respondents should be professional looking and contain the questionnaire, a cover letter, and a self-addressed return envelope or clear return instructions.

The cover letter should explain the purpose of the census, and that confidentiality is assured. This letter should be short and should provide a contact name and number. In general, it should be written by a senior officer of the municipality such as the Chief Administrative Officer.

The design of the questionnaire is critical. Careful use of graphics and overall design is more likely to encourage people to respond. The questions should be well-phrased and easy to understand.

Follow-up

Follow-up is essential to improve response rates. The second contact with respondents may occur a week or two later, and may consist of a reminder post card or follow-up letter. The third follow-up can include a letter and a replacement census questionnaire.

Other Factors to Consider

Other steps to improve response rates include:

- Avoid mailing census questionnaires near holidays as people may be preoccupied with vacations.
- Mail material early in the week. Mail that arrives on Fridays or Mondays tend to get set aside.

Conducting a Census in a Federal Census Year

Every five years, Statistics Canada conducts a national census. The next federal census will take place in 2021. It is in the best interest of Alberta municipalities to support the federal census since the accuracy of the federal census impacts federal transfer payments to the province, and affects the demographic information that forms the basis of policy and planning for all levels of government. Alberta Municipal Affairs encourages all municipalities to support Statistics Canada with the census enumeration process.

One of the challenges faced by Statistics Canada is when municipalities conduct a census on a federal census year. To address this issue, municipalities are encouraged to work with Statistics Canada to ensure the success of both censuses.

Census Timeframe

For the past federal census, Statistics Canada chose the second Tuesday in May as the census day. Starting at the beginning of May, Statistics Canada sends out invitation letters to encourage households to complete census questionnaires, preferably by internet.

While many households will complete the questionnaire online, enumerator visits and telephone follow-up will still be required to increase the response to the census. In 2016, enumerator visits started on May 20 and finished on July 29.

To minimize the overlap between the federal and municipal census, municipalities can alter their census enumeration period to either March 1 to May 31, or May 1 to July 31 of the census year. Municipalities are not required to submit a request for approval to the Minister if they choose to conduct a census during the two optional time periods. Municipalities can still choose to conduct their census enumeration from April 1 to June 30 of the census year.

Not all municipalities will conduct a census during a federal census year. However, among municipalities that conducted a census in 2016, Statistics Canada indicated that residents were unaware that a federal and municipal census was occurring during the same time. To minimize confusion by residents between the two censuses, it is suggested that municipalities work with Statistics Canada and include marketing information on both censuses during a federal census year.

Recruitment of Census Workers

In the past few censuses, Statistics Canada has experienced hiring difficulties in Alberta municipalities with tight labor markets due to Alberta's high economic growth and wages. For Statistics Canada, enumerators are hired by a network of local field offices according to

standards and wage levels set by federal legislation. However, in 2016, some Alberta municipalities in high growth areas offered wages to census workers that were more than two times higher than Statistics Canada.

To assist Statistics Canada in the federal census, municipalities may direct their enumerators and residents to apply for census positions at the Statistics Canada website. These enumerators should be informed that they would still be required to undertake recruitment testing and training with Statistics Canada.

Address Register

The goal of a census is to count everyone once and in the right place. To ensure an accurate census count, both Statistics Canada and a municipality must have access to a complete list of residential addresses.

Statistics Canada has a complex and involved process to develop its address register from the previous census and administrative records; however, administrative records usually contain the mailing address of residents. This poses challenges for Statistics Canada, as Canada Post requires many rural residents to use post office boxes in adjacent municipalities as their mailing address.

Compared to Statistics Canada, municipalities have a more complete inventory of residential addresses. Municipal records (assessment, planning and development permits, water and sewer services; and other administrative records) offer a more complete enumeration of all structures and typically will identify all residences in the municipality. In high growth communities, new housing developments have occurred due to strong economic activity in the region that may not be on Statistics Canada's inventory of residential addresses. In addition, some municipalities that conduct an annual census may have information on suites available in homes that may not be readily available to Statistics Canada.

To ensure accurate federal census counts, municipalities are encouraged to share their address register with Statistics Canada. They may also direct Statistics Canada to locations where transient populations may reside. A complete address list is vital to ensure a complete and accurate population count.

Hard to Count Individuals

All levels of government must work together to ensure that all groups are counted during a census. Undercounting may deprive a community of government funding for vital services and programs.

Certain groups that are often missed in a census include young adult males in work camps, those who are First Nations (on- and off-reserves), immigrants, individuals in collective dwellings and the homeless. Municipalities may be aware of the best way to enumerate these populations and

may be able to assist Statistics Canada to ensure all residents are enumerated. They are also in the best position to suggest possible contacts with social agencies to locate some hard to reach groups.

ENUMERATOR TRAINING

The following sections of the manual pertain to the roles and responsibilities of the enumerator. Census coordinators may choose to use this material as part of their enumerator training manual.

Role of the Census Enumerator

A successful census cannot be conducted without conscientious and well-prepared enumerators obtaining accurate and complete information. The specific roles and responsibilities of the enumerators will vary depending on the type of census methodology used.

Statement of Census Enumerator

Enumerators are required to sign a statement. This statement says that you will follow all procedures and regulations related to your duties. This includes conducting the census according to the procedures outlined in this manual, and ensuring that personal information is protected as specified in the *FOIP Act* (see Appendix A, Statement of Census Enumerator). The Statement of Census Enumerator is **valid for the person's lifetime**.

Your Responsibilities

As an enumerator, you will work under a census coordinator who will assign you one or more enumeration areas. You will be responsible for collecting the required information on all usual residents of that area.

Responsibilities may include:

- becoming familiar with your enumeration area(s);
- knowing how to systematically enumerate your area;
- knowing who is eligible to be counted;
- knowing what to do in cases of non-response or refusal to respond;
- knowing how to complete the census form accurately;
- creating and/or using a system to track completed properties;
- understanding and following confidentiality and security guidelines and procedures;
- accommodating a flexible work schedule, including days, evenings and weekends;
- meeting quality and productivity standards set out by the census coordinator;
- completing your enumeration area within the time prescribed by the coordinator.

Confidentiality

All information obtained during the census must be kept confidential. Your letter of introduction should be readily available to show to the respondent. This letter identifies you as an official enumerator and assures the confidentiality of all information collected (a sample letter is included in Appendix B, Letter of Introduction). Municipal issued photo identification identifying you as an enumerator may also help ease respondents' confidentiality concerns. If the municipality provides this identification, you should ensure it is easily visible to respondents. This photo identification must not be used for any other purpose and must be returned to the municipality upon request, or upon completion or termination of your role as enumerator. A lost or stolen identification card should be reported to your census coordinator immediately.

Do not leave completed census forms where other individuals may see them. Refer any requests for information that you cannot answer to your census coordinator.

Your Approach

It is imperative that you be courteous, tactful, confident, and appropriately dressed during the enumeration. A friendly approach and a tactful presentation of questions will help achieve a successful interview. Should the respondent become uncooperative or unpleasant, politely leave and refer the case to your census coordinator.

Your Routine

During the census period, enumerating is a labour-intensive job that requires careful time management. Your work hours may have to be adjusted to the times that people are most likely to be home. This may mean your visit occurs in the evening. Enumerators can respectfully acknowledge any inconvenience, while also reminding the respondents of the importance of the census and the estimated time to complete the interview.

Enumeration hours will be set by the municipality, but are often between 10:00 am and 9:00 pm.

Assistance From Your Census Coordinator

Always remember that your census coordinator is there to assist you should problems arise during enumeration. In the early stages of enumeration, some coordinators find it very beneficial to review a small sample (5 to 10) of your first batch of completed census forms. This helps to identify and clarify any problems before the census gets too far underway.

