

ITEM  
209**Local Calling Area (LCA) Expansion**ITEM  
209.1**Service Description**

Local Calling Area (LCA) Expansion provides for the terms and conditions, and processes, associated with government requests to create, or expand, a Company telephone free local calling area for specific telephone exchanges (the expanded LCA). LCA Expansion requests are initiated and presented to the Company, based on a motion passed, by the appropriate local, municipal or regional government(s) representing the communities in question (the Requesting Government(s)).

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LCA Expansion, as provided for in this Item, applies in cases where the traditional Extended Area Service (EAS) criteria are not applied.

**Definitions**

For the purposes of this Tariff item:

“*Local Competitors*” mean competitive local exchange carriers (CLECs).

“*Toll Competitors*” or “*Long-distance Telephone Competitors*” exclude both resellers of local telephone services and of extended local calling services.

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209.2**Conditions of Service**

1. General principles and criteria for LCA Expansion:
  - a. Evidence of community-of-interest requirement – A motion passed by the governing councils from the Requesting Government(s) is evidence of the community of interest;
  - b. Distance requirement – distance criterion does not apply;
  - c. Compensation for foregone toll revenues requirement –
    - i. The Company may apply a monthly LCA Expansion surcharge to be paid by subscribers within the expanded LCA for a period of three (3) years;
    - ii. The LCA Expansion surcharge is to compensate the Company and affected Long-distance Telephone Competitors for foregone toll revenues as a result of the expanded LCA;

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- iii. Competitive local exchange carriers (CLECs) in the Company expanded LCA will be deemed to have collected from their respective subscribers in the expanded LCA the same monthly LCA Expansion surcharge per NAS line as approved for the Company (except those CLECs which had already opted out of the LCA Expansion process per condition Item 209.2.1.c.v below); (NAS – see note § in Item 209.2.4.a.ii) and
  - iv. Resellers of local telephone services are not Toll Competitors and are, therefore, not eligible to receive compensation for forgone toll revenue as a result of any expanded LCA.
  - v. A CLEC may, on a one-time basis, opt out of the LCA Expansion process in accordance with Telecom Decision CRTC 2003-28 (paragraphs 37 to 39 and 42).
- d. Plebiscite requirement –
- i. All residential subscribers whose residential telephone individual line rate, including the LCA Expansion monthly surcharge, would increase by more than \$1.00 per month as a result of the proposed expansion of the LCA must have the opportunity to vote on the LCA Expansion proposal (the LCA Plebiscite);
  - ii. A simple majority (i.e., 50% plus one vote) of respondents of the LCA Plebiscite must vote in favour of the proposal before it may be implemented;
  - iii. The cost of the LCA Plebiscites will be paid by the Requesting Government(s) per Item 209.2.6, regardless of the outcome of the LCA Plebiscites; and
  - iv. The LCA Plebiscite shall be conducted by a third-party pollster (selected per Item 209.2.5) for all residential subscribers affected by a LCA Expansion proposal, including the subscribers of the Company's Local Competitors which had not opted out of the LCA Expansion process, in accordance with the plebiscite process as specified in Item 209.2.7 and the content as specified in Item 209.2.8.

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2. The proposal process for creating or expanding a Company LCA is outlined as follows: F
- a. The appropriate Requesting Government(s) representing the communities in question passes a motion to create an expanded LCA and presents this to the Company as evidence to meet the LCA Expansion community-of-interest requirement; (Note: In circumstances where more than one local government is involved in a request to initiate a LCA Expansion economic study, all local governments involved should consult each other and pass motions requesting that an economic study be performed by the Company.) |
  - b. The Company performs a study to determine the amount of foregone toll revenues for the Company and Toll Competitors, as well as the associated monthly LCA Expansion surcharge to be paid by all local subscribers within the expanded LCA for the total foregone toll revenues; |
  - c. As part of the Company study preparation process, the Company shall collect information from its competitors as specified in Item 209.2.4. The Company shall also provide to the Requesting Government(s) an estimate of the cost of performing any required LCA Plebiscite (see Item 209.2.6); |
  - d. The Requesting Government(s) shall decide and notify the Company in writing, based on the Company study, whether to proceed or not; |
  - e. If the Requesting Government(s) decides to proceed with its requests, the Company shall file an application with the CRTC seeking approval of the LCA Expansion proposal, including the proposed monthly LCA Expansion surcharge (Items 209.2.2.b). The estimated cost of the LCA Plebiscite (Item 209.2.2.c) will also be provided in the application for CRTC information. Interested parties would have the opportunity to comment per directives issued by the CRTC; |
  - f. As part of the LCA Expansion application and if applicable, the Company shall prepare an economic study detailing its net incremental operating costs associated with the LCA Expansion in question; and propose an exogenous adjustment of local rates in order to permit recovery of any material net increase in operating costs; |
  - g. If the LCA Expansion application is approved by the CRTC, the Requesting Government(s) will be notified by the Company within thirty (30) days of the CRTC approval. All required plebiscites shall be conducted by a third-party pollster appointed by the Company, and paid for by the Requesting Government(s) per Item 209.2.6. |

