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OVERVIEW

Metrolinx has initiated a study of the electrification of the entire GO Transit rail system as a future alternative to diesel trains now in service. This comprehensive study will consider all potential benefits and costs associated with replacing diesel with electric propulsion for GO trains in the future. A joint venture of Delcan Corporation and Arup Group Inc. is leading the study, which is expected to be completed in a year – by the end of 2010.

Stakeholder Engagement – A Key Part of the Study

Metrolinx and its consultant study team recognize the importance of reaching out to and engaging stakeholders as part of the electrification study process. Lura Consulting – the study team lead for stakeholder engagement and communications – has developed a plan to:

- Educate stakeholders about the study process and electrification options, such that they can provide informed feedback during the study; and
- Facilitate input from stakeholders during throughout the study process, in order to inform decision-making and study conclusions.

The plan has been specifically developed to address the key principles – objective, comprehensive, inclusive and evidence based – that were established for the study by Metrolinx, in consultation with a Community Advisory Committee (CAC) which provided substantive guidance to Metrolinx on the study terms of reference.

Outreach and Engagement Methods

The stakeholder engagement and communications program includes a variety of face-to-face and web-based approaches to reach out to and engage community and industry groups, GO Transit rail system users, the general public and First Nations in the electrification study. Engagement methods are expected to include:

- Formation of an Electrification Study Stakeholder Working Group;
- Briefings for municipal, provincial and federal government agencies;
- Technical working groups for industry service providers;
- School-based consultation with youth – future users of the GO system;
- Interaction with GO’s Customer Service Advisory Committee – made up of rail system users; and
- Innovative community engagement sessions and web-based e-consultation for the broader public.

Information about the study and electrification options will be communicated broadly through an interactive study website, email updates and newsletters, and the use of existing Metrolinx and GO Transit networks and communications channels. A dedicated email address and study contact will be established to ensure “one-window” access to the study team and prompt responses to all feedback and inquiries.
1. INTRODUCTION

1.1 BACKDROP – THE ELECTRIFICATION STUDY

The Greater Toronto and Hamilton Area (GTHA) is Canada’s largest urban region comprising the single-tier municipalities of Toronto and Hamilton, and four regional municipalities. With rapid growth, the region’s population is expected to expand by nearly 50% to 8.6 million residents in 2031. Metrolinx was created in 2006 to develop and implement an integrated and comprehensive multi-modal transportation plan to solve the region’s transportation challenges.

In late 2008, Metrolinx published a Regional Transportation Plan, “The Big Move”, a multimodal vision for regional transportation to strengthen the economic, social and environmental sustainability of the GTHA. GO Transit, the inter-regional transportation service for the GTHA, has played a key role in serving the GTHA commuter market. The evolution and development of the GO rail system is a major component in the realization of the vision in “The Big Move” in terms of the reduction of car trips, increased accessibility to the transit network and the achievement of ambitious environmental targets.

GO Transit currently uses diesel-electric locomotives in push-pull operations with bi-level passenger coach and cab cars. In early January 2010, Metrolinx initiated an Electrification Study to examine the economic, social, environmental, operational, health and technological costs and benefit factors for conventional and future diesel and electric technologies. The study will assess future technology options, review the viability of these options in various corridor environments as well as at the network level, and assist Metrolinx in developing a business case for meeting its vision of an integrated multimodal transportation system for the GTHA region.

The Electrification Study is being undertaken for Metrolinx by a joint venture of Delcan and Arup, with support from several sub-consultants. Lura Consulting is the study team lead for stakeholder engagement and communications.

1.2 OVERVIEW OF THE STAKEHOLDER ENGAGEMENT AND COMMUNICATIONS PLAN

This Stakeholder Engagement and Communications Plan for the Electrification Study outlines how Metrolinx and the consultant study team will reach out to and engage GTHA stakeholders during the development of the Electrification Study, which is expected to be completed in a year – by the end of 2010.

