

**Deloitte.**



**COVID-19**

**The road to recovery  
for municipalities**



# Introduction

The Canadian economy is in the deepest recession since the Great Depression and the fallout will be felt across all regions. However, with the gradual reopening of the economy, it looks like the peak contraction was experienced in April. Economic data for May and June is showing that growth has restarted, but there is every reason to believe that this will be a slow, gradual recovery.

Indeed, given that the health risks will remain until a vaccine is deployed, economic activity is not expected to return to pre-COVID-19 levels until at least the first half of 2022.

While we tend to think in terms of "the Canadian economy" or "provincial economies", one could argue that Canada is really composed of a few dozen major urban economies spread across a wide geography. Seventy-two percent of Canadians live in urban-areas.<sup>1</sup> These municipalities (including cities, lower, and upper-tier municipalities) are responsible for about 60 percent of public infrastructure in Canada, many essential and non-essential services, the delivery of social programs, and many of the by-laws that shape the environment in which our local communities and economies operate.<sup>2</sup> As such, the current Canadian recession is really the story of many economic contractions across cities. Municipal leaders will be in the front line of responding to the downturn and helping to navigate the gradual reopening of our communities and fostering the economic recovery, while promoting public health and safety.

Municipalities have been devastated financially by this public health crisis; the loss of revenue from transit and other user fees,<sup>3</sup> and increased costs from public health measures (including staffing, cleaning, and housing for vulnerable people), pushing many to the brink of their financial capacity. The Federation of Canadian Municipalities estimates that municipalities will see a large budgetary shortfall in 2020, ranging from \$35 million to \$1.7 billion among large municipalities.<sup>4</sup> This impact will be made more acute by the fact that most municipalities are currently obliged in legislation to absorb an operating deficit in their following year's budget.

The COVID-19 crisis has also driven municipalities to challenge orthodoxies around what is possible in terms of service delivery, agile operations, and cross-functional collaboration, as teams have responded to the crisis and sought to protect the most vulnerable.

**Municipal leaders have been focused on responding to COVID-19, the first of three timeframes—Respond, Recover, Thrive:**





## Phase 2: Recover

The **response phase**, the subject of our previous paper titled, *COVID-19: How municipalities can respond, recover, and thrive in the pandemic era* is characterized by:

- Implementing robust crisis management programs, public health safeguards, and community support for the most vulnerable.
- Establishing integrated operating models and flexible resourcing to redeploy skills where needed and keep operations running sustainably.
- Managing continuity of services and essential operations.

In this paper, we provide context, guidance and advice to municipal leaders as they pivot to **recovery** and begin to lead the transition to rebuilding over many years. The timing of and planning for recovery and rebuilding will be different for municipalities in different parts of the country, depending on how the pandemic has played out in their particular regions. The intention of this paper is to highlight five interrelated pillars that all leaders should consider as they navigate beyond reopening and into longer-term recovery:

### **Lead local economic recovery to drive provincial and national economies:**

City leaders have a core role to play in rebuilding and renewing economic growth, creating opportunities for those living and working across their region.

### **Establish smart health communities:**

The leadership shown by municipalities through the implementation of physical distancing policies and other public health measure, as well as the increased responsibility of the individual to contribute to their own well-being and that of their community, will accelerate a movement to community-based health models enabled through digital access.

### **Incorporate resilience into recovery planning and execution:**

Building resilience for **recovery** and future crises may also renew focus on building broader municipal resilience to protect vulnerable populations and prepare for other natural and economic disruptions.

### **Reimagine the relationship with people through digitization and data:**

A longer-term shift in how municipalities engage with people and businesses will be accelerated as common customer needs—including clear, real-time, often digital access to information and support—are amplified through recovery.

### **Enable a secure and inclusive recovery:**

Throughout **recovery**, data privacy and cybersecurity safeguards will be more critical than ever as our municipalities go digital—understanding how to enhance trust across all populations and lay the groundwork for a safe, appropriate, and secure way to rebuild.

