

04.11.2024

# What We Heard

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Retail Cannabis Store Handbook Review  
Survey Results

APRIL 2024



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# RCSH Review Survey

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## INTRODUCTION

Alberta Gaming, Liquor and Cannabis (AGLC) is responsible for licensing, regulating, and monitoring cannabis activities in Alberta. AGLC administers the *Gaming, Liquor and Cannabis Act* (GLCA), Gaming, Liquor and Cannabis Regulation (GLCR) along with related policy.

AGLC is focused on reviewing its policies to ensure they support economic development and industry growth while reflecting a commitment to public health and social responsibility. This report summarizes the results of a survey with industry stakeholders focusing on policies that relate to cannabis industry operations and processes. This is part of an ongoing commitment to reviewing and modernizing Alberta cannabis policies to reduce red tape and administrative burden for industry.

## BACKGROUND

Licensed producers and retailers are integral elements of Alberta's cannabis model. Licensed producers grow and cultivate cannabis for sale and are regulated by Health Canada. Retailers provide cannabis for sale for legal, recreational use by the public. AGLC is the regulator and wholesale distributor for cannabis to retailers. The majority of AGLC's policies governing the operation of retailers are contained within the Retail Cannabis Store Handbook (RCSH).

Several policies within the RCSH were identified as benefitting from review. As a result, a survey was created to engage the cannabis industry on these topics.

This review aligns with the government's commitment to provide effective regulation and increase opportunities for business.

## METHODOLOGY

The RCSH Review Survey was distributed to cannabis stakeholders for feedback on January 17, 2024. The survey remained open for feedback until February 6, 2024.

Respondents were asked some demographic questions and then a number of specific policy related questions on topics ranging from sensory display containers to secure storage. Respondents were also afforded an open-ended opportunity to provide input on any policy topics not specifically covered in the survey.

## RESPONSE RATES

**AGLC invited a total of 517 cannabis industry stakeholders to participate in this survey and received 204 responses revealing a response rate of 39 per cent.** Participants included cannabis retail stores, cannabis licensed producers, brand owners and/or marketing entities.

## CONSULTATION FINDINGS

To ensure that all cannabis stakeholders had equally weighted input, the survey invitation requested survey invitees to submit only one survey response. The number of survey responses (response rate percentage) per cannabis industry sector are as follows:

| TOTAL* | RETAIL STORE      | LICENSED PRODUCER | BRAND OWNER     | MARKETING ENTITY |
|--------|-------------------|-------------------|-----------------|------------------|
| 204    | 144 (64 per cent) | 54 (24 per cent)  | 17 (8 per cent) | 10 (4 per cent)  |

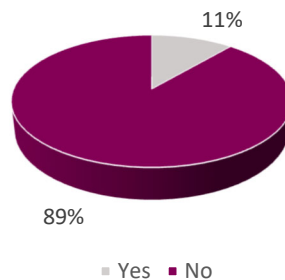
*\*Total responses are not the sum of the responses per industry sector because survey participants can be categorized in multiple industry sectors. Percentages are based on how many respondents selected each category out of the 204 unique respondents that completed the survey.*

### Topic One: Policies on Sensory Display Containers

Respondents were asked to review section 4.8 of the RCSH, which governs the use and display of cannabis in sensory display containers.

Respondents were asked whether they used the containers; 115 cannabis retailers responded. 102 responding retailers (89 per cent) do not currently use sensory display containers in their stores while 13 participating retailers (11 per cent) do. The commonly cited reason for not utilizing sensory display containers was the cost of purchasing product from their own inventory to put in the containers. Respondents indicated that this was amplified by the swift degradation of the product once in the container.

#### Sensory Display Container Usage



Respondents were also asked to provide suggestions on how to amend policies regarding sensory display containers. Many respondents felt the containers have potential benefits as they enhance customer experience through interaction, provide product quality assurance and ultimately help customers make better purchasing decisions.

One of the more commonly made suggestions was to allow Licensed Producers (LPs) to provide the product used to fill sensory display containers to retailers. Other notable suggestions were to ease or remove limitations on the number of display containers allowed and the amount of cannabis product inside. Respondents also suggested that the security requirements on sensory display containers be removed or eased.

