

Municipal Consortium Strategic Sharing Groups

Terms of Participation: Advancing Levels of Service in the Context of Uncertainty

Strategic Sharing Groups provide unique and meaningful peer-to-peer sharing opportunities on emerging strategic issues. CWN facilitates an environment for confidential dialogue among participating senior municipal/utility managers, and where appropriate, invites leading experts to share their knowledge. The discussion is directed by the group, with support from CWN staff who frame the issue, facilitate discussions, invite relevant guest experts, incorporate insights from the international community, create meeting captures, and use critical takeaways and learnings to shape future Consortium initiatives to support the municipal community.

1.0 General Group Structure and Terms of Participation

- In the establishment of a Municipal Consortium Strategic Sharing Group topic, CWN will communicate with relevant organizations (CWWA, NWWBI, etc.) which may have similar topic-area sharing initiatives underway to ensure duplication is limited and the existing knowledge base is built upon;
- A minimum of 5 participants from CLG designates or their staff is required for the commencement or continuation of a Municipal Consortium Strategic Sharing Group;
- At the commencement of a new Municipal Consortium Strategic Sharing Group, prospective members have an opportunity to provide input on the parameters of the group participation, including method and frequency of interaction, minimum time and/or participation commitment, clarify the level of effort, prior to committing;
- Participants agree to a common set of 'rules of engagement' when joining a group, including aspects of mutual sharing, active participation, and privacy;
- All elements of the Municipal Consortium Strategic Sharing Groups – including access to participation, meeting captures, and related outputs – are open to all CLG members, provided they agree to adhere to the group's privacy preferences (see above);
- CWN staff will facilitate Municipal Consortium Strategic Sharing Groups, including setting up and moderating regular meetings, preparing meeting captures, initiating discussions on periodic evaluation of the status of the group (e.g. is it continuing to add value, has it

achieved its purpose, should a new topic be proposed, is there interest for involvement on related future initiatives, etc.), and identifying next steps.

2.0 Strategic Sharing Group: Advancing Levels of Service in the Context of Uncertainty

In this Strategic Sharing Group we will explore **strategies for advancing levels of service for municipal water, wastewater, and stormwater systems** in the context of changing customer expectations, evolving asset management programs, financial constraints, equity and affordability considerations, and challenges such as climate change and the COVID-19 pandemic.

Following further discussion with the Consortium members, Canadian Water Network has identified a need to improve and update the national dialogue around levels of service. As the country emerges from the COVID-19 pandemic, providing accessible and affordable water, wastewater and stormwater services has rapidly propelled to the forefront of conversation among utility decision-makers. Similarly, the need for rapid sharing of knowledge during the initial stages of the pandemic highlighted the importance of customer engagement in defining level of service expectations. Moving forward in a financially responsible and sustainable manner remains a core area of concern for municipalities and utilities.

The goal of the group is to discuss and share our collective knowledge on level of service targets for water, wastewater and stormwater and explore how to advance these discussions within the sector. Consideration will be made to the possible implications of the pandemic and whether level of service targets may have to change. Facilitated discussions will focus on how level of service targets are **set and measured, how this has changed** in the new reality, **who is and who should be involved** in these determinations, and the **role of collaborating with other sectors** in achieving economic, environmental, social and organizational co-benefits as they relate to levels of service.

The objective of the group will be:

- To learn from leading municipal/utility water managers across Canada on what progress has been made on this topic, both formal or informal, including how levels of service intersect with risk management frameworks and design standards;
- To identify shared challenges and roadblocks experienced, including bridging the disconnect between levels of service and financial sustainability and affordability;

- To support each utility's strategic program development by exploring initiatives, such as customer engagement and feedback, that could help to inform level of service targets;
- To advance the discussion on utility management strategies and best practices as it relates to establishing or revising level of service targets in the wake of COVID-19 and similar challenges;
- To explore how new technologies, such as data-driven optimization can play a role in tracking, maintaining or elevating levels of service; and,
- To explore how integration and collaboration across sectors could advance service delivery and achieve co-benefits.

3.0 Method of Interaction

The primary mode of interaction will be a series of virtual calls using the Microsoft Teams platform. A kick-off meeting will be scheduled by CWN staff in late September. The meeting will be structured and facilitated by CWN staff for the purpose of:

- 1) Having members meet and agree to the objectives of the group, structure/mode of communication and other 'rules of engagement'; and
- 2) Gaining a basic understanding of the challenges and gaps in this space through structured sharing of responses to high-level questions posed by CWN staff. Questions will be provided in advance to guide future discussion of the group;

Regular meetings will be scheduled thereafter by CWN and based on the availability of participating members. Although meetings will be moderated by CWN staff, group members will be asked to verbally report on challenges and share approaches/best practices around agreed upon discussion topics;

- CWN staff, with input from the group, will identify key common challenges and bring on guest experts as needed to a group call;
- On an as-needed basis, group members may share relevant material by email to the group;
- CWN staff to consolidate and provide an outline of key discussion topics on which utilities will frame their sharing to the group on the subsequent teleconferences;
- CWN staff will continually assess and evaluate the necessity of the Strategic Sharing Group and determine next steps with input from the group.



Information shared in the group will be confidential and will be posted by CWN to the private “members only” website for the CLG. Strategic Sharing Group members will have an opportunity to review and approve the meeting capture content prior to CWN’s posting the captures to the “members only” website.