



Spring 2021

Consortium Leaders Roundtable

**Convening people and perspectives:
Affordability, equity and the path forward**



Agenda and Primer

May 6 - 7 from 12:00 p.m. to 4:00 p.m. (EDT)

Welcome Consortium Leaders!



As we entered the pandemic last year, members of the Municipal Consortium expressed a strong interest in understanding what others were doing during these highly uncertain times. Supporting decision-makers from municipalities and utilities was a top priority for the Consortium. As a result, CWN facilitated a [COVID-19 Strategic Sharing Group for Consortium Leaders](#) and invited guests from March 20 to July 23, 2020.

In the fall of 2020, CWN staff reached out to Municipal Consortium members across Canada through one-on-one meetings to gauge current challenges. The common threads to these conversations focused on affordability, financial sustainability and governance, particularly as municipalities faced pressure to continue their services as the financial purse strings were drawn even tighter. Equity was another ongoing and growing point of concern among water leaders due to global and national events regarding equity among the citizens within our communities.

CWN's decision to pause Blue Cities in 2021 recognized the need to 'stay safe.' However, our focus on supporting the Municipal Consortium and advancing strategic conversations remains. Considering how to best achieve this, CWN staff have focused their efforts on tailoring spring and fall roundtables that connect and convene people and perspectives and curate knowledge and best practices to accelerate, advance and improve water management decisions.

In 2019, CWN identified four cross-cutting themes for the Municipal Consortium:

- Crossing the public-private divide
- Identifying shared risks and co-benefits that create the best business case for actions
- Prioritizing and addressing "forever/everywhere" chemicals
- Achieving equity and improved public engagement in municipal water management

These themes continue to resonate with water/wastewater/stormwater managers and underpin integrated water management in our communities. The Spring 2021 Leaders Roundtable will focus on affordability and the broader lens of equity. We will host candid conversations on full cost accounting, knowing your customers, defining affordability needs at a local level and the various dimensions of equity. This journey will build toward the discussion at the Fall Leaders Roundtable in November, where we will focus on financial sustainability and utility governance.

Our conversations are as good as your participation, so please come with your ideas, experiences and knowledge to share with your peers.

Warmest regards,

Sandra Cooke

Director, Municipal Consortium

CONSORTIUM LEADERS ROUNDTABLE – AGENDA

Day 1 – Thursday, May 6, 2021

12:00 PM Eastern time	Event link: https://live.remoco.com/e/cwn-leaders-roundtable-spring-20 Enter REMO and get settled at a table (technical support will be available). This is also an excellent time to reconnect with other Consortium Leaders. Please bring a mobile device to participate in polls during the sessions.
12:20 PM	Welcome – Bernadette Conant, CEO, Canadian Water Network Roundtable Framing – Sandra Cooke, Director, Municipal Consortium
12:40 PM	Stepping Stone #1: Capturing full utility costs Format: Presentation and facilitated table breakout discussions To achieve affordable, equitable and financially sustainable water systems, municipalities/utilities must begin with full cost accounting, including longer-term or future costs. During this session, we will discuss how utility costs can be captured more fully, as well as the challenges that Consortium Leaders are encountering in “balancing the books.”
2:00 PM	Break / Networking
2:20 PM	Stepping Stone #2: Knowing your customers to inform targeted affordability programs Format: Keynote, followed by a fishbowl discussion* Keynote: Matthew Pluke, Sustainability Leader, Anglian Water Services Limited Customer affordability is dependent on local community and economic conditions. Consequently, each community must define affordability based on its unique circumstances. Various data (e.g. population demographics, poverty indicators and local economic projections) can be compiled and analysed to inform the development of tailored affordability programs, customer outreach and communications, as well as future optimization efforts. <i>* For those who are new to the fishbowl format: This is a panel with an open chair. At any point during the discussion, Consortium Leaders can move into the empty chair to contribute or step down to make space for another person.</i>
3:45 PM	Synthesis and wrap-up
4:00 PM	Adjourn Leaders Roundtable (Day 1)
4:30 PM	REMO platform closes

Day 2 – Friday, May 7, 2021

12:00 PM Eastern time Event link: <https://live.remo.co/e/cwn-leaders-roundtable-spring-20>
Enter REMO, get settled at a table and reconnect with other Consortium Leaders ([technical support](#) is available). Please bring a mobile device to participate in polls.