Additional responses are listed below:

| Support for use of samples  | Other suggestions  |
|---|--|
| <i>"We would love to offer this experience to our customers if LPs could provide this at no cost to retailers."</i> | <i>"Allow more than 10 containers in the store."</i>   |
| <i>"We should be able to receive samples from LPs to display at no cost."</i>                                       | <i>"No limit on amount of containers."</i>   |
| <i>"Allow retailers to accept free product samples from producers to be used for display sensory purposes."</i>     | <i>"Would like to see larger amounts of cannabis allowed per display jar as well as an opportunity for the guests to touch the product."</i> |
| <i>"Don't make us buy it from our own inventory. Let producers provide samples."</i>                                | <i>"The ability to put a little more product in, so we do not have to break apart nice looking buds before putting them in."</i>             |
|   | <i>"If displays could be left out overnight, it would help keep the display intact and reduce wasted product."</i>                           |

Other suggestions included easing reporting requirements around sensory display containers and easing rules around disposal of refuse material.

Survey respondents were also asked what the impact to their business would be if their proposed changes were implemented. Most respondents stated there would be no impact, likely because those participants either don't currently utilize sensory display containers or do not wish to incorporate them into their business model. Other respondents indicated that their suggestions could reduce operating costs and increase consumer confidence in their purchasing decisions. These responses are listed below:

| Benefit – decreased costs   | Benefit – consumer confidence  |
|---|--|
| <i>"With the current regulations we do not see the value for our guests to provide sensory displays. With the limited amount of product allowed in the containers at a time we have found the product degradation occurs rapidly and the cost of replacing product continuously is costly."</i> | <i>"A challenge to our business is pricing compression (lower wholesale prices = lower retail prices to stay competitive= lower bottom line\$). It's challenging to sell expensive and quality weed without proving to the customer what it looks/feels like."</i> |
| <i>"Less cost to the retail store for writing off products to display, less paperwork, should be easy implementation on packaging that would increase cost to LP very little or not at all."</i>  | <i>"Easier to convert customers to legal cannabis products when they can see the legitimacy of the products. Current packaging does not allow the customer to see the product before purchasing."</i>  |
| <i>"Decrease the financial burden on retailers when trying to showcase product. Increase transparency between the legal recreational market and customers - eliminating concerns of "popcorn buds" and dry bud that was seen in early days of legalization."</i>                                | <i>"Consumer can make more educated and responsible choice thus converting into responsible...use. That benefits not just the business with more sales but also Cannabis as a whole industry."</i>   |

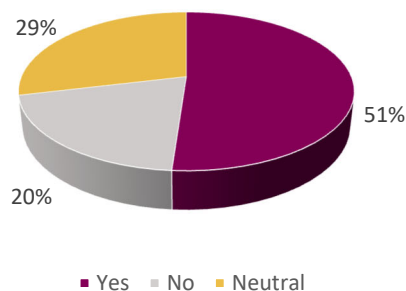
*"Right now, retailers have to order most products blind (unless they have been given a sample of the product in advance by the producer) and customers are ordering blind due to the need for cannabis products to be pre-packaged."*

*"People would feel much more confident about their purchases. There would be a really great conversation and connection ... What does craft flower look like vs large production/cheap flower. More educated on why they pay what they pay?"*

## Topic Two: Secure Storage Room Requirements

Under section 3.3 of the RCSH, retail cannabis stores must adhere to specific physical security requirements, including providing a secure storage room for cannabis products. Respondents were asked to review this section and whether the rules concerning secure storage rooms should be eased. One hundred seventy-five responses were received. Responses were split with 90 respondents (51 per cent) indicating that secure storage rooms policies should be eased while 85 respondents (49 per cent) either did not feel security policies should be amended or were neutral in their opinion.

### Secure Storage Room - Ease Requirements



Survey participants were asked specifically what they'd like to see changed regarding secure storage room requirements. Several themes emerged, including removing the requirement of nightly return of cannabis products to storage rooms\*, easing construction guidelines for secure storage, and making cannabis security requirements more equal to liquor store security requirements. Respondents identified a number of benefits related to easing construction guidelines for security storage rooms, including reduced construction costs and decreasing the amount of time to build new stores. Many respondents also commented that they would like to be able to store more than just excess cannabis inventory in the secure storage rooms.