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Municipalities will need coordinated, people-centred approaches to build the right foundations for a resilient future where residents and businesses thrive. Leaders will need to identify tangible ways to rebuild trust across all their stakeholders—citizens, employees, other levels of government—to enable effective reopening and forward momentum. There will be tough choices and trade-offs as municipalities challenge the conventional way of doing things and adopt agile approaches to work and engage more nimbly. It is time to scale and accelerate modernization priorities, to re-evaluate relationships with other levels of government, private and community sector partners, and, critically, to reimagine the relationship between municipalities and the people that live in them.



## Lead local economic recovery to drive provincial and national economies

As the national and regional economies recover, governments of all levels will want to deploy stimulus to accelerate growth. The main challenge for municipalities is a lack of funds. Municipal leaders will need to engage constructively with their provincial and federal counterparts to seek additional financing in order to deliver on municipal responsibilities. Even so, municipalities are likely to continue to have inadequate funding. Municipal leaders will need to make difficult decisions on how to prioritize their limited resources.

When it comes to federal and provincial stimulus, municipal leaders can play an important role in helping to identify the right stimulus and aid in its deployment. For example, the federal and provincial governments may want to invest more in infrastructure during the recovery, as this type of investment has the highest economic multiplier in terms of boosting growth—it is more impactful than tax cuts or increased spending. However, municipalities understand their local economies and communities and know which projects should be a priority. Municipal leaders can also provide considerable intelligence on the state of their local businesses and the path the recovery is taking, helping other levels of government to make informed decisions.

Given fiscal constraints, municipal leaders also need to think about available options to help stimulate growth that comes with little-to-no price tag. Consider changes to municipal regulations that might be restricting economic activity. Canada's regulatory environment is its single greatest competitiveness challenge<sup>5</sup> and many of the regulatory barriers are at the municipal level. For example, in one of Canada's major urban centres it takes 249 days to get a permit to build a warehouse, that's 168 more days than in the United States. Canada ranked 64th in the world in terms of the time to get construction permits, and these are often affected by municipal requirements. In some cases, regulatory reform requires rewriting the rules to allow more economic activity to happen but in many cases it is about reducing the time and compliance burden of regulations.

In addition to helping local businesses to thrive, municipal leaders need to think creatively about what can be done to foster startups. Small businesses are the job creation engine of the economy—and many are likely to fail. Making it attractive or easier to launch new businesses during the recovery will not only accelerate economic growth, it will also facilitate a strong labour market recovery.

It should be stressed that the municipal policy changes are not just about the recovery, but also how our urban centres position themselves to thrive long term. There is an opportunity now to renegotiate fiscal capacity across levels of government and improve Canadian competitiveness for future prosperity.





## Establish smart health communities

The COVID-19 pandemic has challenged assumptions about peoples' attitudes and behaviors towards health care over the course of just a few months. Virtual care, digital engagement, personalized health, and wellness tools are being adopted globally at unprecedented rates. These innovations are already beginning to show positive impacts on health service delivery and demonstrate, most notably, that providers can meet people where they are. As services begin to ramp up, moving towards recovery involves understanding how to operate in this new normal and support people in a manner that builds reliability and trust.

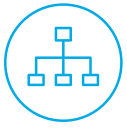
In April—during the peak of the COVID-19 crisis—Deloitte surveyed 1,159 health care consumers to understand the emotional toll of the pandemic. Eighty-two percent of consumers said they were experiencing anxiety or fear, 77 percent felt uncertainty or a lack of control, and 75 percent felt loneliness or a sense of isolation. Municipalities launching into recovery will require strategies that extend beyond the traditional health care system, empowering people in management of their health and well-being, and leveraging the new channels that are being adopted rapidly.

Establishing smart health communities could not only prove an innovative way help people recover, but to ultimately thrive. Smart health communities leverage digital technologies and data to create social connectedness and support communities of people with similar health goals. Further, harnessing the power of

non-traditional players such as retailers and business leaders in supporting these communities is essential. The more communities can activate these ecosystems around the goal of improving health, the more effective we will be in transforming the clinically focused health system that existed before COVID-19.

Cities can play an integral role in spurring the creation and growth of smart health communities, in particular, for those that have been disproportionately impacted by the pandemic. These include seniors, individuals with pre-existing conditions, and those living in lower income neighbourhoods. Doing so would require investment in smart infrastructure that enables more personalized citizen engagement and creates greater connectivity with citizens through various programs and access points. Then the establishment of more efficient means of collecting and integrating the right data, both clinical and non-clinical (i.e. social determinants of health). Finally, cities must find a way to better incentivize cross-sectoral collaborations between public and private players aimed at improving population health and well-being.