12:20 PM **Welcome** – Carl Yates, Chair, Canadian Water Network
Recap of Day 1 (May 6th) – Sandra Cooke, Director, Municipal Consortium

12:40 PM **Stepping Stone #3:**
[Understanding and defining affordability at the local level](#)
Format: Presentation and table breakout discussions
There is emerging recognition that municipal/utility affordability cannot be universally defined; it must be based on local factors and needs. Recognizing this, we will explore some of the elements that can define and inform community affordability. We will bring together insights from our earlier discussions and begin to shape a path for moving to more affordable service delivery.

2:00 PM **Break / Networking**

2:20 PM **Stepping Stone #4:**
[Affordability, equity and the path forward – panel discussion](#)
Moderator:
Cathy Bernardino Bailey, Executive Director, Greater Cincinnati Water Works
Panelists:
Joanne Nelson, PhD student, University of British Columbia
Jeanna South, Director of Sustainability, City of Saskatoon
Manny Teodoro, Associate Professor, University of Wisconsin-Madison
Renée Willette, Vice President, Programs and Strategy, US Water Alliance
Exploring the affordability of water in Canada requires careful consideration of equity issues — such as income, race and ethnicity, age, language, neighbourhood and other social determinants of health. Viewing water through an equity lens can also span generations, given the lifespan of water infrastructure. Our final panel will include experts from across sectors, including other utilities, public health and other areas of the world to discuss water servicing that can bridge and connect our common goals.

3:45 PM **Synthesis and looking forward | Save-the-date: Fall 2021 Roundtable**

4:00 PM Adjourn Spring 2021 Leaders Roundtable

4:30 PM Platform closes

CONSORTIUM LEADERS ROUNDTABLE – PRIMER

Background on affordability and equity

The Leaders Roundtable is a bi-annual opportunity for Consortium Leaders to participate in structured discussions on key water management issues. The Spring 2021 Leaders Roundtable will centre around key challenges and opportunities as we move toward more affordable and equitable water service delivery. Attendees will hear from Canadian and international guest experts, as well as peers from across Canada, about success stories and lessons learned.

Community water providers have long been concerned about issues of affordability and equity, but recent events such as the COVID-19 pandemic and public focus on societal inequity has prompted greater urgency to advance progress on these issues. The Spring 2021 Leaders Roundtable is an opportunity to dive deeper into these topics and begin to identify and articulate insights on actions that Consortium Leaders can take in their own communities.

CWN’s report [Balancing the Books: Financial Sustainability for Canadian Water Systems](#) provided an overview of municipal/utility state-of-practice in 2018 and identified some of the challenges involved with regards to financial sustainability. The report provided the following definitions for affordability and equity:

Affordability

Paying the same proportion of income on basic water services.

Equity

The fair allocation of costs based on system use. There are many different dimensions of equity, including equity between customers, generations and income groups.

These definitions provide a starting point for the Spring 2021 Leaders Roundtable discussions. Note: Consortium Leaders’ understanding of affordability and equity will continue to evolve, and these definitions are not intended to remain static.

The Spring 2021 Leaders Roundtable sessions will be structured sequentially as “stepping stones” that explore the key aspects of affordability and equity from a municipal/utility perspective. The first day of the Leaders Roundtable will feature two sessions on the critical components of the affordability discussions: 1) better capturing full costs and 2) developing a deeper knowledge of customers serviced by the municipality/utility. The second day will begin with a session on understanding and defining affordability at the local level, followed by a session that explores various dimensions of equity in a cross-sector panel discussion.

Stepping Stone #1: Capturing full utility costs

Session objective:

Explore how utility costs can be captured more fully and the challenges encountered in 'balancing the books'.

Format: Presentation by CWN, followed by table breakout discussions.

To achieve financially sustainable water systems while meeting local affordability and equity needs, municipalities/utilities must begin by accounting for full utility costs, including longer-term or future costs (e.g. the cost of climate change adaptation). The wide variability in the state of repair of municipal water, wastewater and stormwater systems in Canada and the socio-economic realities of the communities they support means that there is no one-size-fits-all approach to achieving financial sustainability and addressing affordability and equity. However, understanding what is needed to achieve financial sustainability and move towards more affordable and equitable service delivery requires a more thorough understanding of full utility costs. CWN's utility financing survey (2018) found that the costs that were least captured in utility financial plans were:

- Deferred maintenance/capital costs
- Future risks (including climate change)
- Environmental and resource costs
- Source protection and pollution prevention

In this session, we will delve into breakout discussions on how utility costs can be captured more fully, as well as the challenges that Consortium Leaders are encountering in achieving a fuller accounting of costs.