\* Note: The nightly requirement to move cannabis products to storage rooms was removed on January 31, 2024. Currently, policy stipulates that cannabis must either be stored in a locked showcase in the customer area or in a locked storage room accessible only by authorized staff.

Individual survey responses are included below:

#### Support for easing requirements

*"We would suggest eliminating the restriction that exists on non-cannabis goods being stored in the same place as cannabis goods... Many stores have extremely limited storage areas and reducing the need for separated areas would reduce concerns here."*

*"Easing of the construction material requirements to allow for lower cost build options. Alignment with adjacent industries (i.e. Liquor Store) storage area physical security requirements."*

*"I would like to store other items in the storage room that are not cannabis. We created a huge storage room and now can't use it for misc accessories so the accessories are stored all over the store when there is lots of potential room in the storage room."*

*"Physical security should be a retailer problem and not an AGLC issue. All cannabis is purchased from the AGLC and risk management should be up to the business."*

*"I would like to see the removal of the requirement for a secured cannabis storage area. It has proven to not deter robberies, rather all the goods are in one convenient area, and to get into the area, staff are targeted. "*

*"There is no need to have a vault and lock up cannabis. Ontario removed this requirement over 2 years ago it is an unnecessary waste of cost and labor."*

*"There needs to be a relaxation on door and frame gauge requirements. Very expensive doors and frames that do not provide more security. They just cost more and take forever to order. Cannabis storage rooms do not need to be built to the standard of bomb shelters...Total overkill."*

*"They are not necessary and change nothing. Liquor stores do not have them. It is a completely unnecessary expense when building a store. Putting product in storage room after hours is a waste of time, and costs a significant amount extra in employee wages."*

Survey participants satisfied with the current physical security requirements, including a secure storage room for cannabis products, were given the opportunity to voice their support. There were 33 responses.

### Support for status quo

*"One of our stores has had 2 attempted break ins and one successful break in. Having the cannabis locked in secured storage room kept it safe and the burglars left without any cannabis. The secure storage rooms do help to deter burglars and minimize what is stolen."*

*"With break ins it puts my mind at ease as a business owner to know that if a burglary took place it would be more difficult for the cannabis to be stolen. For the 15 minutes it takes to put away and put out it seems that 1/2 hour of paid wages is worth more than having cannabis stolen. "*

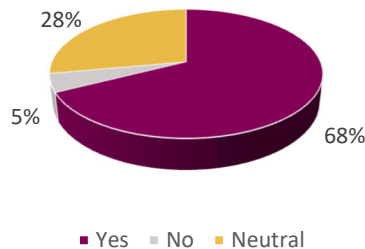
*"The secure storage room itself is a good idea. As a business owner I get some peace of mind knowing that my inventory is stored in a place that makes it less likely to be stolen. The construction requirements of the secure storage room are fine."*

*"Our current standards provide retailers with a safe environment to conduct business. We have had many robberies in the industry since cannabis was legalized, a secure area for products protects both public and stakeholders."*

## Topic Three: Non-Cannabis Items for Sale in Retail Cannabis Stores

Section 4.3 of the RCSH outlines items that retail cannabis stores are prohibited from selling. Some of the items on the list are prohibited due to federal legislation, as such, input was sought from respondents to assist with AGLC’s and government’s future discussions with its federal counterpart. Survey participants were asked what products that are currently not permitted for sale in retail cannabis stores should be permitted. This question was answered by 155 respondents, with 105 respondents (68 per cent) supportive of other items being sold, 7 respondents (5 per cent) against and 43 respondents (28 per cent) neutral on the topic.

### Offer Additional Items in Stores



Note: percentages do not add to 100 per cent as they are rounded.

Most respondents indicated they would like to offer additional products to customers, explaining that this would enhance customer experience and increase revenues. Common items requested by respondents included lighter fluids/butane, home edible mixing products (jellies/mixes), apparel, producer branded items, non-infused drinks and snacks.