The procedures taken and the work pattern established will be determined by each coordinator. The primary role of the coordinator is to guide the enumerator in census procedures. Never hesitate to ask for assistance. If possible, enumerators should carry a cell phone while they work in case of emergencies or questions for the census coordinator.

The Enumerator's Materials

At an instructional meeting held prior to the census, you will be supplied with a package of materials for enumerating. If you find that any item is missing, contact your census coordinator. Below is an example of some materials that may be provided to census enumerators:

- an official letter of introduction (see Appendix B for an example);
- an identification badge;
- the Municipal Census Manual (this manual);
- an enumeration area census map;
- census forms and clipboard (see Appendix F for an example), OR;
- electronic device (such as a wireless device or laptop);
- a cover sheet for identifying information to be returned with the completed census forms;
- forms for recording call-backs (see Appendix B for an example);
- enumerator Notice of Visit Cards (see Appendix B for an example);
- pencils and paper clips;
- large envelope(s) to temporarily store completed census forms.

The Enumeration Area Census Map

The enumeration area (EA) census map is one of your essential tools for conducting the census. An EA is a smaller area within the municipality that is established to collect and analyze information. The EA census map should depict all of these areas. Study your map carefully to become thoroughly familiar with your EA. Depending on your municipality's approach to mapping, your map may include outlined and numbered area identifiers (such as lot, block, and EA numbers), census zones, or possibly residential addresses. For rural areas, the quarter section, section, township, range, west of meridian, and EA numbers are generally shown on the map.

Other identifiers or landmarks may also be shown to assist in finding specific locations. Sample maps for urban enumeration (Figure 1) and rural enumeration (Figure 2) are on page 51. It is essential that no part of your area, and no person living there, is overlooked.

Always inquire whether there are adjacent dwellings. A dwelling is defined as a separate set of living quarters with a private entrance from the outside, or from a common hallway, parking garage, or stairway inside the building. This entrance should not be through someone else's living quarters.

Do not overlook the possibility of caretakers' quarters in commercial buildings, and other structures that are non-residential. In addition, there may be motels, tourist camps, trailer camps, or types of institutions such as nursing homes, jails and so on, that must be included if they house usual residents (see page 63 for information on enumerating "collective dwellings").

In summary, study your area map with care and investigate all places within your area where people live or might be living.

Method of Covering Your Area

Enumerators should go through their entire route before focusing primarily on call-backs.

Block Enumeration

In enumerating a block, it is most important that a consistent direction is maintained. Be careful not to miss houses situated back from the street or in lanes. The order or specific direction might be set up by the census coordinator.

Figure 1: Urban Enumeration Area Map Example



The following instructions may be used as guidelines for covering urban and rural areas. Your municipality may also have best practice guidelines.

- (i) **Urban Coverage:** Cover your area on a block-by-block basis in a systematic fashion. For example, start in the north-east corner of a block, enumerate that block in a clockwise direction, then carry on to the next block and continue enumeration using this method. This will prevent you from going back and forth across the street and losing track of the dwellings you have enumerated and those not enumerated. Not all blocks are laid out the same way so this example may not apply in every case.

Of primary importance is selecting the most efficient system for your particular area ensuring that no dwellings are left out or enumerated twice. After you enumerate each dwelling, place an “X” on the lot of your map. This will help you to know where you have enumerated, and assist you in locating your call-backs. An “X” should also be placed on lots with no dwelling units.

Figure 2: Township Showing Section Numbering Sequence

- (ii) **Rural Coverage:** Cover your area in a systematic fashion, quarter section by quarter section. There are 36 sections in a township. Beginning with the lowest numbered section in a township, take one quarter of this section at a time. If the quarter section is comprised of a farmstead, mark the appropriate location of the principal dwelling on your map using the number (1). If there are other farmstead dwellings where people live (such as cottages or trailers) mark their location in the quarter section using successive numbers (2), (3), etc.

31	32	33	34	35	36
30	29	28	27	26	25
19	20	21	22	23	24
18	17	16	15	14	13
7	8	9	10	11	12
6	5	4	3	2	<div> <div>NW</div> <div>NE</div> <div>1</div> <div>SW</div> <div>SE</div> </div>

If the quarter section is subdivided, use a similar method to locate each dwelling systematically. For example, mark the first dwelling you encounter as number (1) on your map and then number the remaining dwellings in the quarter section successively in the order in which they appear. When you start in the next quarter section, begin your numbering system over again with dwelling number (1).

It is also advisable to mark any other landmarks on your map that can serve as identifiers. This will prevent you from losing track of the dwellings you have not enumerated and assist you in finding Non-Response Follow-Up locations.

Note that rural coverage can be modified depending on the population density of the area, such as large residential subdivisions and hamlets.

In these cases, it may be more appropriate to cover the area on a block-by-block basis as described under urban coverage.

Completing the Census Form (Paper-Based Census)

Be Accurate

Read the instructions carefully to make sure that you are asking questions as instructed and obtaining the required information. Do not guess at any information; record only what you are given.

Print Clearly

With paper-based forms, someone else may have to interpret the information that you have gathered, so it is vital that the forms are legible. This is not an issue with electronic forms.

Code Carefully

If your municipality uses codes, be sure to select and enter the code numbers of response categories with care to eliminate confusion and error, and place only one digit in each box. Coding should be right justified — that is, adjust the position of the numbers so that the numbers are entered in boxes on the right hand side and any blank box is filled with a zero. For example, 8 would be entered: 008; 38 would be entered: 038; and 138 would be entered: 138.

Check Blank Spaces

You may leave a blank space only when you are not able to obtain information from the respondent. In all other cases, all spaces should be filled. If data entry operators are used, they will be entering this information only as they see it on the forms. Thus, it is very important that you fill in all information. After completing the interview, recheck the form to make sure that you have not left blank spaces or boxes by mistake.

Do Not Destroy Paper Forms

Every census form must be accounted for. If you make errors on a paper-based form and must begin again, write VOID across the form and return it to your coordinator. If the number on the paper-form was pre-printed, or if there is a tracking system in place, make sure the new form can be linked to the dwelling. With an electronic form, if you make an error during the interview, simply delete the error and enter in the correct information.

Return All Paper Census Forms

Return completed census forms to your coordinator as requested when you have completed your enumeration.

Conducting Interviews at the Door

Once you are familiar with your map, your area, and how to cover your area efficiently and completely, you are ready to approach the dwellings and their household members. In preparation for this step, the following procedures may be of assistance.

Where to Interview

Generally, it will accelerate the enumeration process if the interview is conducted at the door of the home.

You may turn down an invitation to enter the dwelling by saying that all you need are a few questions answered concerning the household members. Check with your census coordinator or municipality regarding policies on entering dwellings during the interview process. Your safety is of utmost importance in these situations. Do not enter a dwelling if you feel unsafe.

Additional safety tips:

- Have your cell phone programmed with phone numbers for your coordinator and other enumerators in or near your enumeration area.
- Check in regularly with the census coordinator.
- For areas where safety might be a concern, work in pairs with other enumerators.

Who to Interview

The person you interview must be a responsible adult (18 years of age or older) who is a member of the residence and who can answer the questions accurately. If a child answers the door, ask to speak to a responsible adult. If no one else is available, ask when an adult will be home. Also, avoid interviewing before a group other than the family unit. Point out that replies to census questions are confidential and that you would like to speak to the person alone.

Identification

If your municipality supplies you with an identification card, ensure you are wearing this prior to your arrival. This will aid in establishing yourself as an official census enumerator.

