

Office of Utility Coordination (OUC) Frequently Asked Questions (FAQs)

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1. What is the OUC?

Supported by the Building Transit Faster Act (BTFA), Metrolinx launched the Utility Coordination Program (UCP) in Spring of 2020. The objective of this program is to set the stage for more streamlined transit project delivery by introducing new, more coordinated processes for utility relocation work.

The Office of Utility Coordination (OUC) is a new function set up to help enable these new processes and improve utility coordination through enhanced business intelligence, enablement, and visualization capabilities. The OUC will track utility relocation data and cases to ensure that the new processes are sustained.

2. What is the OUC's role?

Collect and report on data - The OUC collects and processes data inputs that pertain to Metrolinx's operational and legal compliance performance in the coordination of utility work. The OUC is the one-stop-shop for the utility coordination activities of the province's four priority subway lines.

Geospatial information hub - The OUC serves as a geospatial data hub (Spatial Hub) with information on utility assets, artifacts, and related documents. As a single source of truth, the geospatial data in the OUC can be leveraged by key stakeholders in various phases of utility work from the planning phase to the maintenance and operations phase post-project.

Operations service - The OUC serves as an operations service to drive transparency and accountability among the various parties involved in the priority transit projects. It provides ticketing and case management capability to record, report and track utility coordination activities such as conflicts, BTFA lettering, actions, assignments of work, issues or problems, and additions of new data and documents.

3. Why is Office of Utility Coordination (OUC) set up?

Over the next decade, Ontario will be building almost 30 kms of new subway in addition to other major transit projects. Delivery of these projects requires locating, treating and relocating utility infrastructure acting as physical barriers to construction. The current relocation process presents one of the largest potential risks to delivering major capital infrastructure projects on time and within budget. The existing utility relocation process must therefore be updated to expedite the delivery of Ontario's five priority transit projects.

Furthermore, the program is needed to:

- Improve stakeholder coordination;
- Avoid delays that are easily mitigatable; and
- Enforce and formalize processes mandated by the BTFA.

4. What is the scope of the Utility Coordination Program?

The scope of the Utility Coordination Program is to:

- Develop a Utility Relocation Guideline that outlines the new processes for coordinating relocation work transit project delivery;
- Update Mx utility relocation processes and evaluate systems and data required to comply with the regulations of the BTFA legislation;
- Provide change management services to ensure impacted stakeholders are aware of, aligned around and engaged in, project activities (i.e., through a variety of assessment, communication and training initiatives);
- Implement process and technology changes to support new ways of working and system/tech integrations as necessary; and
- Lay the groundwork for data collection, reporting and document management that will oversee utility coordination moving forward in the form of the Office Utility Coordination.

5. What are the benefits of new utility process?

The new process will benefit stakeholders as a result of the following changes:

- Enhanced data access and accuracy: More formalized processes, better document management and more open and timely information sharing between stakeholders will enhance access to utility-related data and render said data more accurate;
- More streamlined processes: Future processes will have fewer redundant steps, alleviating unnecessary work and allowing for easier access to required land. Mx will also have the power to conduct due diligence work and remove physical barriers with appropriate notifications, reducing delays;
- More communication points: There will be more frequent interaction points and more clear hand-offs between stakeholders to facilitate enhanced coordination between functions and organizations;
- Improved notification process: New parameters will be placed around relocation notices of major project milestones and decisions, including a formal Lettering process, to ensure all stakeholders are aware of key project details and timelines;
- Clearer roles and responsibilities: Stakeholders will be provided with clear guidance as to who owns which part of the process and how to work in partnership, improving speed of delivery and reducing the duplication of work;

- New process for managing disputes: The relocation process will be accompanied by a new, clearer process for managing disputes between stakeholders if timelines are not met, enhancing accountability to meet deadlines.

6. How will the program impact Mx employees?

Mx will assume more control over the relocation process, thereby increasing their responsibility in setting and enforcing guidelines, as well as managing and following-up on disputes. While people in different roles at Mx will experience different impacts at varying levels of impact, those in roles relating to utility coordination may be asked to carry out new activities or perform existing activities in a different manner as a result of the program.