The Plan has been specifically developed to address the key principles – objective, comprehensive, inclusive and evidence based – that were established for the Electrification Study by Metrolinx, in consultation with a Community Advisory Committee (CAC) which provided substantive guidance to Metrolinx on the terms of reference for the study. The Plan is also designed to ensure that GTHA stakeholders are provided with the opportunity to contribute focused feedback on key outputs identified by Metrolinx and the CAC for the study, including a
comprehensive and detailed analysis of the net costs and benefits for each technology option including:

- Capacity and service impacts, including reliability of service;
- Environmental and health impacts;
- Community and land use impacts;
- Economic impacts; and
- System costs, funding, financing and delivery.

Following this Introduction, the Stakeholder Engagement and Communications Plan consists of seven key sections:

- Section 2: Guiding Principles and Objectives;
- Section 3: Key Stakeholder Audiences for Engagement;
- Section 4: Engagement Mechanisms by Audience;
- Section 5: Communication Tactics to Support Engagement;
- Section 6: Engagement and Communications Tactics by Study Phase; and
- Section 7: Next Steps – Early Implementation of the Plan

2. GUIDING PRINCIPLES AND OBJECTIVES

The following principles and objectives are based on those developed by Metrolinx and the CAC for the Electrification Study. They are proposed to guide development and implementation of the Stakeholder Engagement and Communications Plan, and to provide a basis for ongoing monitoring and evaluation as the Plan is implemented.

2.1 GUIDING PRINCIPLES

- **Objectivity**: The study (and associated engagement and communications program) will be conducted through a transparent, step-by-step process, such that study outcomes are traceable and readily understood by stakeholders.

- **Comprehensiveness**: Multiple opportunities for stakeholder participation – including face-to-face meetings and web-based consultation – will be provided during the study, backed by a multi-faced communications program, designed to generate broad awareness of the study and electrification issues and options.

- **Inclusiveness**: The study will strive to engage a broad spectrum of stakeholders – reflecting the ethno-culturally diverse and complex stakeholder environment in the Greater Toronto and Hamilton area – throughout the study process.
• **Evidence-Based**: The study team will provide stakeholders with robust and credible information on electrification options – based on the most up-to-date research and methods – to enable informed participation in the study process.

• **Traceability**: The results of the stakeholder engagement program will be clearly documented and the impact of participant input on decision-making will be demonstrated.

2.2 **OBJECTIVES**

1. To **educate stakeholders** about the study process and electrification options, such that they can provide informed feedback during the study.

2. To **generate broad awareness** of the study and opportunities for participation throughout the study process.

3. To **facilitate constructive input** from stakeholders during the key phases of the study process, in order to inform decision-making and study conclusions.

4. To **document feedback** received through the engagement process and to demonstrate the impact of stakeholder engagement on decision-making and study conclusions.

3. **KEY STAKEHOLDER AUDIENCES FOR ENGAGEMENT**

The Stakeholder Engagement and Communications Plan includes mechanisms to reach out to and engage a wide range of stakeholders who may be interested in or affected by the Electrification Study. Key stakeholder audiences for engagement in the study include:

- **Former Community Advisory Committee (CAC) Members** – Although the CAC has fulfilled its initial mandate, the 16 members will be invited to continue their participation through stakeholder working groups (see Section 4.0) and other engagement channels.

- **Engaged non-government stakeholders**, including:
  - Environment and health groups (e.g., Canadian Environment Defence Fund)
  - Community groups (e.g. Ratepayer groups; Community-based or GO corridor-based advocacy groups)
  - Land use and social planning groups (e.g. People Plan Toronto; Ontario Professional Planners Institute)
  - Transportation advocacy and commuter groups (e.g., Transport 2000; Clean Train Coalition; transit advocates)
  - Business and economic groups (e.g., Boards of Trade; Chambers of Commerce, development industry)
  - Academics
• **Government stakeholders**, including:
  - Municipalities
    - Municipal associations
    - Regional and area municipal staff
    - Regional and area councillors
  - Provincial government
    - Ontario Ministry of Transportation (lead ministry)
    - Provincial ministry staff with a related interest or mandate (e.g., MTO; OMHLTC; MEI; MOE; MMAH; MF)
    - MPPs
  - Federal government
    - Federal ministry/agency staff with a related interest or mandate (e.g., TC, Infrastructure Canada)
    - MPs

• **Industry Service Providers**
  - Rail (GO Transit; VIA; CN; CP; Union Station)
  - Electrical Infrastructure and Supply (Toronto Hydro; OPA; OPG; Hydro One)