Letter of Introduction

This letter identifies you as an official census enumerator, explains the purpose of the census and importance of complete coverage, and assures confidentiality of individual responses. The letter should be available for the respondent to read, if requested.

The Interview

When an adult is available, introduce yourself, and then begin the interview. It is advised that an introductory statement be practiced so that you can say it automatically and smoothly. This will greatly boost your interviewing confidence as well as the cooperation of the person you are interviewing.

Pay attention to your conduct during the interview

- Project confidence and professionalism with your appearance, tone of voice and body language.
- Ask questions in a positive manner.
- Handle all questions with sensitivity.
- Maintain a moderate pace and keep the interview as brief as possible.
- Vary the tone of your voice to avoid sounding monotonous.

Completing the Questionnaire

- Read the questions exactly as worded. If you change the wording of the question, you change the meaning.
- Do not skip questions unless they do not apply.
- Read all questions in the order they were written, even if the respondent happened to answer them previously.
- Repeat and clarify questions that are misunderstood. If the respondent gives you a partial or an incomplete answer even after you have probed, write down the answer.
- Check the questionnaire for completeness and try to obtain any missing information before you leave the dwelling.

Reacting to situations that may arise during an interview

During enumeration you may encounter various situations to which you will have to react. Tips for dealing with situations that might arise are as follows:

Refusal to Give Information

Interview refusals may occur because a municipal census is voluntary and lacks the force of law, unlike the federal census conducted by Statistics Canada. The following tips can be used at the door to encourage residents to participate in the census:

- Show the person your letter of introduction, which identifies you as a census enumerator, shows the importance of complete coverage, and assures confidentiality of individual responses. Remind them that complete coverage is needed so the municipal government can better plan community services, and gain its full share of population-based provincial funding for community improvement projects (e.g., transportation projects, recreation facilities, parks).
- Inform the respondent that the interview will not take long. If inconvenient timing appears to be the problem, ask if there is a better time to do the interview or if they would like to arrange a Non-Response Follow-Up. Use the Notice of Visit Card to record the respondent's name and preferred Non-Response Follow-Up date and time.
- Ask the person if they would be more comfortable reporting their information directly to the census coordinator. If so, provide the census coordinator's contact information and the deadline for the census. The coordinator must confirm that the person calling is the proper census respondent, and that the response has not already been collected. After the interview, the coordinator should inform you that the response has been collected to avoid duplication.
- If the census questionnaire is available online, inform the occupant about their option to complete the census online. Completing the online census is fast, easy and confidential. For residents who do not have home internet access, inform them of local facilities that offer secure public access to the internet (e.g., libraries). Inform the resident that an enumerator will return after a certain time if no internet response has been registered.
- If all else fails, try to at least obtain a population count of the household by asking how many people reside at the home.

- If there is no one home (i.e., if there is no contact made), you can ask neighbours if people live in the residence. You may not ask a neighbour other census questions about the residents such as age, sex, and income.
- Note that if you make contact with the respondent and they refuse to give information, do not ask neighbours for information on that dwelling. Only ask neighbours for information if there has been no contact.

If the person continues to refuse, politely leave the residence. Note the refusal at the top of the census form, list the dwelling on the Non-Response Follow-Up form, and report the situation to your census coordinator.

The coordinator should attempt to convert the refusal into a response by contacting the dwelling and persuading them to participate. Sometimes, respondents are more comfortable sharing information with the coordinator compared to an enumerator. If a completed questionnaire is obtained (by follow-up or online), the original census form is voided. The coordinator is responsible for the collection of all filled, void, and unused forms.

In the event the municipality is unable to convert the refusal to a completed interview, the municipality can ask a neighbour for the number of people residing in the household.

Respondent is unable to complete the questionnaire at the time of the visit

You can present the respondent with the following options:

- Ask if there is another adult in the household that would be available to complete the interview.
- Offer to come back at the respondent's convenience.
- Obtain a contact number and offer to follow up by telephone to complete the questionnaire at the respondent's convenience.

Respondent claims that the questionnaire was already completed

In these situations, let the person know that the questionnaire information was not received. Ask to complete a new questionnaire with them for their household.

- If the respondent agrees, proceed to complete the questionnaire.

- If the respondent does not wish to complete the questionnaire, make notes that the respondent claims that the questionnaire was completed and refused to be interviewed.

Language Difficulties

If you encounter language difficulties with a usual resident, check to see if another adult member of the household (who is also a usual resident) can provide the needed information. Alternatively, it may be possible for another individual to act as an interpreter. In such a case, the respondent would need to grant permission to conduct the interview using the interpreter. The interpreter can be anyone, as long as the respondent approves of them doing the interview. Typical interpreters include neighbours, children under the age of 18, visiting family members, etc.

If these options do not present themselves, another possible solution would be to return in the evening when others may be at home.

If you cannot make yourself understood, try to determine the language spoken and list the house for a call-back. Consider consulting with your coordinator, who may be familiar with, or have access to additional information about, the ethnicity of the household or enumeration area. In some cases, the coordinator may provide you with a booklet with all census questions translated into a variety of languages. Alternatively, it may be possible to have your coordinator arrange for an interpreter to accompany you on your return visit. The respondent should be informed that the interpreter accompanying you has been hired by the census coordinator and, like you, has also subscribed to a statement to ensure the confidentiality of census information.

Respondent informs you they are not the usual resident at this address on census day.

In this situation, first ask them if the dwelling was occupied or unoccupied on census day.

- If the dwelling was occupied but the previous householders had moved, ask the current householder if they know how many people were in the previous household, and if they have contact information with the previous householders.
- If the dwelling was unoccupied on census day, enter the information on the census form.
- If the respondent tells you that the usual residents of this household will be away until after the enumeration date (e.g., on vacation, business trip), ask the person how many usual residents live there and record the number.

Respondent wishes to be interviewed separately from the rest of the household

Occasionally, a person who is a usual resident at the address on census day may want to be enumerated separately for privacy or other reasons. You can interview the person in private. If they agree, record their answers in the same questionnaire.

You discover a new or missed dwelling during the interview

Occasionally, you may find a new dwelling that may need to be added to your address list. For example, a basement of a house has been converted into a separate basement suite that has its own entrance, and otherwise meets the definition of a private dwelling.

Use a new questionnaire to enter the address and dwelling information, and interview the residents.

You feel harassed.

Do not challenge the respondent, and withdraw immediately. Note the circumstances on the survey form, report the situation immediately to your supervisor.

No one answers and the dwelling appears unoccupied

If a dwelling appears to be unoccupied, be careful as it could have been occupied on census day. To obtain this information, speak to neighbours to determine if the dwelling was occupied and how many residents lived there on census day. Apply a note to the form that the information was obtained from neighbours.

If you determine that the dwelling was unoccupied, add a note on the form and obtain the name and phone number of the person who confirmed that the dwelling was unoccupied.

If you cannot determine the occupancy status of the dwelling, indicate that further follow-up is required.

There is no private dwelling at the address

This may happen when a dwelling has been demolished, destroyed or merged with another residence. This can also happen when the address corresponds to a different type of establishment such as a business or store. In this situation, record the information on the census form.

Telephone Interviews

Enumerators can contact a dwelling by telephone or in-person to complete the questionnaires. In general, it is a good idea to vary the way you contact the household to maximize your chances of reaching them.

In order for enumerators to contact residents, the municipality must have a database of telephone numbers by residential address. Municipalities should check with their FOIP Coordinator to ensure they are able to use other municipal databases to conduct their municipal census.

A municipality may also choose to provide residents with a telephone number to contact the municipality to complete the census.

Telephone interviews must be conducted on a landline or a cell phone in a secure and private room. During telephone interviews, you will have to verify the address for the number you call since you are not able to see the dwelling itself.