7. How will the program impact Utility Companies?

Utility companies will be impacted by the program as they may be expected to carry out new activities or perform existing activities in a more formalized manner. The BTFA will establish a structured framework for the interaction between utility companies and Mx. One significant impact is that utility companies will have increased accountability for project schedules and costs, including the potential for financial penalties in case of avoidable construction delays.

With the streamlined process, there will be a reduction in redundant tasks. Instead of multiple meetings with various stakeholders to discuss one asset affecting multiple projects, utility companies will be able to transfer knowledge once, saving both time and effort.

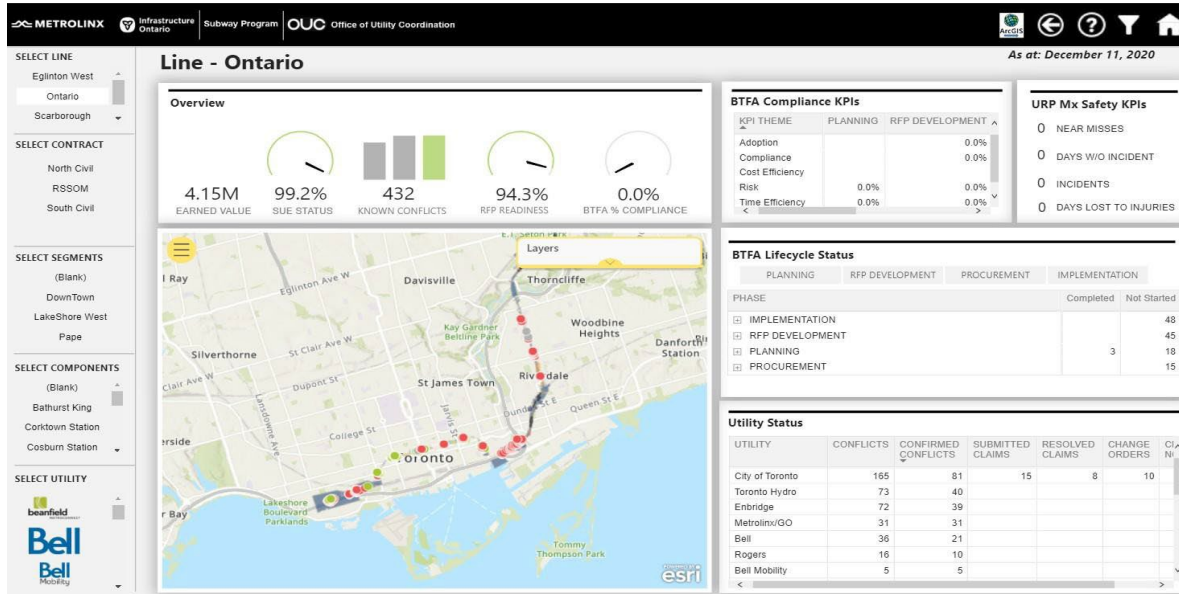
8. What is the approach to encouraging utility company collaboration?

The *Building Transit Faster Act* (BTFA) provides the legislative powers for Metrolinx and Infrastructure Ontario to formally request data from impacted utility companies. The program team is currently working with each of the utility companies to understand current ways of working, existing pain points and to find the least intrusive and mutually beneficial way to collaborate moving forward.

9. What is the OUC Dashboard?

The OUC KPI & Ticket Dashboards are a centralized, interactive means of monitoring, measuring, analyzing, and extracting business insights from the defined KPIs monitored by the OUC. Powered by cloud technology and advanced data analytical

tools, the OUC Dashboard displays aggregated information in an intuitive and visual way, like so¹:



¹ Includes mock data for demonstration purposes

10. How often will the OUC Dashboard data be refreshed?

Depending on the type of data and the data's updating frequency, the dashboard will get refreshed at different intervals. Most KPIs will be updated periodically as they become available, but some of the KPIs are updated annually. The dashboard captures the last-known available data points. More information on when data was last updated can be found in the Navigation view in the KPI Dashboard.