Respondents were asked why they favoured an expansion of product offerings.

| Customer Experiences  | Revenues  |
|---|---|
| <i>“Increased competitive edge with giftshops, and grey market websites. Ability to complete customer sales in one shop rather than sending them to competing vendors. Reduce complaints from customers who shop in other provinces where regulations are interpreted differently and these items are freely available in their shops.”</i> | <i>“Retailers should be able to sell products that are related to what they are already selling that complements and grows their basket sizes. Allows for more variety and allows stores to be a one stop shop for consumers. Opening up what stores are allowed to sell allows for stores to differentiate from one another. We would like to carry more products that complement our current offerings such as butane and other consumables.”</i> |
| <i>“We should be able to sell products that complement our industry. -Consumable products such as beverages and small snacks- Products to support consumers to make their own edible products at home. Jelly mixes etc - Butane to refill lighters and torches which are used for cannabis consumption.”</i>                                | <i>“Increased revenue, increased customers, increased selection of accessories and revenue streams. Would help business profitability and sustainability. Can re-invest these profits into higher wages for the team which stimulates the economy and increases income taxes to gov.”</i>   |



*“Bottled water, lozenges & gum (that does not contain cannabis). Products to assist with reducing some side effects of cannabis such as dry mouth. These would enhance a consumer’s cannabis experience in a positive way.”*

*“Additional revenue streams. Would love to offer locally made items (jewelry/cards/crafts). It would be great to offer snacks or non-cannabis related food items.”*

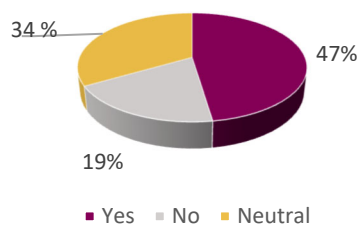
Survey participants were asked what sorts of additional items they would consider offering patrons if restrictions were loosened. Below are a few of the replies that are representative of what we heard in the feedback received:

| Additional items retailers may want to sell   |  |
|---|--|
| <i>“Detox kits and Butane.”</i>   | <i>“Cannabis artwork that show the product being smoked. Or cannabis artwork featuring Bob Marley or Cheech and Chong. Being able to not just sell these items but be allowed to decorate our stores with artwork from our culture.”</i> |
| <i>“Chips, pop, chocolate of various types, baked goods, candy.”</i>  | <i>“Branded material.”</i>   |
| <i>“Bottled water, lozenges &amp; gum (that does not contain cannabis).”</i>                                    | <i>“Butane &amp; Torches for concentrate consumption. We can sell the products &amp; glassware needed, but it doesn't make sense to not be able to provide the torch.”</i>   |
| <i>“This would help increase sales for smaller outlets. Snacks or munchies, go hand in hand with cannabis.”</i> |  |

## Topic Four: Expanded Activities in Cannabis Retail Stores

Section 4.7.1 of the RCHS stipulates that activities in a retail cannabis store must be directly related to the responsible sale of cannabis or cannabis accessories with the exception of charitable activities and campaigns. Survey respondents were asked if this policy should be amended and, if so, what additional activities should be allowed to take place in cannabis retail stores. This question was answered by 148 respondents, with 70 (47 per cent) favouring expanding the types of activities permitted in retail cannabis stores while 28 (19 per cent) were not in favour and 50 (34 per cent) were neutral on this topic.

Support for Expanded Activities in Stores



Many respondents felt that current limitations on activities constrains potential business opportunities and revenues.

### Constraints to business opportunities reported by respondents

*“This restriction is arbitrary and unnecessary. In a challenging market, many stores have space that could be used for things like yoga classes. Businesses are unable to take advantage of opportunities to offer additional activities and services in their communities, despite establishing robust controls related to cannabis inventory management, security and sales.”*

*“LPs face constraints in utilizing conventional marketing methods. We aim to engage with consumers in age-gated environments such as cannabis retail stores to boost product awareness, enhance education, and distinguish our products, enabling consumers to make more informed choices.”*

*“The restricting on age (18+) going into the store is limiting enough. There should be no other limits to stores. If stores want to have a pop up party and showcase vendors they should be allowed. Or to have a popcorn party in the store while selling product, I think the stores should be able to monitor their own activities.”*

*“This policy limits opportunities that might attract new customers... adult customers who should be responsible to make educated decisions.”*