• **Users/commuters** – riders of the GO system

• **General public** – residents of Greater Toronto and Hamilton Area (GTHA) and communities served by the GO system
  - Youth – future users of the GO system

• **First Nations** – First nation organizations that must be contacted/consulted under the provincial “duty to consult”

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**Stakeholder Engagement – A Key Part of the Study**

Metrolinx and its consultant study team recognize the importance of reaching out to and engaging stakeholders as part of the electrification study process. Lura Consulting – the study team lead for stakeholder engagement and communications – has developed a plan to:

- Educate stakeholders about the study process and electrification options, such that they can provide informed feedback during the study; and
- Facilitate input from stakeholders during throughout the study process, in order to inform decision-making and study conclusions.
The plan has been specifically developed to address the key principles – objective, comprehensive, inclusive and evidence based – that were established for the study by Metrolinx, in consultation with a Community Advisory Committee (CAC) which provided substantive guidance to Metrolinx on the study terms of reference.

Outreach and Engagement Methods

The stakeholder engagement and communications program includes a variety of face-to-face and web-based approaches to reach out to and engage community and industry groups, GO Transit rail system users, the general public and First Nations in the electrification study. Engagement methods are expected to include:

- Formation of an Electrification Study Stakeholder Working Group;
- Briefings for municipal, provincial and federal government agencies;
- Technical working groups for industry service providers;
- School-based consultation with youth – future users of the GO system;
- Interaction with GO’s Customer Service Advisory Committee – made up of rail system users; and
- Innovative community engagement sessions and web-based e-consultation for the broader public.

Information about the study and electrification options will be communicated broadly through an interactive study website, email updates and newsletters, and the use of existing Metrolinx and GO Transit networks and communications channels. A dedicated email address and study contact will be established to ensure “one-window” access to the study team and prompt responses to all feedback and inquiries.

4. ENGAGEMENT MECHANISMS BY AUDIENCE

Specific mechanisms are proposed to engage the above listed key stakeholder audiences in the five phases set out by the consultant team work plan include:

I. “Setting Tracks for the Future” – project initiation, study approach (including engagement and communications plan), high level decision-making framework

II. “Today’s Tracks” – Objectives, baseline conditions, pre-screening criteria for technology options

III. “Transforming Tracks for the Future” – Alternative technology options and network scenarios

IV. “Setting Tracks for the Future” – Screening of technology options and network scenarios, short-list of options/scenarios
V. “Tracks for the Future” – Assessment of short-list, study conclusions (including phasing and business case)

4.1 ENGAGED NON-GOVERNMENT STAKEHOLDERS

Electrification Stakeholder Working Group – A series of up to 4 workshops/working meetings with engaged non-government stakeholders is proposed during Phase II – V of the study.

- Participation would be by invitation, based on Metrolinx’s existing stakeholder list (approximately 75 stakeholders) and membership of the CAC; and a “gap analysis” of the Metrolinx stakeholder list (75) based on the following “sectors” to ensure a representative cross-section of participants and from each of the GO corridors:
  - Environment and health groups (e.g., Pollution Probe; Clean Air Partnership)
  - Community groups (e.g. Ratepayer groups; Community-based advocacy groups)
  - Land use and social planning groups (e.g. People Plan Toronto; Ontario Professional Planners Institute)
  - Transportation advocacy and commuter groups (e.g., Transport 2000; Clean Train Coalition)
  - Business and economic groups (e.g., Boards of Trade; Chambers of Commerce)
  - Academics

- It is anticipated that each workshop/working meeting will begin with a plenary session (introductions, study team presentations) followed by topic-based breakouts/working sessions that are based on mirror the key outputs (and decision-making categories) for the study:
  - Capacity and service impacts
  - Environment and health
  - Community and land use
  - Economic impacts
  - System costs, funding and financing and delivery

- It is also anticipated that select government stakeholders and industry service providers will be invited to participate in the above topic-based workshop breakouts, along with non-government stakeholders