# Incorporate resilience into recovery planning and execution

The vibrant connectedness and convenient proximities that have attracted thousands of people to municipalities became their vulnerabilities during the crisis. Navigating COVID-19 has surfaced critical lessons for municipalities:

- **Inequality means vulnerability**
- **Prevention is less costly**
- **Collective action is more effective**

Physical or social distancing was adopted as a policy by governments once the early evidence showed crowds to be significant vectors for COVID-19 transmission. The true cost of these measures will not be known for months or even years to come. However, inequities in access to shelter and health care have placed certain groups at a higher risk than others, irrespective of density. There is significant evidence showing that people in low-income neighbourhoods are at higher risk of contracting and dying from COVID-19.<sup>6</sup> The pandemic has exposed how many municipalities' existing vulnerabilities such as homelessness and unequal access to health care are deepened during crises. Disaster relief and recovery strategies to build back the collective resilience of the city—whether it be against another pandemic or a natural disaster—will be only as effective as a city's ability to identify, assess, and address the needs of its vulnerable groups.

COVID-19 has also revealed how norms around what is 'business as usual' can change overnight. This unique opportunity to rethink 'business as usual' opens the door to a consideration of other significant risks of disruption. As climate change leads to more extreme weather events and more frequent natural disasters, recovery from COVID-19 needs to have a heavier emphasis on forward-looking preparation than on restoring the past. As early, decisive responses to the pandemic eased the strain on the city's hospitals, supplies, and care providers, a proactive

and preventative framework of action can help mitigate future disasters. Amsterdam recently announced its City Doughnut model, representing how municipalities must balance meeting the basic needs of its residents while remaining within environment boundaries (e.g., a given level of air pollution, ozone layer depletion, excessive land use, etc.) Municipalities rebuilding from COVID-19 might consider their own Doughnut model to illustrate where needs are not being met or limits are being breached. In this model, economic activity can improve the well-being of residents (in terms of housing, health, and food security), as well as long-term climate resilience.<sup>7</sup>

Lastly, municipalities can direct collective action to flatten other curves. Economic stimulus that involves city-wide emissions reduction will pave the way to a low-carbon recovery. Green financial relief can present opportunities for municipalities to increase the climate resilience of their buildings and transportation—the two largest sources of emissions for most municipalities in Canada. For example, advancing public transport expansion projects and the electrification of private passenger and freight transport can create jobs and reduce congestion and air pollution. Programs across many global cities (including Boston, Bogota, Toronto, and so on) to close streets to cars or reduce the space available to cars (to accommodate physical distancing guidelines and allow more room for pedestrians and cyclists) might be expanded to support further opportunities and investment.<sup>8</sup> Investment in green retrofits for Canada's aging buildings can bring down energy consumption costs and decarbonize millions of homes, workplaces, and community spaces.



# Reimagine the relationship with people through digitization and data

Deloitte's in-depth research with people and businesses has revealed there are commonalities in needs and wants when it comes to interacting with municipal services. The current pandemic has only amplified these expectations. Municipalities now face choices on how to reimagine municipal service delivery in ways that many may have resisted in the past.

People want to know where to start in the service journey and want help right away. With many paths to accessing municipal services—including online, over the phone, in-person—customers are sometimes confused and experience inconsistencies. COVID-19 has forced greater adoption of digital channels for service access due to the closure of in-person counters and the inconvenience caused by long phone wait times. This has put an additional burden on those channels to provide a quick and easy experience.