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3. The Company shall notify the Requesting Government(s) of the time the Company requires to perform the Company economic study on a case-by-case basis, dependent on the complexity and the communities involved. F |
4. Process for the Company to collect information from competitors to prepare the Company's cost quotation for the Requesting Governments(s): |
  - a. The Company's Carrier Services Group (CSG) shall be responsible for the following: |
    - i. Notify all the Company's Toll Competitors, and Local Competitors which have not opted out of the LCA Expansion process in the affected telephone exchanges (per Item 209.2.1.c.v), to gather the necessary information for their foregone toll revenues generated during the year prior to the request from Requesting Government(s), including the estimated amount (and calculation) of compensation that each Toll Competitor expects it would be eligible to receive. The Toll Competitors shall provide the Company's CSG with the requested information no later than the deadline provided for in Item 209.2.4.c below. |
    - ii. Gather the current local network access service (NAS) line counts from all Local Competitors, which have not opted out of the LCA Expansion process in the affected telephone exchanges (per Item 209.2.1.c.v). The Local Competitors shall provide the Company's CSG with the requested information no later than the deadline provided for in Item 209.2.4.c below. (NAS: see note § below.) |

Note §: NAS lines to which LCA Expansion surcharges are applicable include: Each residential and business local telephone service line, or each channel of a service that has public switched telephone network (PSTN) connection. Where a service has multiple local channels connected to the PSTN (e.g., ISDN services), one LCA Expansion surcharge will be applied to each active line or channel that has PSTN connection.

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the Company's and affected competitors' local access services to which LCA Expansion surcharges will apply include: F

1. Residence telephone service lines (all classifications or types);
2. Business telephone service lines (all classifications or types; contract or non-contract);
3. Centrex Service lines (all classifications or types; contract or non-contract);
4. ISDN-based services (including ISP Connection Service in B.C.); and
5. Any other PSTN-connected services.

- b. The Company CSG's notification for information from the affected competitors shall include:
  - i. Purpose of the proposed telephone free local calling area expansion changes, including the list of telephone exchanges affected by the LCA Expansion requested and a listing of the existing local and long distance calling routes affected;
  - ii. Map or schematic drawing of subscribers' current local calling area(s) and the areas to be included in the LCA Expansion proposal; and
  - iii. Deadline of Company CSG receiving the information requested (as provided for in Item 209.2.4.c below).
- c. The Company shall provide competitors with sixty (60) days to supply the requested information to the Company CSG in a format per the Company CSG's notification.
- d. In the event a Company competitor expects to require more time than that provided for in Item 209.2.4.c, the competitor shall advise the Company's CSG in writing as soon as practical prior to the Company deadline, with explanations and an alternate deadline, in order that the Company may advise or consult the Requesting Government(s) as necessary.

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5. For LCA Expansion proposals that require a LCA Plebiscite, the plebiscite shall be conducted by a third-party pollster appointed by the Company. The Company selects the third-party pollster through a bidding process, based on a pollster's reputation for unbiased objectivity, experience in conducting similar plebiscites and cost considerations. F
6. Costs of the LCA Plebiscite to be paid by the Requesting Government(s):
  - a. An estimated cost, based on a range of the anticipated numbers of residential subscribers (on a case-by-case basis and dependent on the size and complexity of a specific LCA Expansion), will be provided to the Requesting Government(s) as part of the study specified in Item 209.2.2.b, subject to:
    - i. Ballots for the LCA Plebiscites will only be issued to local telephone residential subscribers after CRTC approval of the Company LCA Expansion application; and
    - ii. Billing of the final cost of the LCA Plebiscites shall be calculated and adjusted based on the actual total number of ballots sent to local residential subscribers.
  - b. Requesting Government(s) shall pay the Company for the actual LCA Plebiscite cost as follows:
    - i. fifty percent (50%) within thirty (30) days of CRTC approval of the LCA Expansion application; and
    - ii. with the remainder of the final cost adjustments (as provided for in Item 209.2.6.a.ii, if applicable) due in full within thirty (30) days of the LCA Plebiscite ballots being issued to the local residential subscribers.
7. Process for LCA Plebiscite upon approval from the CRTC to move forward with a LCA Expansion that requires a LCA Plebiscite:
  - a. The Company shall notify all affected Local Competitors in writing within thirty (30) days of CRTC approval of the Company's LCA Expansion application, requesting subscriber information required for sending the LCA Plebiscite to competitors' residential subscribers for their votes;