- Proposed meeting schedule and topics:
  - Meeting #1 (Early in Study – Phase II): Orientation on study; Provide feedback on study approach, objectives and pre-screening criteria
  - Meeting #2 – to be confirmed (Phase III): Provide feedback on development of alternative technology options and network scenarios
  - Meeting #3 (Mid-Study – likely Phase IV): Provide feedback on short-list of options/scenarios
  - Meeting #4 (Late-Study – Phase V): Provide feedback on assessment of short-list and study conclusions

- Suggested mandate for Electrification Stakeholder Workshops:
  - Act as a sounding board for the study team to share and discuss ideas and findings
  - Provide feedback, critiques and suggestions on proposed study approaches, concepts and materials
  - Participate in discussions on electrification options, including the criteria to be used to evaluate options, the identification of short-listed scenarios, and study conclusions
Final Stakeholder Engagement and Communications Plan
February 12th, 2010

- Provide a sense of the broader community’s expectations and potential reactions to the study, as well as how these might be addressed
- Need to prepare TOR for Electrification Stakeholder Workshops

4.2 GOVERNMENT STAKEHOLDERS AND INDUSTRY SERVICE PROVIDERS

Municipal Engagement – A two-pronged approach for municipal engagement is envisioned:
- **Electrification Study Briefing:** Metrolinx is convening a meeting of senior GTAH municipal planning and transportation leaders. This meeting would be held in Phase II, and provide an opportunity to introduce the study and study plan to senior municipal staff.
- **Technical Working Groups:** Following the initial briefing, municipal staff will be invited to participate in the Technical Working Group process (see below)

Technical (Government and Service Provider) Engagement – As with municipalities, a two-pronged approach is proposed for government and service provider engagement:
- **Electrification Study Briefing:** A briefing session (orientation to the study) is proposed for the following “technical” stakeholders in Phase II:
  - Provincial ministries – MTO, MHLTC, MEI, MOE, MMAH, MF
  - Provincial agencies – OPA, OPG, IO, GO Transit
  - Municipal staff – staff from the GTHA regional governments and/or local municipalities who cannot attend the Municipal Briefing (described above) or who will participate at the request of senior staff following the Municipal Briefing
  - Railways – VIA, CN, CP
  - Federal agencies – TC, Infrastructure Canada
  - Electrical Infrastructure and supply – Toronto Hydro, OPG, Hydro One
  - Other – Union Station, GTAA, Railway Association of Canada
- **Technical Working Groups:** It is envisioned that ad hoc technical working groups and/or one-on-one meetings will be needed between the study team and specific government and service provider stakeholders to discuss and resolve issue-specific technical matters.
- It is also anticipated that select government and service provide stakeholders may participate in the Electrification Stakeholder Working Group process (described above)

4.3 USERS/COMMUTERS

Meetings with GO’s Customer Service Advisory Committee – The proposal is to meet with GO’s existing CSAC (which includes representatives from the 7 GO corridors and customer interests) to brief them on the study and seek feedback. Meetings with the CSAC will likely occur early in the study (Phase II) and late in the study (Phase IV or V), and be arranged to coincide with regularly scheduled CSAC meetings, which are held quarterly.
4.4 GENERAL PUBLIC

Web-based Consultation – Online consultation and/or surveys will be available to the general public through the project website. Online questions/surveys will mirror the technical work being done in each study phase and seek feedback from e-consultation participants:
  o Phase II: Feedback on study approach, objectives and pre-screening criteria
  o Phase III: Feedback on alternative technology options and network scenarios
  o Phase IV: Feedback on short-list of options/scenarios
  o Phase V: Feedback on assessment of short-list and study conclusions

Community Engagement Sessions (to be confirmed) – Near the end of the study (likely Phase IV – short-list of options/scenarios), it is envisioned that one or more community engagement sessions will be convened to enable broader community feedback on electrification options and scenarios. These sessions may take the form of creative technology option demonstrations using models or computer simulations or actual electric train technology, with an opportunity for community feedback. Alternatively, more traditional town hall meetings may be held, likely with visual aids like models or computer simulations. The need for and format of these sessions will be considered once the study team has begun to develop technology options and network scenarios.

Community Panel (to be confirmed) – The Community Panel would involve a recurring survey of up to 1,000 randomly selected and demographically/ethno-culturally reflective residents from throughout the 7 GO corridors.
• The proposal is to survey the panel twice:
  o Survey #1 (Phase II) – objectives, values and screening considerations
  o Survey #2 (Phase IV) – feedback on short-list considerations

Youth Consultation – Elementary and secondary school-based consultations are proposed with youth, as future users of the GO system. It is envisioned that 1 school per GO corridor will be selected to participate in interactive discussions on the study.