Common suggestions for expanded activities included educational/informational sessions and simulated demonstrations such as how to roll a joint, how to grow cannabis, how to infuse food and make oils. Some respondents indicated that allowing educational sessions would help to de-stigmatize negative perceptions of cannabis, inform consumers and help further legitimize the cannabis industry. Additionally, survey participants would like to see better alignment with activities permitted in the retail liquor industry. Specific examples cited include:

- Joint rolling classes
- Rosin press demonstrations
- Engraving accessories
- Accessory demonstrations, accessory options
- Activities related to cannabis cultivation (how to's, growing equipment, plant exhibits)
- Hospitality events (yoga, mindfulness, design your own rolling tray, game nights, paint nights, art events, social events, grand openings, anniversary events)
- Cannabis culinary classes (how to prepare products at home, making/infusing edibles, cooking with cannabis)
- LP/Retailer events, such as interactive trade marketing promotions for LP brands, brand building events and product knowledge seminars
- Educational events (accessory cleaning, learning about cannabinoids, terpene facts, making hash)
- Consumption education and demonstration
- Allowing for sales of coffee and non-cannabis food items/beverages

Additional responses are presented below:

### Examples of activities industry would like to see permitted in retail cannabis stores

*“Anything that is legal for a person to do with product should be allowed. It’s important that we educate people on the effects and talk openly about what product consumption does and the effects. There are a lot of first time users with the legal market opening and I think we should be ensuring that stores have access to share information on pressing or rolling or anything cannabis related.”*

*“We would like to have events or info sessions that provide information on the medical use or health benefits of cannabis by a cannabis clinic owner or medical professional. We would also like to have events that show mixing of cannabis to help educate our customers, for example how to create your own edibles, even if on site consumption is not allowed.”*

*“Being able to offer a joint rolling class or a growing class were we can actually use cannabis to roll or see a real cannabis plant would be beneficial to our business and to customers looking to learn.”*

*“Definitely proper use of cannabis accessories demonstrations. Educate the public. Teach them how to roll with rolling papers properly, how to use a vape properly and at what temperatures should a vape burn, how to properly use a dab rig, etc.”*  
*The consumer needs to be educated on how to partake in the cannabis products and why temperature levels are so important (ex. carcinogens when burned too hot, etc.).”*

*“Selling Hemp-based clothing (without the 15per cent sales cap) and other useful day to day things can be allowed. Definitely Cannabis Experiences: Music therapy, Group therapy, Meditation, engaging competitions etc.”*

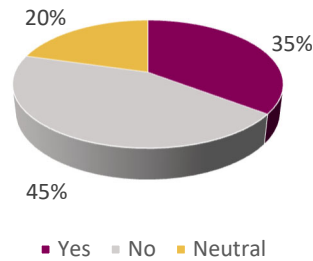
*“Anything that can reach an age appropriate consumer in store that doesn’t involve alcohol, tobacco or illicit drugs should be reasonable to explore. Example nail painting while you learn about cannabis products, or smell sessions.”*

When asked about the benefits of expanding activities permitted in retail cannabis stores, respondents cited it would develop a more educated and informed consumer base, provide an enhanced customer experience and increase profitability.

## Topic Five: Prohibited Inducements and Benefits

Sections 117 to 120 of the GLCR and section 6.3 of the RCSH sets out the rules regarding prohibited inducements and relationships. Respondents were asked if AGLC should play a role in regulating relationships between cannabis suppliers and retailers. This question was answered by 137 respondents; 48 respondents (35 per cent) supported AGLC’s role in regulating such relationships, 61 (45 per cent) of respondents feel that AGLC should not be involved and 28 (20 per cent) of respondents were neutral.