Reacting to situations that may arise during the interview

Many situations you will encounter by phone are similar to those for in-person interviews. For example:

- Dealing with reluctant respondents;
- Reassuring respondents about the confidentiality of information;
- Answering any questions related to the use of census data and its importance.

The following tips can be used to encourage residents to participate in the census.

Respondents have privacy concerns about using their cell phone.

If a respondent answers your call and expresses privacy concerns about data being transmitted over the cell phone or being overheard:

- Ask for a landline number, if one is available. If yes, call back at this number.
- If no, inform the respondent you will visit them to complete the questionnaire.

The number you dial is invalid and does not correspond to the address.

Occasionally, the number you dial could no longer be in service, may be that of a business, or may not correspond to the address.

- Assign code or note for incorrect phone number.
- Follow up with a field visit to the address.

Refusal to complete the survey over the telephone

Attempt to follow up with a field visit on the same day or no longer than 24 hours after the initial contact

- Note the appointment time on your assigned list.
- Enter refusal on the address list.
- Follow up with a field visit to complete the questionnaire in-person.

Someone hangs up

- Add code or note that this requires further follow-up and that someone hung up.
- Follow up with a field visit to complete the questionnaire in person.

No one answers the phone

- Do not leave a message on an answering machine, or voicemail.
- Add a note that there was no answer on phone and that this requires further follow-up.
- Follow up with a field visit to the address.

Enumerating Collective Dwellings

Collective dwellings are communal, commercial, or institutional buildings where multiple people live. To be a usual resident of a collective dwelling, a person must reside in the collective dwelling for six or more months on census day, or live there permanently as they have no other usual home.

In all cases, persons residing in collective dwellings must also fit the definition of usual resident to be enumerated. For a complete definition of usual resident please refer to page 14 under definitions.

Types of Collective Dwellings

There are 10 types of collective dwellings:

- Hospitals;
- Nursing home and/or residence for senior citizens;
- Residential care facility, such as a group home for persons with disabilities or addictions;
- Shelter;
- Correctional or custodial facility;
- Lodging or rooming house;
- Religious establishment such as a convent, monastery, or seminary;
- Hutterite colony;
- Establishment with temporary accommodation services such as a hotel, campground, YMCA, Ronald McDonald House or hostel;
- Other establishment such as a school residence, military base, or work camp.

Usual Residents of Collective Dwellings

Persons residing in collective dwellings must also fit the definition of usual resident to be enumerated. For a complete definition of usual resident, please refer to page 14 under definitions.

The census includes usual persons living in the municipality on census day. Use the information in the following table to decide in which dwelling a person should be enumerated.

Table 4: Where to enumerate usual residents of a collective dwelling

Usual Resident	Where to Enumerate
Was admitted less than six months prior to census day and has a usual residence elsewhere.	At his/her usual residence.
Was admitted six or more months prior to census day.	At the collective dwelling.
Was admitted at any time AND has no usual residence.	At the collective dwelling.

Pre-contact with collective dwellings

To help enumerators, the municipality may choose to call and/or send out a pre-contact letter to each collective dwelling (Appendix D).

Prior to an enumerator visit, the census coordinator or enumerator should:

- Establish contact with an administrator of the collective dwelling;
- Confirm they reached the correct collective dwelling and the address;
- Inform the administrator of the upcoming census enumeration;
- Gather information about the collective dwelling contact who will be providing the required information;
- Determine if administrative records or computer printouts are available. Information you will require are the admission date, and whether each usual resident or employee (including family members) residing in the collective dwelling has a main residence in the municipality. This information is required for usual residents only:

- If administrative records are to be provided, request time for an enumerator to pick up a computer printout;
- Take notes of any relevant information (i.e., optimal times for enumerator visits, preferred language of communication, how to obtain access to the building, etc.); and schedule a time and date for the enumerator to meet with the designated census contact if possible.

Enumerator Visit

During the visit at the collective dwelling, the enumerator should:

- Ensure the name and addresses of the dwelling in the address portion of the census form are correct, and record the dwelling type. In the case of institutions (e.g., hospitals, nursing homes, prisons) include all patients or inmates who have been full-time residents for six months or more and meet the other qualifications of a usual resident.
- Ask the designated census contact of the collective dwelling the date of admission, type of resident (employee, employee's family, patient) and whether the resident has a usual residence elsewhere in Canada.
- Also ask about the number of unoccupied units as of the census date. Be careful in asking this question; if a dwelling is being rented, the landlord will consider it "occupied," even if there are no usual residents living there. For the purposes of the census, an unoccupied unit is one with no usual residents.
- Record the information on the units and use it later to track which units have been enumerated.
- Create a profile of the dwelling that contains its name, address, capacity, and contact information. Statistics Canada uses a similar approach to improve categorization of collective dwellings.
- Allow enough time to cover all of the occupied units within the building.
- Wear your identification upon arrival.
- If contact cannot be made with the census contact for the collective dwelling before enumeration, bring a cell phone and attempt to contact them before arriving at the building.

Before leaving the premises, and if administrative records are obtained, the enumerator must check to make sure the administrative records are complete. For usual residents, verify that all mandatory data requirements are completed.

- After the administrative records checks have been completed, the enumerator must follow up on each outstanding data requirement, and mark it for follow-up. This can be done by speaking to the collective dwelling census contact, a knowledgeable staff member, or the resident (if granted permission to do so).
- The enumerator is required to complete the Collective Dwelling Record (Appendix D), and attach the administrative records to the form. The supervisor is required to check the information for completeness and accuracy.

Census Coordinator Quality Checks

Quality checks are an important part of supervising enumerators and ensuring high quality results for the census. The enumerator must make arrangements to have their completed work sent to you on a regular basis. You may arrange for enumerators to deliver completed census forms to your office or you may arrange to pick up completed forms. Tasks that may be undertaken by a supervisor include:

- Identifying enumerator mistakes early and quickly by checking the Collective Dwelling Records daily. All collective dwelling information submitted by enumerators should be checked daily for completeness and accuracy.
- Conducting field visits with your enumerators. Observe your enumerators performing the interviews.
- Ensuring that enumerators complete their work quickly and efficiently. Check the progress made in relation to both the time available and the progress of other enumerators.
- Monitoring the hours worked by enumerators daily to ensure sufficient hours are worked each day at the appropriate time of day.
- Discussing performance issues with enumerators as quickly as possible. Low productivity and poor quality work slows the progress of enumeration and cause additional work for others.

Appendices

Appendix A: Oath and Statement

Oath of a Census Coordinator

MUNICIPAL AUTHORITY: _____, PROVINCE OF ALBERTA

MUNICIPAL CENSUS DATE: _____

I, (name of person taking oath), of (residential address), appointed census coordinator for (name of municipality), solemnly swear (affirm)

THAT I will act diligently, faithfully and to the best of my ability in my capacity as census coordinator;

THAT I will not, without authority, disclose or make known any information that comes to my knowledge by reason of my activities as a census coordinator; and

THAT I will supervise the municipal census and all census enumerators to the best of my ability and in accordance with the Municipal Census Manual approved by the Minister and published by the department.

SWORN (AFFIRMED) BEFORE ME at the _____)
 _____ of _____, in the Province)
 of Alberta, this _____ day of)
 _____, 20_____.)
 _____)
 _____)
 (signature of Commissioner for Oaths)) (signature of person taking oath)

IT IS AN OFFENCE TO SIGN A FALSE AFFIDAVIT

The collection of personal information on this form is authorized under Section 33(c) of the *Freedom of Information and Protection of Privacy (FOIP) Act* and will be used for the purpose of conducting a municipal census. All personal information will be managed in accordance with the privacy provisions of the *FOIP Act*. If you have any questions about the collection, contact (title and business phone number of the responsible municipal official).