4.5 FIRST NATIONS

Relevant First Nations organizations will be sent a notification letter that the study is commencing and (potentially) an offer to meet to discuss the study and their involvement.

5. COMMUNICATIONS TACTICS TO SUPPORT ENGAGEMENT

A substantial education/communications effort is needed to provide clear and accurate information about electrification of rail systems in general and the Metrolinx Electrification Study in particular. Key topics for the study’s communications/education component include:

• The Electrification Study, its scope, process (technical and engagement), timeframe and expected outputs
• The current state of GO’s system
• How electrification has been applied in other countries/rail systems
• What electrification may mean in the context of GO’s system
• Electrification options and scenarios
• How electrification options will be evaluated
• Short-list of options and scenarios
• Study conclusions and next steps

A number of communications tactics and materials are proposed to support the objective to “educate stakeholders about the study process and electrification options, such that they can provide informed feedback during the study.”

• **Study Website** – a “micro” website for the study will be established as part of the overall Metrolinx website. The website will build on the existing GO electrification webpage, provide information about the electrification study and feature an interactive section to enable e-consultation on discussion topics during Phases II – V of the study.

• **One-Window Customer Service Portal** – includes dedicated email address and contact information for use on website and all communications materials; and protocol for receiving, responding to and documenting all study inquiries.

• **Email “Blasts” to Stakeholders/Mailing List** – to publicize the launch of the study, and provide ongoing study updates and information.

• **Updates to Municipal Councillors, MPPs and MPs** – to keep politicians informed about the study process, engagement plans and meetings, and outcomes.

• **Supporting Communications Materials** – to communicate study progress and findings and address electrification issues and options. Materials could be posted on the project website and made available at study consultation meetings (and potentially consultation meetings for other related Metrolinx studies). Options include:
  o Project brochure
  o Frequently asked Q&As
  o Standalone display
  o Project newsletters (circulated via email to project stakeholders and others)
  o Series of “Did You Know” information/fact sheets that can be posted on the website, available at consultation meetings, or distributed by email “blast”. Topics could include:
    • What is the electrification study?
    • What do we mean by electrification?
    • How is electricity used to move trains in other countries?
    • What might electrification mean for GO’s system?
    • What are the options for electrification?
    • How will electrification options be evaluated?
    • What is the short list of electrification options/network scenarios?
    • What are the study conclusions and next steps?
• **Use of social media (to be confirmed)** – The potential to use Twitter and Facebook to publicize the study and engagement opportunities (particularly e-consultation will be explored.

• **Project communications in GO stations/trains (to be confirmed)** – The potential to use GO stations and trains as locations/vehicles to publicize the project and feedback opportunities will be explored, including:
  - Use of pixel signs in stations and on trains
  - Distribution of project brochures at GO stations
6. ENGAGEMENT AND COMMUNICATIONS BY STUDY PHASE

The following charts provide a summary of key stakeholder engagement and communications tactics by study phase:

**Phase I: Setting Tracks for the Study (January)**

**Focus:** Project initiation

**Engagement**
- Develop engagement and communications plan
- Identify and begin recruiting consultation participants
- Establish online consultation mechanisms as part of project website
- Begin preparations for initial canvassing of Community Panel (to be confirmed)
- Develop Terms of Reference for Electrification Study Stakeholder Group and Technical Working Groups
- Establish dates and venues for Phase II consultation meetings

**Communications**
- Begin establishing project website and “one window” customer service portal (dedicated email, etc.)
- Begin developing project communications materials (website copy, brochure, information sheets, etc.)
- Confirm approach to use of social marketing (Twitter, etc.)
- Consider potential use of communications approaches at GO stations and on trains

**Phase II: Today’s Tracks (late January – late March)**

**Focus:** Communicate and obtain feedback on study plan; study objectives; baseline conditions, and pre-screening criteria for technology options