Customers want municipalities to hear them, support them throughout their journey, and remember them. City staff have struggled to do this with legacy systems and technology, manual processes, and a lack of reliable data. COVID-19 has prompted new ways of virtually contacting customers (especially vulnerable populations, including seniors), gathering real-time information on critical needs and prioritizing ways to serve them better. COVID-19 has also accelerated the enablement of new ways for city staff to serve customers both virtually and remotely. Clear sources of information and responsive virtual channels for individuals, businesses, and staff to access city services will be a core focus for municipalities in recovery over the coming months. Key steps for all cities must include:

- **Relentless system rationalization to review and remove all systems that are aging and expensive.**
- **Full remote worker enablement, with a focus on deploying systems and solutions that truly empower the workforce to support service delivery anywhere.**
- **Development of an enabling platform strategy that would select a limited number of foundational platforms which provide agility and 'consumer-like' experience. These would become default solutions for all programs and services and support the above steps.**

- **Focus on gathering and applying accurate data to drive decision-making on services, programs, and performance. This requires investment in centres of excellence in data, information management, automation, analytics, machine learning, and other AI technology.**

Finally, customers want to be part of making municipalities better. Municipalities have had uneven success engaging with people and private sector organizations who want to contribute ideas, time, money, and resources to help those most in need. The devastating financial hardship and staffing shortages stemming from COVID-19 have left municipalities no choice but to relax constraints and welcome support from the community at large to supplement service and resource gaps. A digital approach may provide municipalities a more direct and powerful way to build actionable, enduring, and human-centric relationships with customers.

As an example, Copenhagen is a leader in digital service modernization. They have developed customer-centric online portals to reach key segments of their diverse population (e.g. newcomers, visitors). They are also pioneering digital tools such as crowdsourcing public hearings and deploying a chatbot (Sofie) to help their residents navigate city services. Collectively, they are communicating in a way that is focused on their customers' needs and establishing two-way channels that fit their preferences. As Denmark gradually reopens—it was one of the first European states to start doing so—this ability to connect with the population in quick, responsive ways will be critical to continued success.

Municipalities will face some tough questions and uncomfortable tradeoffs when it comes to recalibrating the efficiency, effectiveness, and inclusiveness of customer service in a post-pandemic environment. Recovery will involve a dramatic cultural mindset shift, and significant technology modernization to challenge the traditional way of doing things—this will not be easy.





## Enable a secure and inclusive recovery

Privacy and cybersecurity are more critical than ever as our municipalities go digital and require the use of data to respond, evaluate, and plan for reopening and recovery. Recovery planning gives us an opportunity to evaluate previous and response related activities, developing and designing new platforms to scale good practices. Now is the time to redesign a secure, people-oriented, community-driven, more inclusive, and privacy-aware digital city ecosystem.

The Office of the Privacy Commissioner of Canada recently outlined a [Framework](#) with nine privacy principles of particular importance in light of COVID-19 measures impacting the privacy of Canadians. All are relevant to recovery planning across Canada, with a few standing out as pillars to municipalities' recovery.

### **Openness and transparency (Principle 6) - Provide clear and detailed information to Canadians about new and emerging measures, on an ongoing basis.**

Trust is paramount to the reopening of municipalities and the businesses and services within them. Building and maintaining people's trust will require an inclusive and transparent buy-in process—one that allows for continuous transparency around the collection and use of data for new and emerging recovery measures, ensuring they are necessary and proportional (Principle 2) to their objectives.

A recent example of innovative transparency has been used in Amsterdam, which created a disclosure document called the "[Tada-data disclosed](#)" manifesto for responsible digital municipalities. This document lays out six principles of data use in Amsterdam: It must be inclusive, controlled by the people, tailored to the people, legitimate and monitored, open and transparent, and from everyone and for everyone.

Providing a clear transparency statement on data use in recovery efforts will be a critical tool for people to feel safe re-entering and providing their information within increasingly connected city spaces and services. This statement must also include a detailed plan on how those commitments will be fulfilled and how people will be kept continuously informed.

### **Open data and vulnerable populations (principles 5 and 7)—carefully weigh the benefits and risks of the release of public datasets, giving particular attention to health and location data, and impacts on vulnerable populations.**

Data-driven approaches to improving people's health and enhancing the safety of municipalities rely on a large amount of data collection and exchange, across a complex ecosystem of stakeholders—both public and private. In the context of COVID-19, the need for digital transformation has increased, speeding up the need for remote, digital services and the need to immediately learn from data that is being generated to save lives and plan for the future. Yet the way this data is collected and used must be considered together with unintended or disproportionate impacts on vulnerable populations.