Discussion Questions

- Is your municipality/utility mandated to achieve full cost recovery?
- Has your municipality/utility captured future risks (including climate change) in its financial plans? If so, how did you do this? If not, what are the key challenges you are encountering in capturing these costs?
- Has your municipality/utility captured the full costs of source protection and pollution prevention in its financial plans? If not, what are the ongoing challenges in capturing these costs? (e.g., accounting for the cost of mitigating or removing CECs)
- How has moving to better accounting of full costs helped your municipality/utility address affordability concerns? Alternatively, has moving to better accounting of full costs created hurdles to affordability?

Stepping Stone #2: Knowing your customers to inform targeted affordability programs

Session objective:

Discuss how customer data and information could be used to inform the development of tailored affordability programs and assess affordability and equity needs at the local level.

Format: Keynote speaker, followed by a fishbowl discussion with the Consortium Leaders.

The affordability of water services varies by community, as each community has its own unique socio-economic, environmental and political realities. Given this, it is increasingly becoming more important for municipalities/utilities to understand their customers so that they can serve them better and make more informed decisions with respect to developing appropriate programs. For example, digging deeper into customer billing profiles by understanding household income, larger occupancy households, and total household costs, combined with spatially mapping customer locations, can yield insights for the development of programs that are fair and equitable. In-depth knowledge can also highlight opportunities for optimization of service delivery, among other benefits.

Regulators in the United Kingdom (UK) have built a successful framework to encourage water utilities to account for customer needs. This framework includes sanctions for failing to meet performance targets, and as a result, the country's utilities (which are privately operated) have developed in-depth customer engagement programs to ensure these targets are met. Anglian Water has been working to address affordability through improved knowledge of its customers. We have invited Matthew Pluke, Sustainability Leader at Anglian Water Services Limited, to share best practices on building targeted customer assistance and other programs to better serve customers and build loyalty.

Discussion Questions

- Has your utility collected more in-depth information on customers to better plan service delivery? If so, who have you engaged (e.g. other departments or agencies) to get a deeper understanding of your customers?
- Developing customer knowledge may require new workforce skills in data analytics, GIS and data visualization for developing insights to inform programs that target customers who need the most assistance. Has your municipality/utility considered acquiring or developing new workforce skills to better capture insights on customers?
- Programs on energy poverty are more advanced in some areas of Canada due to legislated mandates. Are there opportunities to learn from energy utilities in your community? If you've investigated this already, what have you learned?

Stepping Stone #3: Understanding and defining affordability at the local level

Session objective:

Explore elements that can define and inform community affordability.

Format: Presentation by CWN, followed by table breakout discussions.

There is emerging recognition that municipal/utility affordability cannot be universally defined. Rather, affordability should be defined based on local factors and needs. AWWA's M1 Manual (2017) states that defining affordability must be done at the local level, "given variations in local economic conditions, compositions of the customer base and community values." Given this insight, we will explore elements that could be used by local utilities to better understand and define community affordability. We will bring together insights from our earlier discussions on full cost accounting and understanding customer needs to shape a path toward more affordable service delivery.

Discussion Questions

- Has your municipality/utility implemented formal affordability program(s)? If so, what have been the main challenges and lessons learned from developing these program(s)?
- What elements has your municipality/utility used to understand and/or define affordability at the local level?
- From your municipality/utility's perspective, what are the main challenges to further exploring community affordability?

Stepping Stone #4: Affordability, equity and the path forward

Session objective:

Engage with a diverse panel to discuss how water services can be more equitable and what this would require at the local level.

Format: Moderated panel discussion.

Equity considerations in municipal/utility water management have largely been viewed through the lens of the affordability of water services. According to *Balancing the Books* (CWN, 2018), equity was defined as the fair allocation of costs based on system use. However, there are many dimensions of equity that go beyond the financial implications of customer classes, generations and income groups. Moving forward, more equitable water service delivery will require the consideration of social dimensions that include vulnerable and racialized communities, people with disabilities, age, language, location (e.g. neighbourhood) and potentially social determinants of health.

Cathy Bernardino Bailey, Executive Director at Greater Cincinnati Water Works, will moderate a panel discussion to help deepen our understanding of equity and explore ways to elevate and purposefully incorporate actions and approaches for equitable water services in our communities. CWN thanks Cathy and the invited panelists for their participation:

- Joanne Nelson, PhD student, University of British Columbia
- Jeanna South, Director of Sustainability, City of Saskatoon
- Manny Teodoro, Associate Professor, University of Wisconsin-Madison
- Renée Willette, Vice President, Programs and Strategy, US Water Alliance

Connecting the Dots...