Statement of a Census Enumerator

MUNICIPAL AUTHORITY: _____, PROVINCE OF ALBERTA

MUNICIPAL CENSUS DATE: _____

I, (name of person taking statement), of (residential address), appointed census enumerator for (name of municipality), solemnly state

THAT I will act diligently, faithfully and to the best of my ability in my capacity as census enumerator;

THAT I will not, without authority, disclose or make known any information that comes to my knowledge by reason of my activities as a census enumerator; and

THAT I will carry out the census of the area to which I have been assigned to the best of my ability and in accordance with the Municipal Census Manual approved by the Minister and published by the department.

(date) (signature of census enumerator)

The collection of personal information on this form is authorized under Section 33(c) of the *Freedom of Information and Protection of Privacy (FOIP) Act* and will be used for the purpose of conducting a municipal census. All personal information will be managed in accordance with the privacy provisions of the *FOIP Act*. If you have any questions about the collection, contact (title and business phone number of the responsible municipal official).

Appendix B: Enumeration Materials

Summary of Enumeration Procedures

Before you begin:

- Sign the Statement of Census Enumerator. This statement is good for the person's lifetime.
- Become familiar with your enumeration area (EA) and plan your route.
- Know all of the questions you will be asking.
- Adhere to the privacy provisions in the *FOIP Act* and respect respondent confidentiality.
- For your personal safety, check with your census coordinator or municipality regarding policies on entering dwellings during the interview process. Your safety is of utmost importance.
- Know your census coordinator's phone number. Do not hesitate to contact the coordinator if you have any questions or concerns, or if there is an emergency.
- Review and be clear on how to complete the census form accurately.
- Review and be clear on how to track completed properties and dwellings requiring enumerator visits.
- Practice your introductory statement for visiting dwellings before you start so you can say it automatically and naturally, without having to read from a paper. This will boost your confidence and increase the cooperation of the person you are interviewing.
- Make sure you have all the necessary census materials. The materials provided will vary by municipality. Some important materials may include the following:
 - photo identification and letter of introduction;
 - paper census forms or wireless device;
 - enumeration area map (EA map);
 - Notice of Visit Cards (to leave at dwellings when there is no one home);
 - Call-back Tracking form (for recording dwellings requiring enumerator visits);
 - response category cards;

- a cover sheet for identifying information to be returned with the completed census forms;
- cell phone;
- pencils and paper clips;
- the Municipal Census Manual.

Strategies to consider:

- Take note of landmarks on your EA map to assist in finding specific locations.
- Use a systematic approach to enumeration. For urban areas, cover your area on a block-by-block basis. For rural areas, cover your area quarter section by quarter section. Adapt as needed to ensure efficient enumeration in urban and rural areas.
- Mark an “X” on your map after you enumerate each dwelling. Also mark an “X” on lots with no dwelling units.
- For collective dwellings, plan how you will gain access to the building. Contact the building supervisor and arrange a time to visit the building.
- Manage your time carefully. Go through your entire route before returning for a field visit. Call-backs should be kept to a minimum and may be done in person or over the phone.

During enumeration:

- Be courteous, tactful, and professionally-dressed.
- Prior to arrival, be sure your identification card (if available) is clearly visible. Be ready to show your letter of introduction if asked.
- Interview all usual residents within your enumeration area.
- Make sure the respondent is a responsible adult who is a member of the dwelling and is able to answer questions accurately.
- If the respondent becomes uncooperative or unpleasant, politely leave and refer the case to your coordinator.
- When filling out the census form, record responses carefully and accurately.
- Write “Void” on any paper census forms that contain errors. Return voided forms to your coordinator. Do not destroy paper forms.

- Do not overlook any part of your area or any person living there. Be vigilant and take note of dwellings that may not be marked on your EA map (new dwellings or adjacent dwellings that are not obvious, for example). A dwelling is defined as a separate set of living quarters with a private entrance from the outside, or from a common hallway, parking garage, or stairway inside the building. The entrance should not be through someone else's living quarters.
- Use the tips provided in the Municipal Census Manual if you encounter situations such as refusals to give information, language barriers, or if you are unsure about the different types of residents and dwellings in your enumeration area.

Discuss any questions and concerns you have about the enumeration process with your census coordinator.

Letter of Introduction

Re: Municipal Census

This letter introduces _____ (name of enumerator) _____ who is an official municipal census enumerator for the Municipality of _____ (name of Municipality) _____.

The purpose of the census is to:

1. Help plan for improvements to our community such as transportation needs, recreational facilities, and parks, and
2. (May add additional rationale here).

This municipal census is being conducted under the authority of the *Municipal Government Act*. The collection of personal information is authorized by Section 33(c) of the *Freedom of Information and Protection of Privacy (FOIP) Act*.

The enumerators involved in the census have subscribed to a statement. All information collected will be kept confidential and used only for the production of anonymous statistics.

Your cooperation in providing the requested information is important to the census and is greatly appreciated.

If you have any other questions about the collection of this information or about the census in general, please call the census office at _____ (telephone number of the census office).

Yours truly,

Chief Administrator Officer

Notice of Visit Card

Notice of Visit Card

This is to advise you that a municipal census enumerator visited your residence on
 (date of visit) .

I will return on (day) , (morning/afternoon/evening).

If another time will be more suitable or if you wish to complete your census interview by
phone, please call me at (XXX) XXX-XXX.

Please quote reference number XXXXXXXXXX.

Thank you for participating in the municipal census.

Example of Quality Assurance Check Script

Hello my name is (your name goes here), and I work for the (name of municipality). May I please speak to (name of person for quality assurance check)?

I am a supervisor for the municipal census. An enumerator had visited your home to obtain some basic census information. For the purpose of quality assurance, I am calling to confirm that we have the correct number of usual residents at this address. People are considered to be usual residents if they usually live at this address, and have no other usual place of residence.

How many people are considered, for census purposes, to be usual residents at this address?

Appendix C: Census Questionnaire Sample

Questionnaire No. Enumerator:

Municipality:

MUNICIPAL CENSUS QUESTIONNAIRE

Section 1 - Identification						
Address of Dwelling:	<input style="width: 95%;" type="text"/>					
Telephone Number:	<input style="width: 95%;" type="text"/>					
Section 2 - Questions						
1 Including yourself, how many persons usually live at this address on <census day>? <input style="width: 50px;" type="text"/>						
2 Did you leave anyone out because you were not sure the person should be included? <i>For example, a student, a child in joint custody, a person temporarily away, etc.)</i>						
<input type="radio"/> Yes (specify name and reason) <input type="radio"/> No						
Name <input style="width: 400px;" type="text"/>						
Reason <input style="width: 400px;" type="text"/>						
3 Including yourself, can I have the first name of all persons who live here on <census day>?						
In the space provided, write the first names of the persons and ask the following questions for						
	Person 1 (First Name)	Person 2 (First Name)	Person 3 (First Name)	Person 4 (First Name)	Person 5 (First Name)	Person 6 (First Name)
	<input style="width: 100px;" type="text"/>	<input style="width: 100px;" type="text"/>	<input style="width: 100px;" type="text"/>	<input style="width: 100px;" type="text"/>	<input style="width: 100px;" type="text"/>	<input style="width: 100px;" type="text"/>
4 What is this person's sex?	<input type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Other	<input type="radio"/> Male <input type="radio"/> Female <input checked="" type="radio"/> Other	<input type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Other	<input type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Other	<input type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Other	<input type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Other
5 What is this person's age?	<input type="radio"/> 0-17 <input type="radio"/> 18-24 <input type="radio"/> 25-44 <input type="radio"/> 45-64 <input type="radio"/> 65+	<input type="radio"/> 0-17 <input type="radio"/> 18-24 <input type="radio"/> 25-44 <input type="radio"/> 45-64 <input type="radio"/> 65+	<input type="radio"/> 0-17 <input type="radio"/> 18-24 <input type="radio"/> 25-44 <input type="radio"/> 45-64 <input type="radio"/> 65+	<input type="radio"/> 0-17 <input type="radio"/> 18-24 <input type="radio"/> 25-44 <input type="radio"/> 45-64 <input type="radio"/> 65+	<input type="radio"/> 0-17 <input type="radio"/> 18-24 <input type="radio"/> 25-44 <input type="radio"/> 45-64 <input type="radio"/> 65+	<input type="radio"/> 0-17 <input type="radio"/> 18-24 <input type="radio"/> 25-44 <input type="radio"/> 45-64 <input type="radio"/> 65+
Section 3 - Quality Assurance Checks						
Municipalities are required to conduct quality assurance to verify the accuracy of the information collected. This would involve a supervisor contacting a sample of residents that took part in the census. Would you be interested in participating?						
4 Can I please have your first name? <input style="width: 250px;" type="text"/>						
5 Would you prefer we contact you by telephone, text message or email?						
<input type="radio"/> Telephone <input style="width: 100px;" type="text"/>						
<input type="radio"/> Text Message <input style="width: 100px;" type="text"/>						
<input type="radio"/> Email <input style="width: 100px;" type="text"/>						

Appendix D: Collective Dwelling Enumeration Materials

Pre-Contact Introductory Letter

Dear Sir or Madam

The <name of municipality> will be conducting a municipal census on <census date>. All usual residents of this municipality should be counted in the census, including those living in facilities such as yours.

A census representative will be contacting your facility to request assistance in enumerating all persons who are residents, as well as employees and their family members living with them. To determine if these individuals are to be included in the census, we will need to confirm dates of admission and if residents have another address in Canada.

The <name of municipality> will collect this information with minimal inconvenience to your facility. Your assistance with the census is greatly appreciated.

There are two options for enumerating your facility. We can complete the census using administrative records, or we can complete the census using paper questionnaires.

Administrative records are electronic records that contain information about residents who live in this facility. If your facility keeps electronic records that contain the required information to answer the census questions, we request that you print out this information and provide it to the enumerator. An example of an electronic print-out is included in this information package.

If your facility does not keep administrative records, we will require your help to assist the enumerator in answering the census questions, using your knowledge or the knowledge of a staff member.

This municipal census is conducted under the authority of the *Municipal Government Act*. The collection of personal information is authorized by Section 33(c) of the *Freedom of Information and Protection of Privacy (FOIP) Act*.

Please ensure that this letter is given to the administrator of your facility or the person responsible for administrative records in order to help with the upcoming enumeration activities.

Thank you in advance for your help with the municipal census.

Chief Administrative Officer

Sample Script for Initial Contact with Collective Dwelling

Hello my name is _____, and I am calling with regard to the municipal census. The census provides a count of people in this municipality. The information is important to your community and is vital for planning its public services.

We need your help enumerating this facility. There are two options. We can complete the census using administration records, or with your assistance, we can complete the census using paper questionnaires.

1. Administrative records are electronic records that contain information about residents who live in this facility. If your facility keeps electronic records that contain the required information to answer the census questions, we request that you print out this information and provide it to the enumerator.
2. If your facility does not keep administrative records, we will require your help to assist the enumerator in answering the census questions.

The census collects information on everyone living in this municipality. Anyone living in this facility must be counted in the census. This includes residents and employees who live on-site and their family members living with them.

To determine type of resident, enumerators will need to confirm dates of admission and if residents have another address in this municipality. We require this information for every unit or room

All information will be kept strictly confidential, in accordance with the privacy provisions of the *Freedom of Information and Protection of Privacy (FOIP) Act*.

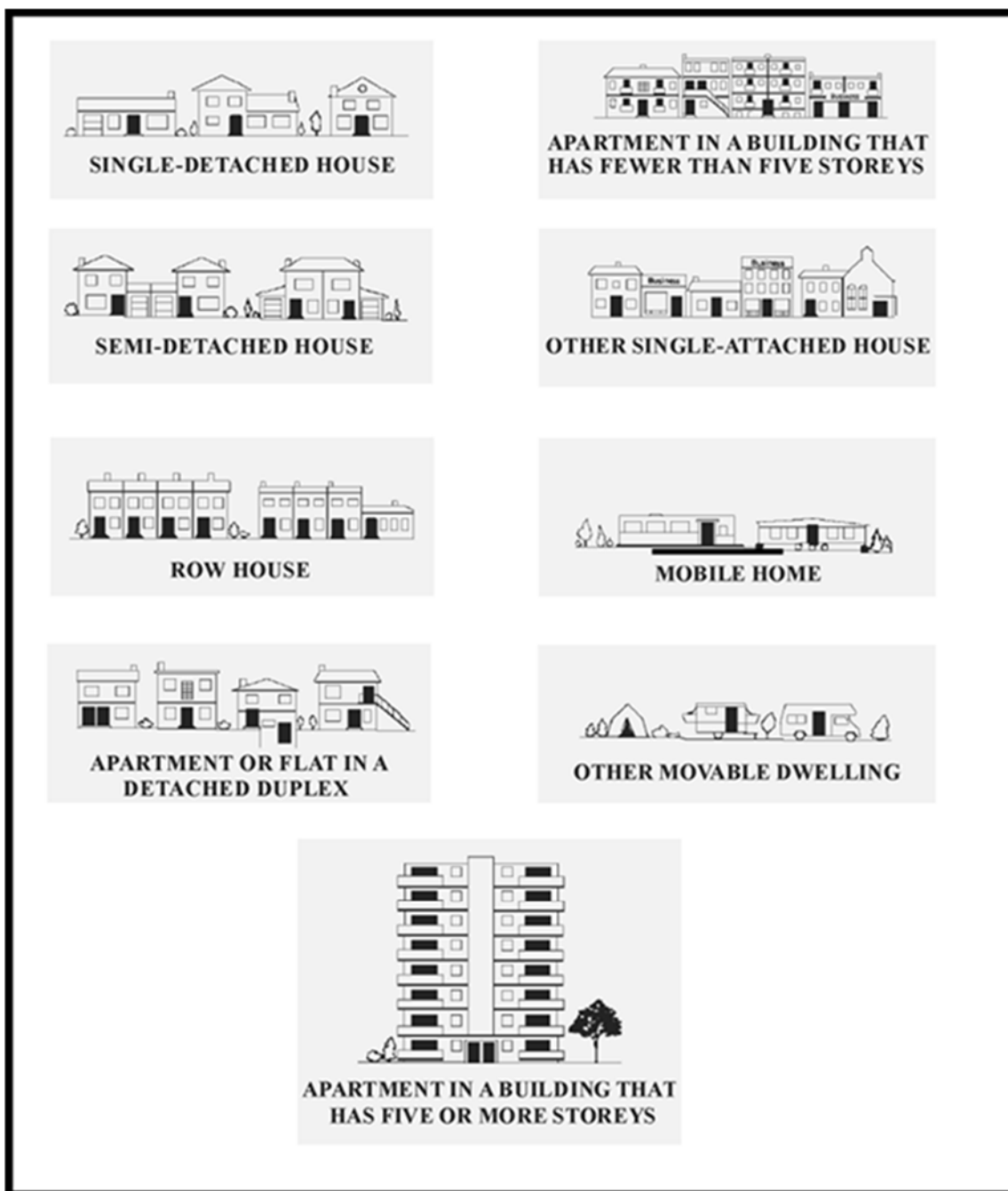
Thank you for your cooperation.