A dedicated inclusion council is one means of ensuring representation of underserved communities in response to evaluation and recovery planning. This would promote diversity of thought as technology offices implement [smart city initiatives](#). Through the approaches provided, government bodies can ensure equitable service delivery and determine gaps, opportunities, and areas of improvement within existing municipal initiatives. Oakland's creation of a community-based [Privacy Advisory Commission and Ordinance](#) requiring public approval for surveillance technology, presents an example of community engagement to design and develop a more inclusive, trusted, and secure environment for all as we plan for reopening. The recovery stage provides municipalities the opportunity not only to become more data driven, but more people driven.

**Oversight, accountability and safeguards (principles 4 and 8)—New laws and measures specific to the crisis should also provide specific provisions for oversight and accountability. Use de-identified or aggregate data whenever possible.**

While the response to COVID-19 required some immediate, large-scale changes—significant remote work and learning, increased delivery needs, and increased data transfers—the recovery provides an opportunity to further build the required safeguards and accountability for a sustainable and secure future. A holistic approach to cybersecurity in municipalities is needed for a successful recovery. One that builds layered safeguards throughout the whole ecosystem and outlines a clear accountability framework—is needed for a successful recovery.

An integrated cybersecurity risk framework can enable municipalities to take an inclusive and secure approach to recovery. This includes building accountability and digital trust through new roles and operating models tied to the appropriate use of data, using privacy and security-by-design principles to embed privacy and data protection into all data handling. Municipalities can also develop collaborative cyber threat intelligence and analysis networks to enhance threat monitoring. By creating and testing cyber response and resilience plans, key services can be kept running, while also fostering new cyber competencies through training and awareness. This will lead to enhanced economic development.

Together with our communities, recovery planning should work towards building a more transparent, inclusive, and secure city. Data used in a proportionate and people-driven way will be foundational to successful recovery efforts, helping to ensure that everyone can safely participate in the reopening of our municipalities.



# Charting a path to successful recovery

**To mobilize regional recovery and build economically stable, healthy, resilient, and secure communities that put people's needs at the centre, municipalities should consider the following:**

## Set a clear direction

In the response phase, municipalities and the people in them rallied around a common goal of keeping everyone safe through a rapidly evolving pandemic situation. Alignment in recovery will be equally important as municipalities look to rebuild in safe, equitable ways and, in doing so, chart a course toward a potentially different future municipal role in the fabric of Canadian society. City leaders should set a direction founded on the pillars discussed above and a clear vision for the future of their community that reflects the needs of its people. Leaders will need to work with other levels of government to build fiscal capacity where it's needed to foster growth and find creative, non-financial ways to contribute to the region.

## Build a foundation of trust

Trust is paramount to recovery from COVID-19. For municipalities to recover effectively from the pandemic, they need to consider rebuilding trust along the four critical dimensions of trust as follows:

- Physical: Are we providing safe public spaces where citizens and employees can gather without concern?
- Emotional: Are we safeguarding the emotional needs of citizens and employees and ensuring that we are providing clear and transparent communications to them?
- Digital: Are we advancing the adoption of our digital channels by providing adequate support for the transition? Are we able to leverage any efficiencies we have now identified to bring into the post-pandemic environment?
- Financial: Are we monitoring and ensuring the financial health of our municipality? How can we communicate this to citizens, employees and other stakeholders to avoid surprises?

## Continue to engage people and build community

Building on Deloitte's first piece on responding to the pressures created by COVID-19, engagement becomes even more critical as the strength of communities in this period will make the difference between a successful recovery versus continued vulnerability to future crises. Be clear and transparent with people:

- What is changing and why throughout reopening?
- How do the changes relate back to the city's vision and direction?
- How do the changes reflect people's needs and preferences on how their data is used to support those needs? How do they keep people safe? How do they improve inclusivity?
- How are city leaders adapting to respond to people's input and feedback?

## Flip orthodoxies

Municipalities had to get innovative in the **response phase** when faced with limited information and a lot of uncertainty around what would happen next. They also had to flip orthodoxies—commonly held beliefs about the way something *needs* to operate. Municipalities were able to rapidly mobilize and support vulnerable populations through the acceleration of virtual work for employees, digitization of client experiences across a number of services, cross-functional collaboration, and breaking down of silos. Continuing to explore new decision-making structures, cross-governmental and public/private sector partnerships, and an enterprise mindset to service delivery will require courageous leadership and innovation. City leaders should take stock of the assets and ideas at their disposal and align on how to best deploy them in support of the recovery pillars discussed above. Lessons learned through the response phase will continue to be invaluable to organizational renewal.