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- b. The Company's written requests to Local Competitors shall include the following information: F
  - i. References of the Company LCA Expansion application (e.g., the Tariff Notice number or letter reference, as applicable) and the CRTC approval; |
  - ii. List of telephone exchanges included in the LCA Expansion;
  - iii. Details of the third-party pollster implementing the LCA Plebiscite (i.e., the third-party pollster appointed based on Item 209.2.5) for competitors to supply information pursuant to Item 209.2.7.c; and
  - iv. The common format in which all competitors are to provide the subscriber information requested.
- c. The Company shall request competitors to supply information to the third-party pollster. |
- d. The Company shall provide the list of the Company's own residential subscribers to the third-party pollster within thirty (30) days of CRTC approval of the Company LCA Expansion application. |
- e. Competitors shall have thirty (30) days, from the date of the Company's notification to the competitors of CRTC approval of the LCA Expansion application, to provide to the third-party pollster the list of names and addresses of their respective residential subscribers affected by the pending LCA Expansion for the purpose of dispatching the LCA Plebiscite for voting. |
- f. The third-party pollster shall merge all residential subscriber lists from the Company and its Local Competitors and remove duplications consistent with the manner in which ballots are issued per specified in Item 209.2.9. |
- g. Upon receiving residential subscriber lists from the Company and competitors, the third-party pollster shall have sixty (60) days to issue the LCA Plebiscites. |

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- h. In the event that any subscriber lists are not received by the third-party pollster upon the specified Company deadline, the third-party pollster must issue the LCA Plebiscites, by regular postal mail, within one hundred and twenty (120) days of CRTC approval to those residential subscriber lists received by the specified Company deadline. F
  - i. Content and response deadline of the LCA Plebiscite shall be as specified in Item 209.2.8.
  - j. The third-party pollster shall provide the Company and all affected Local Competitors with a sample copy of the actual LCA Plebiscite for reference fourteen (14) days prior to the mailing date of the ballots. |
  - k. The third-party pollster shall generally provide ballot results of the LCA Plebiscites to the Company within thirty (30) days following the deadline specified for returned ballots. Public announcement of the plebiscite results is the sole responsibility of the Requesting Government(s). |
  - l. The Company shall notify the CRTC, the Requesting Government(s) and all affected Local Competitors and Toll Competitors, of the LCA Plebiscite results within thirty (30) days of the receipt of results from the third-party pollster, as well as the target date of implementing the approved expanded LCA and the effective date of the approved monthly LCA Expansion surcharge. |
8. The LCA Plebiscite ballot shall include:
- a. Purpose of the plebiscite and the telephone free local calling area expansion changes, including the list of telephone exchanges affected by the LCA Expansion application, per CRTC approval;
  - b. Map or schematic drawing of the areas included in the LCA Expansion application approved by the CRTC and a description of the residential subscribers' current local calling area(s);
  - c. The monthly LCA Expansion surcharge approved by the CRTC that residential subscribers will be billed for the approved LCA Expansion, pending implementation, for a period of three (3) years;
  - d. Input fields for subscribers to approve the LCA Expansion by voting "yes" or to oppose the LCA Expansion by voting "no";

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- e. Details of voting instructions and methods for submitting votes to the third-party pollster, including any alternative voting methods that the third-party pollster may provide to the voting subscribers (such as voicemail response or Internet-based voting);
  - f. Last date that the third-party pollster will accept votes to be counted (being thirty-five (35) days after the date that the last residential subscriber in the expanded LCA is deemed to have received the LCA Plebiscite);
  - g. Other information (e.g., contacts and locations for more information, additional or missing ballot forms, etc.);
  - h. One (1) pre-addressed and postage-paid envelop per ballot form for returning the vote to the third-party pollster; and
  - i. A warning message that the pollster will audit voting results to ensure that only one vote can be submitted for each ballot that is issued (see Item 209.10.a.vi).
9. Issuance of LCA Plebiscite ballots to subscribers:
- a. Each residential subscriber who subscribes to the local telephone service of either the Company or a CLEC that has not opted out of the LCA Expansion process and is located in a designated voting telephone exchange is entitled to one (1) vote per service address in the LCA Plebiscite, regardless of the number of residential individual telephone lines to which that subscriber subscribes to;
  - b. If subscriber records show a different billing surname or first initial(s) at the same service address for a specific residential telephone line, an additional ballot(s) will be issued for each such subscriber at the service address;
  - c. Where the billing surname, first initial(s) and service address for service addresses with multiple telephone lines are identical, only one (1) LCA Plebiscite ballot will be issued;
  - d. In the event that a situation such as J. Doe being a different Company subscriber than Jane Doe arises, both Company subscribers are entitled to vote in the LCA Plebiscite. However, the second LCA Plebiscite ballot will only be sent at the request of either subscriber;