Throughout the 2021 Spring Leaders Roundtable, CWN will weave together the threads from our discussion and generate key insights for a post-meeting capture. Our meeting in May will prime discussions on financial sustainability and governance at the **2021 Fall Leaders Roundtable**, which will be held virtually on **October 19 - 20**.

Key insights from the Spring 2021 Leaders Roundtable will be compiled by CWN staff and shared in a post-meeting capture.

Thank you for taking the time to prepare for the upcoming Spring 2021 Consortium Leaders Roundtable. We look forward to a productive two days of discussion!

Questions about attendance, the agenda or primer?

Contact Sandra Cooke, Director, Municipal Consortium at scooke@cwn-rce.ca.

CONSORTIUM LEADERS ROUNDTABLE – CONFIRMED ATTENDEES

Consortium Leader		Organization
Bernadette Conant	CEO	Canadian Water Network
Carl Yates	Chair, Board of Directors	Canadian Water Network
Mike Darbyshire	General Manager	Alberta Capital Region Wastewater Commission
Ted Robbins	General Manager Integrated Water Services	Capital Regional District (Victoria)
James Lota	Deputy Director, Engineering	City of Burnaby
Francois Bouchart	Director, Water Resources	City of Calgary
Nancy Stalker	Acting Director, Water Services	City of Calgary
Joseph Green	Project Engineer	Durham Region
John Presta	Director, Environmental Services	Durham Region
Susan Ancel	Director, One Water Planning	EPCOR Water Services
Stephen Stanley	Senior Vice President, Commercial Services	EPCOR
Reid Campbell	Director Engineering and Technology Services	Halifax Water
Cathie O'Toole	General Manager	Halifax Water
Andrew Farr	Commissioner of Public Works	Halton Region
Kiyoshi Oka	Director Water and Wastewater System Services	Halton Region
Mark Bainbridge	Director Water & Wastewater Planning & Capital	City of Hamilton
Andrew Grice	Director, Hamilton Water	City of Hamilton
Bu Lam	Director Sanitary and Stormwater Utilities	City of Kitchener
Greg St. Louis	Director, Utilities Gas and Water Division	City of Kitchener
Brent Burton	Division Manager, Policy and Planning	Metro Vancouver

Consortium Leader		Organization
Hervé Logé	Chef de division, Service de l'eau	Ville de Montréal
Terry Bender	Vice President, Operations	Ontario Clean Water Agency
Alicia Fraser	Vice President of Operations, South Peel	Ontario Clean Water Agency
Marilyn Journeaux	Director, Water Services	City of Ottawa
Scott Laberge	Director (Acting), Technology, Innovation, Engineering Support Services	City of Ottawa
Elaine Gilliland	Director, Wastewater	Region of Peel
Elvis Oliveira	Director Water and Wastewater Infrastructure Planning, Partnerships and Compliance	Region of Peel
Kurtis Doney	Director, Water, Waste and Environment	City of Regina
Greg Kuntz	Manager, Energy & Sustainable Solutions	City of Regina
Matt Jurkiewicz	Director, Construction and Design	City of Saskatoon
Brendan Lemke	Director of Water & Waste Operations	City of Saskatoon
Russ Munro	Director, Saskatoon Water	City of Saskatoon
Genevieve Russell	Project Manager, Sustainability	City of Saskatoon
Michelle Warywoda	Director of Environment	City of Thunder Bay
Michael D'Andrea	Chief Engineer and Executive Director, Engineering and Construction Services	City of Toronto
William Fernandes	Director, Water Treatment and Supply	City of Toronto
Frank Quarisa	Director Wastewater Treatment	City of Toronto
Rodney Bouchard	General Manager	Union Water Supply System
Jim Keech	President and CEO	Utilities Kingston
Jim Miller	Director, Engineering and HR	Utilities Kingston
Heather Roberts	Director, Water & Wastewater Services	Utilities Kingston
Jimmy Zammar	Director, Integrated Strategy and Utilities Planning, Engineering Services	City of Vancouver

Consortium Leader		Organization
Nancy Kodousek	Director, Water Services	Region of Waterloo
Pam Law	Manager of Engineering and Planning	Region of Waterloo
Olga Vrentzos	Manager of Water Operations	Region of Waterloo
Ritu Gupta	Manager, Business Planning & Operations	York Region
Wendy Kemp	Director (Acting) Infrastructure Asset Management	York Region
Erin Mahoney	Commissioner, Environmental Services	York Region
Brent Marissen	Senior Project Manager	York Region
David Szeptycki	Director, Strategy and Innovation Environmental Services	York Region

Canadian Water Network's Canadian Municipal Water Consortium