Example of Administrative Records or Form for Collective Dwellings

Room No.	Occupancy Status (yes if usual resident(s))	Date of Admission	Number of Usual residents	Has residence elsewhere in the municipality	Address in municipality	Status at Facility (resident or employee)
101	Yes	5/1/2016	1	No		Patient
102	No	4/1/2012	2	No		Employee
103	No	6/1/2015	1	Yes	9901 99 Street	Patient
104	No	3/1/2016	1	No		Patient

Note: This table contains fictitious information.

Appendix E: Private Dwelling Types



Appendix F: Forms to Submit to Municipal Affairs

Municipal Census Form



Alberta Government

Schedule 4
Municipal Census Form
Determination of Population Regulation
Alberta Regulation 63/2001

Municipal Authority _____, Province of Alberta.

Municipal Census Date _____

I, _____, of _____
 Name of Person taking Oath

_____, appointed designated officer for
 Municipal Office Address

_____, solemnly swear/affirm
 Name of Municipality

THAT I am the designated officer of the municipality of _____,
 Name of Municipality

THAT the date chosen as the municipal census date for the municipality was the _____ day of _____, 20_____.

THAT a municipal census enumeration completed on the _____ day of _____, 20_____ discloses that the total
 number of individuals whose usual residence is in this municipality is _____
 Total Usual Resident Population

THAT the Municipal Census Field Report attached below is accurate and complete to the best of my knowledge.

SWORN (AFFIRMED) before me

at the _____ of _____,
 in the Province of Alberta
 this _____ day of _____, 20_____

 Signature of Designated Officer

 Signature of Commissioner for Oaths

Municipal Census Field Report

Total count of usual residents	
Total count of private dwellings	
Total number of non-contacted dwellings	
Total number of refusals	

Private dwelling refers to a separate set of living quarters with a private entrance either from outside or from a common hall, lobby, vestibule or stairway inside the building. The entrance to the dwelling must be one that can be used without passing through the living quarters of someone else.
 Non-contacted dwelling is where a census worker has not been able to make contact with a member of the household and believes that the dwelling was occupied by usual residents on census day.
 Refusal is when a household refuses to participate in a census.

LGS0007 (2018/01) [Reset Form](#)

[Save Form](#) [Print Form](#)

AR 10/2013 Sched. 4; 198/2017

Shadow Population Verification Form

Errrrr bnnnn



Alberta Government

Schedule 3
Shadow Population Verification
Determination of Population Regulation
Alberta Regulation 63/2001

Municipal Authority _____, Province of Alberta.

Municipal Census Date _____

I, _____, of _____,
 Name of Person taking Oath

_____, appointed designated officer for
 Municipal Office Address

_____,
 Name of Municipality

solemnly swear (affirm)

THAT I am the designated officer of the municipality of _____,
 Name of Municipality

THAT the date chosen as the municipal census date for this municipality was the this _____ day of _____, 20____.

THAT a count of the shadow population completed on the this _____ day of _____, 20____.

discloses that the total number of temporary residents who are employed by an industrial or commercial establishment in the municipality for a minimum of 30 days within the municipal census year is _____.

Total Shadow Population

SWORN (AFFIRMED) before me

at the _____ of _____,

in the Province of Alberta

this _____ day of _____, 20____.

 Signature of Commissioner for Oaths

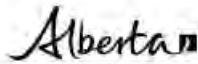
}

 Signature of Designated Officer

LGS0008 (2018/01) [Reset Form](#)

[Save Form](#) [Print Form](#) AR 10/2013 Sched. 3: 188/2017

Métis Settlements Members on Leave Verification Form



Métis Settlement Members on Leave Verification

Métis Settlement _____, Province of Alberta.

Municipal Census Date _____

I, _____, of _____
Name of Person taking Oath

_____, appointed designated officer for
Métis Settlement Office Address

_____, solemnly swear (affirm):
Name of Métis Settlement

THAT I am the designated officer of the Métis Settlement of _____

THAT the date chosen as the municipal census date for this Métis Settlement was the this _____ day of _____, 20____.

THAT a count of the members on a leave of absence who have executed written intent that was approved by the council to return to the settlement within five years of the municipal census date is _____
Total Count of Members on Leave

SWORN (AFFIRMED) BEFORE ME

at the _____ of _____
in the Province of Alberta,
this _____ day of _____, 20____.



Signature of Designated Officer

A Commissioner for Oaths in and for Alberta

Print Name

Expiry Date

LGS11848 Rev. 2018-10

[Reset Form](#)

[Save Form](#)

[Print Form](#)

Appendix G: FOIP Information for Conducting a Municipal Census



FOIP Tips for Planning a Municipal Census

As public bodies subject to the FOIP Act, municipalities must collect, use, disclose, protect, retain and dispose of personal information, including census information, in accordance with the Act. The following tips are offered for consideration in planning a municipal census.

Decide whether personal information is needed

- Only collect the personal information that relates directly to and is necessary for an operating program or activity of the municipality (section 33(c)).
- Review the Municipal Census form and decide which data elements are needed. Only collect the data elements necessary for a municipal program or activity.
- For example, if a new program for children is in the planning stages, you may need to collect dates of birth of residents if you need to know the distribution of children of various ages in the community. Or if the municipality is planning programs to support home businesses, you may need to collect employment location information.
- If the purpose of conducting the census is to collect the municipal grant from Alberta Municipal Affairs, collect a head count of residents per dwelling. Do not collect any personal information such as names, birth dates, gender, etcetera.

Collecting personal information

- Personal information should be collected directly from each household, not from neighbours or caretakers.
- Households should be advised how the information will be used, to meet the requirement of the FOIP Act to give notice (section 34(2)). The "Letter of Introduction" in Appendix B of the census manual (available from Alberta Finance and Enterprise) can be revised for this purpose. The notice should cover the use of the information, the authority for collection (section 33(c) of the FOIP Act) and who to call if the resident has questions.
- The notice can be given orally or in writing.
- Households should be advised that participation in the census is voluntary.

Using and disclosing personal information

- Use and disclose the personal information only for the purposes given by the enumerator at the time the information is collected; for a consistent purpose (one that has a reasonable and direct connection to the original purpose and is necessary for operating a legally authorized program of the municipality); or for a purpose authorized under section 39 of the FOIP Act.

Protecting personal information

- Protect census information by making reasonable security arrangements against such risks as unauthorized access, collection, use, disclosure or destruction.
- Protect identifiable personal information from the time it is collected until it is properly disposed.
- Reasonable security arrangements include requiring enumerators to take the Oath of Office; keeping all identifiable information collected in locked cabinets; restricting access through the use of passwords or user verification for electronic information; and shredding the information after its approved retention period.

Retaining and disposing of personal information

- Retain for the period of time specified in the municipality's approved retention and disposition schedule for the type of record. Dispose of the information at the end of this period. If identifiable information has been collected, documents should be destroyed in a secure manner.

Questions? Call the FOIP Help Desk at 780-427-5848 (toll free dial 310-0000 first), e-mail the foiphelpdesk@gov.ab.ca or visit our website at foip.alberta.ca.