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- e. Residential subscribers relocating from a non-voting to a designated voting telephone exchange during the voting period specified for each LCA Plebiscite are eligible to vote in the LCA Plebiscite. A LCA Plebiscite ballot will be sent only at the request of such a subscriber; and
- f. Issuance of LCA Plebiscite ballots to residential subscribers of the Company's Local Competitors shall be consistent with the treatment of the Company's own subscribers, as specified in Item 209.2.9.

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## 10. Counting and validating returned ballots for LCA Plebiscite:

- a. Returned LCA Plebiscite ballots must include the following in order to be deemed valid:
  - i. The subscriber's telephone number and full service address;
  - ii. The subscriber's first name or initial(s) and full last name;
  - iii. The subscriber's signature (or the personal identification number – PIN – issued to the voting subscriber for alternative voting methods using electronic means);
  - iv. A clear indication of the choice the subscriber votes for;
  - v. Must be received no later than the close of business on the deadline date (and at the return address) identified in the LCA Plebiscite ballot; and
  - vi. In the event the third-party pollster provides for more than one means of returning a ballot (e.g., online polling through Internet, as opposed to postal mail) and a subscriber voted more than once for a single eligible ballot, the first valid vote received from such a subscriber shall be the only vote counted as valid. The same rule applies to redundant votes returned using the same means.
- b. Votes delivered to an address other than the one specified in the LCA Plebiscite for the return of votes to be counted shall be deemed lost and void.

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- c. A returned LCA Plebiscite ballot shall be deemed spoiled and void when:
  - i. It omits any one or more of the input fields specified in Item 209.2.10.a.i to iv;
  - ii. The wording of the ballot has been altered by the voting subscriber to change its meaning in any way; or
  - iii. The ballot has been marked in such a manner that it is not clear which choice the subscriber votes for.
- d. A returned LCA Plebiscite ballot shall be deemed invalid when:
  - i. The subscriber completing the ballot is located in any telephone exchange other than one of the designated voting telephone exchange, except as provided for otherwise in Item 209.2.9.e;
  - ii. The ballot is received by the third-party pollster after the closing deadline provided for in Item 209.2.10.a.v;
  - iii. The ballot is not the first ballot cast by the same subscriber; or
  - iv. The ballot is a reproduction or photocopy of the original ballot.
- e. Counting and validating of LCA Plebiscite ballots returned by residential subscribers of the Company's Local Competitors shall be consistent with the treatment of the Company's own subscribers, as specified in Item 209.2.10.

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209.3 **Rates**

The Customer shall pay to the Company the following rates and charges for the LCA Expansion surcharge and is subject to all applicable terms and conditions of the Company's Tariffs. Such surcharges are in addition to any other rates and charges that may be applicable.

Exchange	Monthly LCA Expansion Surcharge (per line*)			Compensation Period**	
	Residence	Centrex	Business	Start Date	End Date
Clear Hills County, AB: <ul style="list-style-type: none"> <li>• Bear Canyon;</li> <li>• Fairview;</li> <li>• Hines Creek;</li> <li>• Whitelaw; and</li> <li>• Worsley.</li> </ul>	\$0.45 §	\$0.04 §	\$0.11 §	2008 12 11 §	2011 12 10 §
Nanaimo Regional District <ul style="list-style-type: none"> <li>• Bowser</li> </ul> Comox Valley Regional District <ul style="list-style-type: none"> <li>• Union Bay</li> </ul>	\$0.25 β	\$0.12 β	\$0.37 β	2011 03 08 β	2014 03 07 β

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\* Applicable per local network access line (NAS) types listed in Note § under Item 209.2.4.a.

\*\* 3 years per Telecom Decision CRTC 2003-27 (paragraph 45).

§ Customers shall receive free local calling for the Clear Hills County LCA Expansion effective 2008 04 09. However, the monthly LCA Expansion surcharge for a consecutive thirty-six (36) months compensation period and the actual billing shall be effected on 2008 12 11 as follows:

- Residence LCA: \$5.40 per year (i.e., \$0.45 per month x 12 months), once a year for the 3-year compensation period.
- Centrex LCA: \$1.44 in a single payment (i.e., \$0.04 per month x 36 month) for the 3-year compensation period.
- Business LCA: \$3.96 in a single payment (i.e., \$0.11 per month x 36 month) for the 3-year compensation period.