11. Who will have access to the OUC dashboard?

All employees from Metrolinx, Infrastructure Ontario and the Ministry of Transportation Ontario will have access to the dashboard. Due to confidentiality considerations, Project Co. and Utility Companies will have access to utilities own tickets only. Dashboard access for Technical Advisors will be limited to their respective lines. Access to the dashboard is administered through login credentials provided by the OUC.

12. What is a 'KPI' and what KPIs are being monitored by the OUC?

KPI stands for Key Performance Indicators. For the OUC, KPIs are quantifiable data tracked to inform the progress and success against the utility coordination targets and objectives. These KPIs are developed and defined based on widely accepted

industry standards, as well as the findings from interviews with subject matter experts.

For the OUC, KPIs are summarized in the following eight categories: Cost Management KPIs, Schedule Management KPIs, Change Management KPIs, Dispute Management KPIs, Safety KPIs, Conflict KPIs, Subway Program Specific KPIs, and BTFA Lifecycle KPIs.

13. What is the process for providing the KPI data?

We will work one-on-one with you to determine the most efficient way to get it. The OUC is not looking for net new data; the focus will be pulling existing data into a single source of truth for everyone. Therefore, the OUC will aim to not create any new or redundant work. The OUC is also not looking to replace anything, the main objective is to consolidate information.

14. What is the timeline for issuing the BTFA Letter, from the request being made to the letter being issued?

The OUC acknowledges the receipt of the BTFA Letter Request within 1-2 business days and aims to provide a draft BTFA Letter for review by the Mx Utilities Manager or their authorized Technical Advisor within 1-2 business days.

15. How does the process change when the relocations are being led by Project Co. (PCo.)?

A number of the BTFA Letters such as Letter 1, 2, 5A, 5B, are issued before PCo. is onboard. These letters are primarily exchanged between Mx and utilities companies before the Implementation Phase. When PCo. is involved, the designs have been finalized. PCo. is required to inform the Mx Utilities Manager that Letter 7A must be sent to formalize the completion date for the work. Otherwise, the BTFA Lettering process is the same.

16. Do BTFA letters get issued retroactively?

No, letters are not issued retrospectively.

17. Is Letter 7A strictly for construction or design of Preparatory Activity?

Letter 7A refers to the construction activities only, not design activities.

18. Does the process apply to Toronto Water?

Since the relocation work of municipal infrastructure will mostly be carried out by contracting companies, and many of the work are also being done as parts of PCo while they do their street work. Therefore, no BTFA Letters will be issued to municipalities.

19. In the Act, there is a reference to the timeline that the work must be completed within 60 days after receiving the notification. How does this timeline work with other existing agreements with utility companies? Are these agreements considered default timelines?

The 60-day requirement serves as a fallback in case there is no negotiated timeframe in the existing agreements. Typically, the negotiated timeframe is much longer than 60 days. It is based on the timelines and durations agreed upon with the utility companies. For instance, a letter is issued specifying the deadline for completing the work. This timeframe can range from 6 to 9 months during the design and planning phase, or it can be as short as 6 weeks, depending on the actual construction and when the letter is issued.

20. Is this the only interface in terms of communication, or are emails or other forms of communication conducted when something goes wrong, assuming that calls will be made to work on the schedule?

This interface is meant to supplement regular communications between all project stakeholders through meetings, emails, etc. These letters are used to formalize decisions related to deadlines, schedules and cost estimates.

21. Is there a tracker to monitor the BTFA activities?

A BTFA Lifecycle tracker is controlled and maintained by the Mx Utilities Managers, with the support of their Technical Advisor to track all the BTFA activities throughout each project phase.

22. How would Mx accommodate utility companies with permits, corridor access, etc. which Mx is in control of?

If the utility companies anticipate any delays in permit or corridor access applications or have not received a reply from Mx, we encourage them to reach out to the Utilities

Managers, who will help expedite the process.

23. Is Mx/ IO considering extending BTFA practices to non-priority projects?

Bill 171 does provide the ability for the province to designate additional projects as priority projects.

24. Will the dashboard capabilities be extended to other projects to make the information available to other stakeholders?

Yes, we intend to utilize the tools for other projects in the future.