September 2003, updated December 2006



Pam Hansen
Board Chair, Ward 4

Luci Henry
Vice Chair, Ward 1

Lorrie Jess
Ward 2

Trudy Bratland
Ward 3

Brent Buchanan
Ward 5

Kelly Lowry
Ward 5

Jayson Lovell
Superintendent of Schools

6000 Highway 2A
Ponoka, Alberta T4J 1P6

Phone: (403) 783-3473
Fax: (403) 783-3483

R. Poole 14/01/21

Wolf Creek Public Schools

January 11, 2021

RE: Wolf Creek Public Schools Budget and District Priorities Input Invitation to Municipal Councils

Dear Mayor/CAO,

Wolf Creek Public Schools' Board of Trustees is seeking your feedback through *ThoughtExchange*, an online tool used to consult with stakeholders most affected by our decisions, as the Board gets ready to prepare the school division's Three Year Education Plan and set its budget priorities.

Please ensure you have watched the 2021 WCPS *ThoughtExchange* Priority Engagement Video before participating in the *ThoughtExchange*.

View the video at the link [HERE](#).

Participate in the *ThoughtExchange* at the link [HERE](#). Please note, the exchange is open until February 12, 2021.

The video with Superintendent Jayson Lovell will give you an in depth overview of Wolf Creek's previous areas of focus and successes, about the Division budget, how school divisions, including Wolf Creek, are funded by Alberta Education, and where the money is spent.

Finally, Superintendent Lovell will go into detail about pressures the Division faces from a decline in enrollment due to COVID-19, how that has shaped class sizes in many schools and the budget pressures this decline in enrollment places on our funding.

Thank you for your time and attention and for your continued support and partnership with Wolf Creek Public Schools.

Sincerely,

Pam Hansen
Board Chair





PRLS BOARD TALK

Highlights of the Parkland Regional Library System Board Meeting

NOVEMBER 12, 2020

Organizational Meeting

Parkland's board has 8 new members. Board Members in attendance elected the new Executive Committee and Board Chair. Debra Smith was re-appointed Board Chair by acclamation.

Executive Committee

The Executive Committee has 3 new faces, along with returning members.

Debra Smith, Committee Chair (Village of Lougheed)

Bruce Gartside, (Village of Donalda)

Cindy Trautman, (Camrose County)

Heather Ryan, (Town of Olds)

Janine Stannard, (Town of Coronation)

Jas Payne, (Town of Sylvan Lake)

Jason Alderson, (Town of Rocky Mtn. House)

Kevin Ferguson, (Town of Ponoka)

Philip Massier, (Red Deer County)

Ray Olfert, (Town of Blackfalds)

2021 Budget Approval

As of the date of the board meeting, PRLS' 2021 budget was approved by 68.75% of the municipalities representing 71.84% of the population. A list detailing municipal approval has been sent to Parkland's board members and municipalities.

Advocacy Committee

There were no new volunteers for the Advocacy Committee. All the current members chose to remain on the committee for another year.

Gord Lawlor, Committee Chair – Town of Stettler

Barb Gilliat, Vice Chair – Village of Alix

Bill Rock – Village of Amisk

Cora Knutson – Town of Bentley

Deb Smith, Ex Officio – Village of Lougheed

Janine Stannard – Town of Coronation

Jeanny Fisher – Town of Daysland

Norma Penney – Village of Clive

Shannon Wilcox – Town of Carstairs

Stephen Levy – Town of Sedgewick

The newest advocacy tools from the committee include key messages, examples of supporting data, and sample elevator speeches. The committee has also settled on 3 regional key messages that they recommend board members adopt and use when talking about the library.

1. The library is a wise investment. We provide a very good financial return on investment.
2. The library supports the financial well-being of all citizens.
3. The library provides an important point of social connection that supports mental health.

The Advocacy Committee has also provided a dozen elevator speeches demonstrating how to deliver a key message with supporting facts in about 30 seconds. These examples will be posted on Parkland Library's Support Site.

New Building Update

Parkland took ownership of the new headquarters building on September 30th and rented the old headquarters for \$1 for the month of October from the new owners, the City of Lacombe, until the new building was ready for occupancy.

Moving occurred in a three-stage process over the month of October. The final move, which included the transfer of Parkland's network and staff operations, began on Friday, October 16th and were completed on Monday October 19th. By Tuesday the 20th, Parkland was in full operation.

The final hand-over of the old building to the City of Lacombe occurred on the afternoon of October 28th, thus ending the presence of Parkland Regional Library at the old address of 5404-56 Avenue in Lacombe. Staff are working to establish a date for the new Minister of Municipal Affairs to tour the new building.

Since Parkland cannot hold an open-house to celebrate the new headquarters due to restrictions resulting from the COVID-19 pandemic, staff are preparing a virtual tour that can be put on Parkland's website. The virtual tour will allow stakeholders to get a sense of the new building until an in-person event can be held at some point in the future.

Stronger Together Conference

The 2020 *Stronger Together* Virtual Conference was a tremendous success. This event was created in cooperation with Yellowhead Regional Library, The Peace Library System, and The Alberta Library (TAL). There were 1,155 registrants from across the globe with 730 live participants, as many as, or more than, the number of delegates normally attending the Alberta Library Conference. We are very pleased with the outcomes of this event and plan on a similar conference in 2021.

ALTA Board Alternate for Parkland

The Alberta Library Trustee Association (ALTA) represents the trustees from all ALTA member libraries in the province of Alberta.

Currently, the Parkland Region is represented by Bob Green from the Carstairs Municipal Library. At present they are looking for an Alternate Director from the region. The region includes the City of Red Deer. Bill Windsor from the Town of Didsbury volunteered to let his name stand to be an Alternate Director representing the Parkland Region on the ALTA Board. Parkland will submit his name to ALTA for consideration.

Board Meeting Dates for 2021

At present, Parkland is planning on holding board meetings virtually for 2021.

February 25 - Annual Report, Year in Review

May 20 - 2019 Financial Statements presented

September 16 - Budget presentation for 2021

November 18 - Organizational Meeting

2021 Alberta Library Conference

In the normal course of events, Parkland pays for three trustees, plus the Board Chair to attend the Alberta Library Conference. However, due to the COVID-19 pandemic, the conference has been cancelled for 2021.

Community News from Trustees

Stettler Public Library is holding a "Christmas Wine Survivor Raffle" virtual elimination draw at the beginning of December. Cost to join is \$20 per ticket plus a bottle of wine.

Board Members Present

Deb Smith, Gord Lawlor

Board Members Present via Zoom

Jason Alderson, Jackie Almborg, Lana Curle (Alternate for Rick Pankiw), Colleen Ebdon, Kevin Ferguson, Jeanny Fisher, Elaine Fossen, Dwayne Fulton, Bruce Gartside, Barb Gilliat, Jeanette Herle, Agnes Hoveland, Cora Knutson, Stephen Levy, Daryl Loughheed, Josephine McKenzie, Philip Massier, Ricci Matthews, Leah Nelson, Ray Olfert, Terilyn Paulgaard, Jas Payne, Norma Penney, Rosella Peterman, Bill Rock, Heather Ryan, Sharolyn Sanchez (Alternate for Mike Yargeau), Janine Stannard, Les Stulberg, Patricia Toone, Cindy Trautman, Doug Weir, Shannon Wilcox, Bill Windsor, Mary Ann Wold, Bonita Wood, Mike Yargeau, Ann Zacharias

With Regrets

Dana Kreil, Blair Morton

Absent

Alison Barker-Jevne, Doreen Blumhagen, Glen Carrit, Bill Chandler, Amanda Derksen, Sandy Gamble, Clark German, Deborah Juch, Trudy Kilner, Lonnie Kozlinski, Sonia Temple, Sharon Williamson, Heidi Pierce

PRLS Staff

Ron Sheppard, Tim Spark, Donna Williams, Colleen Schalm, Kara Hamilton, Haley Amendt

Next Meeting: February 25, 2021

10:00 AM.

For more information or if you want a copy of the draft minutes from this board meeting, please contact PRLS.