**Engagement**
- Municipal Briefing
- Government and Industry Service Provider Briefing
- Electrification Study Stakeholder Group Meeting #1
- Technical Working Group Meetings (ad hoc)
- Community Panel survey #1 (objectives and values for study – to be confirmed)
- Meeting with CSAC
- Online e-consultation through project website

**Communications**
- Commence communications with external stakeholders – notice of study “commencement” and invitations to stakeholder and working group meetings; First Nations contact letter
- Councillor, MPP, MP information update
- Project website up and running, with one window customer service portal established
- Communication materials prepared and ready for use on website and at stakeholder meetings

**Phase III: Transforming Tracks for the Future (late March – late June)**
Focus: Communicate and obtain feedback on alternative technology options and network scenarios

<table>
<thead>
<tr>
<th>Engagement</th>
<th>Communications</th>
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</thead>
</table>
| • Electrification Study Stakeholder Group Meeting #2 (to be confirmed)  
• Technical Working Group Meetings (ad hoc)  
• Youth consultation through schools  
• Online e-consultation through project website | • Website updates and posting on meeting reports/records from Phase II  
• Meeting notices/invitations  
• Continuing email blasts and circulation/use of materials (display, brochure, information sheets)  
• Councillor, MPP, MP information update |

Phase IV: Setting Tracks for the Future (mid June – mid September)

Focus: Communicate and obtain feedback “short-listed” options/scenarios

<table>
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<tr>
<th>Engagement</th>
<th>Communications</th>
</tr>
</thead>
</table>
| • Electrification Study Stakeholder Group Meeting #3  
• Technical Working Group Meetings (ad hoc)  
• Community Panel #2 (considerations relating to options/scenarios – to be confirmed)  
• Meeting with CSAC  
• Online e-consultation through project website  
• Community Engagement Sessions (to be confirmed) | • Website updates and posting of meeting reports/records from Phase III  
• Meeting notices/invitations  
• Councillor, MPP, MP information update  
• Continuing email blasts and circulation/use of materials (display, brochure, information sheets) |

Phase V: Tracks for the Future (mid October – late December)

Engagement Topics: Communicate and obtain feedback on study conclusions/recommendations

<table>
<thead>
<tr>
<th>Engagement Tactics</th>
<th>Communications</th>
</tr>
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</table>
| • Electrification Study Stakeholder Group Meeting #4  
• Technical Working Group Meetings (ad hoc)  
• Online e-consultation through project website | • Website updates and posting of meeting reports/records from Phase IV  
• Email blasts to stakeholders and public to communicate availability of study conclusions either online or in face-to-face meetings  
• Meeting notices/invitations  
• Councillor, MPP, MP information update  
• Report on stakeholder engagement results |
7. **NEXT STEPS – EARLY IMPLEMENTATION OF THE PLAN**

Following are initial steps to begin implementation of the Stakeholder Engagement and Communications Plan, along with suggested roles and responsibilities:

1. Obtain Metrolinx approval to proceed with plan/implementation [KP].

2. Map out tentative meeting dates/timeframes for Phase I and II meetings and key communications activities [DD, KP, RW].

3. Provide list of other related Metrolinx projects and associated public consultation and communications activities, in order to identify potential synergies with stakeholder engagement and communications for the Electrification Study [VP, KP].

4. Draft initial copy for website [DD, KP/VP/RW review]. Initial copy to include: introduction to study and project team; overview of study scope; study process and engagement opportunities (high level); contact for more information.

5. Develop generic contact points (email address, etc.) for website and communications materials [VP].

6. Identify more specific lists of stakeholders (names of organizations) to be contacted – NGOs, government, industry service providers – and categorize by topic area for purposes of Electrification Study Stakeholder Group [VP, DP, KP, RW].

7. Build database of stakeholder contacts based on #6 above (including contact names, up to date emails, etc.) for all categories of stakeholder to be contacted [VP, KP, DD, RW].

8. Determine need for ad hoc working group meetings/one-on-ones and who these would be with [Roger, Karen].

9. Contact Greg Ashbee to determine Metrolinx approach/protocol for First Nations contact [DD].

10. Determine website needs and capabilities (including: forwarding of input to Lura for “processing”; how to establish interactive e-consultation capability; etc.) [VP, DD].

11. Prepare letters of invitation to various Phase II meetings [DD, KP/RW/VP review].