

METROLINX GEORGETOWN SOUTH UNION PEARSON EXPRESS PROJECT



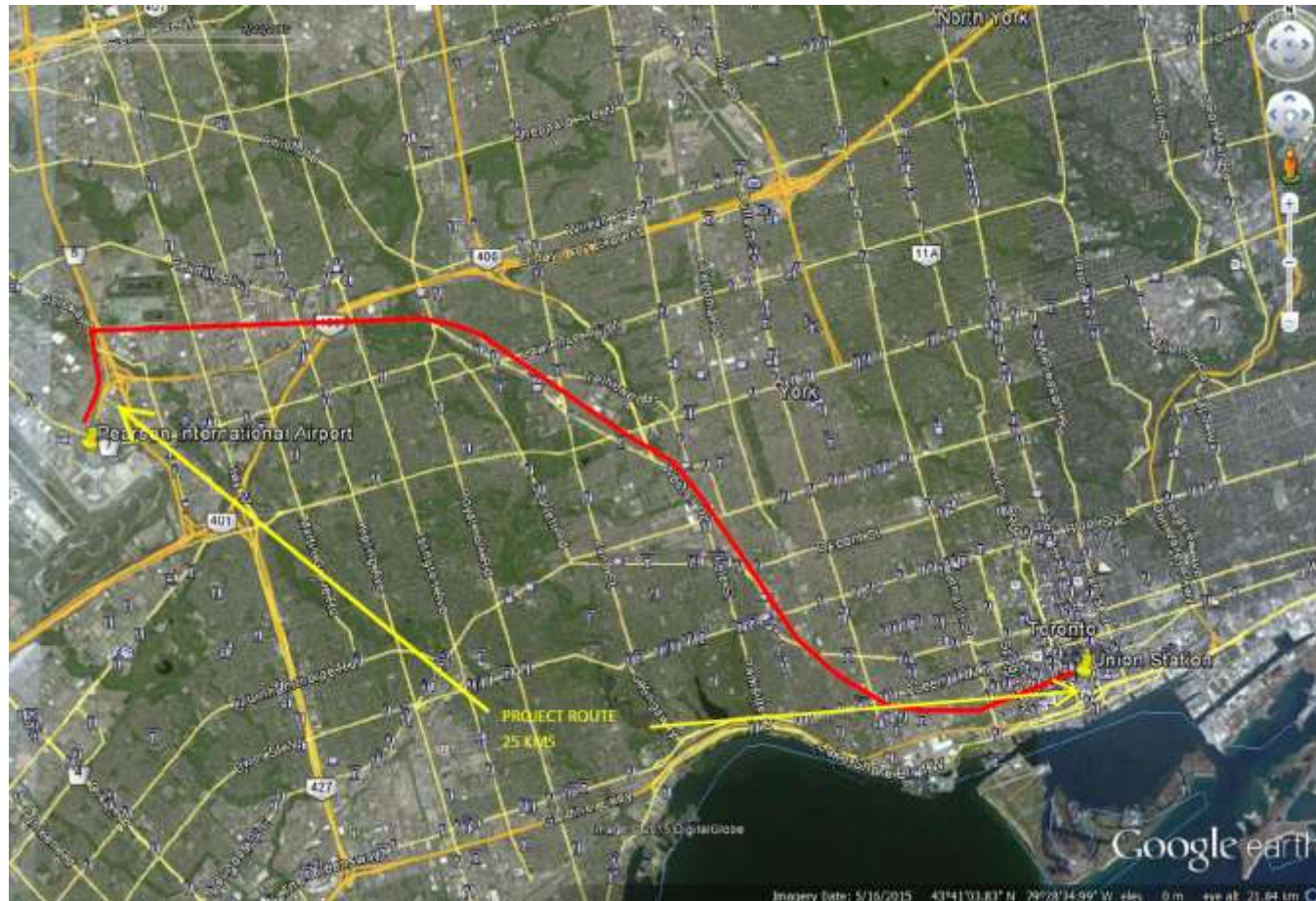
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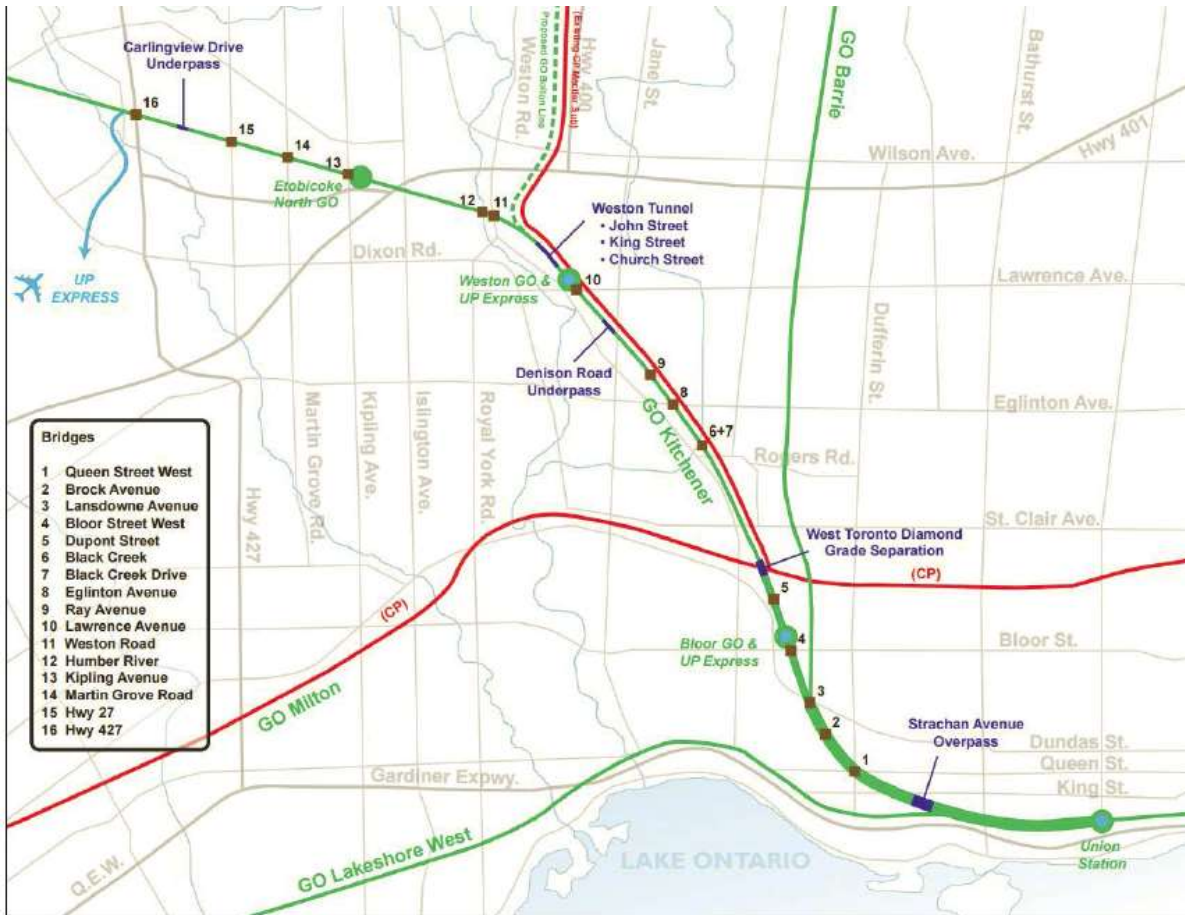
Discussion Components:

1. THE PROJECT
2. ISSUES
3. MOVING FORWARD
4. LESSONS LEARNED

PROJECT ROUTE



CONSTRUCTION OVERVIEW



Quick facts:

- GTS provides infrastructure improvements along GO Transit's existing Kitchener rail corridor
- Total capital cost: \$1.2 billion
- Start: Fall 2010
- Status: Substantially complete
- Final work being done on noise walls, stations/platforms, fencing, and road restorations
- Addition of several tracks along the entire rail corridor (see *Construction overview: Bridges* slide)
- UP Express uses GTS rail corridor from Union Station to Hwy 427 through track sharing
 - Pearson station and spur line from GTS corridor delivered through AFP, separate from GTS financing

GENERAL :

# of Properties:	285 +/-
Private Property:	235
Agency / Municipal:	50 (includes CP and CN)
Total Holding purchases:	34
<ul style="list-style-type: none">• 22 Residences• 1 church• 7 commercial• 4 vacant	

GENERAL RIGHTS REQUIRED

- **Fee simple – full and partial**
- **Easements –**
 - Permanent,
 - Temporary
 - Sub surface – permanent and temporary
 - Leases
 - Licences
 - Permission to Enter and Construct
 - Expropriations
 - Section 30 Agreements (expropriation where no expropriation has taken place- “agree to disagree”)

GENERAL OWNER/SETTLEMENTS

June	2010	41 owners	(8 settled)
October	2011	230 owners	38% settled
January	2012	239 owners	48% settled
May	2012	239 owners	68% settled
December	2012	239 owners	77% settled
November	2013	249 owners	89% settled
March	2014	250 owners	95% settled
January	2015	285-300 owners	95% settled

*** 100% possession**

GENERAL- OTHER

- **Total Real Estate Cost: 10% +/- including resource costs**

Expropriations:

- 3 Phases- 1 in 2012 and 2 in 2013
(a 4th phase to occur shortly)
- Number of Notices of Intent served: 35
- Number of plans registered 15
- Number of Section 30 Agreements 12
- Number of outstanding expropriations 10
(registered but not settled)
- Hearing of Necessity 1
- Board of Negotiations (to date) 2
(anticipate 3 more)

ISSUE 1

- **Time**
 - **FIXED IN SERVICE DATE**
 - **EXPROPRIATION WAS NOT AN OPTION TO MEET CRITICAL DATES**
 - **CONSTRUCTION SCHEDULE**



Weston Tunnel – 2011



Weston Tunnel – January 2015



ISSUE 2

- **RESOURCES**

- **INTERNAL REALTY RESOURCES**

- Management, linear acquisition experience, legal
- Appraisers , negotiators, surveyors, brokers, environmental services, legal services - expropriation
- Procurement Process

ISSUE 3

- Organization structure
 - Metrolinx and GO Transit 2009
- Realty structure
- Project organization and structure
- Internal processes - including expropriation

MOVING FORWARD

CREATE THE TEAM:

- Realty – Internal / External
- Project

Understanding:

- Roles And Responsibilities internal - external
- Who Does What
- Internal Approvals – project versus corporate

MOVING FORWARD

- **Obtain Resources – external**
- **Team with Procurement;**
 - August 2010 – November 1 2010
 - Issued RFP's for 5 disciplines – appraisers, negotiators, brokers, surveyors, environmental specialists
 - Issued 68 contracts for external resources

MOVING FORWARD

REALTY AND PROJECT TEAM;

- Clarify roles and responsibilities – who does what
- Establish how the team will work
 - property request for each requirement (wwwwhh)
 - establish short simple lines of communications
 - bi weekly meetings
 - resolve rub point issues at the earliest opportunity
 - Set construction priorities – by date and project segment

MOVING FORWARD

CREATE A STRATEGY USING THE FOLLOWING ASSUMPTIONS:

1. CHANGING THE INSERVICE DATE WAS NOT AN OPTION
2. EXPROPRIATION IS AN ACQUISITION PROCESS
3. BUSINESS DECISIONS ARE MADE WITH THE BUSINESS UNIT RESPONSIBLE
4. GET THEM ON AND BUILDING
5. TREAT THE PROJECT TEAM AS CUSTOMERS
6. TREAT AFFECTED PROPERTY OWNERS AS CUSTOMERS
7. COMMUNICATION LINKS MUST BE STRONG AND CONTINUALLY MAINTAINED.

MOVING FORWARD

8. CONSISTENT IN APPROACH
9. FAIR TO THE OWNER AND METROLINX
10. “REALTY WILL PARTNER WITH COMMUNITY REALATIONS
(OWNER CONTACT)
11. BUILD A CORPORATE REPUTATION OF FAIRNESS, AND
REASONABLENESS
12. STRATEGY DESIGN WILL BE INCLUSIVE

MOVING FORWARD

TEAM APPROACH TO CREATING THE STRATEGY

- all disciplines involved

NEGOTIATIONS /COMPENSATION STRATEGY

- incentives for early settlement
- strictly adhere to incentive timelines
- owners to receive expropriation entitlements
- maintain consistency of approach
- residential buyouts – home for a home

MOVING FORWARD

- Create an expropriation process – internal / external
- utilize expropriation for time, title issues or when no resolution available
- utilize section 30's where there is a benefit to Metrolinx
- continue to negotiate after expropriation until no opportunity to resolve
- pre-approve transactions
- maintain strong communications / education– all directions
- Maintain corporation reputation for consistency and fairness

LESSONS LEARNED

- Integrate realty into the project from inception to completion
- Understand project issues
- Pay attention to DETAILS, SCHEDULES
- Time frames are not what you think
- Understand the cost of the process, ask yourself

“Is it worth it?”

LESSONS LEARNED

- **Settle as many negotiations as possible amicably**
- **Always be aware of the implications of what you do**
- **Be mindful of the owner (forced taking)**
- **Make it a process, not a hammer**
- ***Only draw a line in the sand if you are prepared to not cross it***
- ***Communicate, educate, share***

IMPORTANCE OF THESE LESSONS

Metrolinx will, over the next 10 years, implement “R E R – Regional Express Rail:

- Increase rail service on all 7 rail corridors to all day, 2-way service
- In some cases, service will be every 15 minutes
- Where necessary, double track the rail corridor
- Electrify all rail corridors
- This means, the potential for 7 GTS type projects
- Projected cost; - \$13 billion

REFERENCE MATERIAL



SUCCESSFUL PROJECT DELIVERY

Integrating right of way from project inception to completion

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TRANSIT PROJECTS

A Right of Way Case Study

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QUESTIONS / DISCUSSION

Thank you