## Invest in leadership

The transformation of government resulting from COVID-19 will coincide with the greatest generational shift of leadership in public service, as the baby boom cohort transitions out of senior, administrative leadership roles. This change in leadership must be accompanied by the personal and professional development of municipal management and leaders who will inherit these key positions. Professional development that enhances the ability of these future leaders to manage disruption and lead transformation is required if public service is to keep pace with the required rate of change.

## Position to thrive

Just like the **response phase**, recovery is temporary—undoubtedly though with longer timelines and perhaps longer-lasting consequences. If municipalities continue to build nimble and secure processes and systems, these can be quickly adapted and scaled as indicators show recovery is taking hold and as municipal leaders move into the **thrive phase**.

## Endnotes

- <sup>1</sup> Statistics Canada defines an urban area as a Census Metropolitan Area, an “area consisting of one or more neighbouring Cities situated around a core. A census metropolitan area must have a total population of at least 100,000 of which 50,000 or more live in the core”. References to cities throughout this document, unless otherwise specified, refer to census metropolitan areas. See “Canada’s population estimates: Subprovincial areas, July 1<sup>st</sup>, 2019”, Statistics Canada. Accessed on July 21<sup>st</sup>, 2020.
- <sup>2</sup> Canadian Union of Public Employees (CUPE), “Public infrastructure builds a sustainable, equitable future,” *CUPE*, May 27, 2019, <https://cupe.ca/public-infrastructure-builds-sustainable-equitable-future#:~:text=Municipalities%20are%20responsible%20for%20approximately,municipal%20governments%20for%20infrastructure%20investments>, Accessed on July 21<sup>st</sup>, 2020.
- <sup>3</sup> Almost half of municipal revenue—put towards services, operations, maintenance, and infrastructure—comes from property taxes, with the remainder made up of federal and provincial government transfers, user fees, and taxes on goods and services—about 10 cents on every dollar taxed in Canada. *Ibid.*; Mason, G. “The next COVID-19 crisis? Canada’s cash-strapped Cities,” *The Global and Mail*, April 14<sup>th</sup>, 2020. Select examples: The City of Toronto is losing \$65 million per week and anticipates losing nearly \$800 million by the end of a 12-week lockdown; the Ottawa anticipates losing up to \$273 million by December; the Calgary is losing \$15 million per week; the Edmonton anticipates losing \$112 million this year; and Vancouver has announced they are at risk of going bankrupt and are preparing for a loss of \$189 million this year.
- <sup>4</sup> Jolson Lim, “Municipalities say financial relief urgently needed or safe restart efforts could be derailed,” *iPolitics*, June 19, 2020, <https://ipolitics.ca/2020/06/19/municipalities-say-financial-relief-urgently-needed-or-safe-restart-efforts-could-be-derailed/>, Accessed on July 21<sup>st</sup>, 2020.
- <sup>5</sup> Deloitte, “Competitiveness Scorecard,” <https://www2.deloitte.com/ca/en/pages/finance/articles/canada-competitiveness-scorecard.html>, 2019.
- <sup>6</sup> Ontario Hospital Association, “The Latest Research and Information on COVID-19: Social Determinants of Health”, <https://www.oha.com/news/the-latest-research-and-information-on-covid-19-social-determinants-of-health>, Accessed on July 21<sup>st</sup>, 2020.
- <sup>7</sup> The Guardian, “Amsterdam to embrace ‘doughnut’ model to mend post-coronavirus economy,” April 8<sup>th</sup>, 2020, <https://www.theguardian.com/world/2020/apr/08/amsterdam-doughnut-model-mend-post-coronavirus-economy>, Accessed on July 21<sup>st</sup>, 2020.
- <sup>8</sup> Johnny Diaz, “Cities Close Streets to Cars, Opening Space for Social Distancing,” *The New York Times*, April 11<sup>th</sup>, 2020, <https://www.nytimes.com/2020/04/11/us/coronavirus-street-closures.html>, Accessed on July 21<sup>st</sup>, 2020.

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