### Support for Regulating Relationships

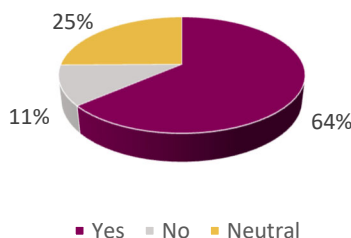


Some respondents stated that AGLC oversight is essential to protect provincial cannabis industry interests and ensure equal competition between smaller independent retailers and larger corporations. Conversely, others feel that AGLC does not have adequate resources to effectively regulate and enforce supplier retailer relationships and that such relationships currently exist in the industry. Two themes surfaced; industry effectiveness and equal competition. Many respondents expressed that AGLC should be playing a greater role in policing inducements. Specific responses included the following:

| Theme 1<br>Industry effectiveness  | Theme 2<br>Equal competition  |
|--|---|
| <i>“AGLC makes for complications in an industry that already is facing major hurdles.”</i>   | <i>“Keeps the playing field neutral and as equal as possible.”</i>  |
| <i>“Yes, AGLC should ensure that there are no 'backroom deals' between retailers and suppliers that undermine AGLC wholesale prices.”</i>  | <i>“There is too much potential for the big producers to influence retailers if the regulations were loosened or lifted.”</i>   |
| <i>“1) AGLC does not have the power, resources, or willpower to regulate these relationships. Every single business in the industry right now takes part in inducements and you know they do. 2) Inducements have already had a major effect on the industry, so any changes made now would be a moot point.”</i>                        | <i>“I believe it's too early in the industry for AGLC to back away from this now. DATA deals are the most destructive part of this industry and needs to stop, there is no part of a change that would dramatically help the industry. Many scenarios in the opposite as we have chains owning LP's now.”</i>   |
| <i>“One of the greatest challenges is the high cost of taxes and usury fees in Alberta. Saskatchewan has created a model that allows for greater connectivity through retailers and LPs. This model allows cannabis to be competitive to the illegal market. Concurrently, this model is closer to the alcohol industry in Alberta.”</i> | <i>“Absolutely. There are already 'relationships' between suppliers and larger retail stores. Kickbacks are being offered under the table under the guise of 'selling data' to the suppliers. This should ABSOLUTELY not be allowed. It is definitely beneficial to large chain stores only. The suppliers aren't interested in the small amount of cannabis that is sold by the smaller stores.”</i> |

In 2022, AGLC updated policies governing prohibited relationships in the liquor industry. Changes included supporting more brand-related educational experiences to provide increased knowledge of products and brands, updating online promotion restrictions to better connect with customers and allowing more direct support from agencies when providing live entertainment. In the RSCH review survey, participants were asked if similar changes should be implemented for the cannabis industry. This question was answered by 136 respondents, with 87 (64 per cent) respondents in favour, 34 (25 per cent) respondents neutral and 15 (11 per cent) respondents opposed.

### Support for Alingment with Liquor Policies



Many respondents felt that parity with the rules governing the liquor industry should be pursued, especially in the cannabis industry while focusing on reducing the illicit market. Two themes surfaced from the survey results; (1) industry modernization and (2) equality with the liquor industry. Below are additional survey responses:

| Theme 1<br>Modernization  | Theme 2<br>Equality   |
|---|---|
| <i>“There could be further improvements to samples. Samples are limited to 30 grams, but when a supplier has multiple SKUs and we have a staff of 6-7 in a store, the limit is reached very quickly... Tracking the *many small* samples that arrive is tedious. Sometimes, there is only enough of a SKU/sample given for 1-2 budtenders to try, due to limits.”</i> | <i>“Alignment with alcohol would represent a positive step but not nearly enough, given the unique nature of the cannabis industry versus alcohol...legal cannabis retailers must still compete with an entrenched and resilient illicit market. Therefore...AGLC needs to go much further with respect to cannabis. Our preference would be for the removal of all prohibitions on direct relationships between retailers and LP’s.”</i> |
| <i>“I would like to see advertising relaxed. We have virtually no place to advertise as an advertisement cannot be used anywhere a minor could see it.”</i>   | <i>“I don’t believe these relationships should be prohibited. For alcohol they are not prohibited so I don’t understand why they are for cannabis.”</i>   |
| <i>“I would like to see Alberta follow the Saskatchewan direct link to store model.”</i>  | <i>“Whatever liquor stores are allowed to do, cannabis stores should be allowed as well.”</i>   |
| <i>“Remove any restrictions related to supplier-retailer relationships. Both players operate within their applicable regulatory frameworks, respecting consumer inducement prohibitions to maintain health and safety controls. Permit LPs to direct ship through a consignment model.”</i>   | <i>“More direct relationships between cannabis retailers and the LPs that align with the alcohol industry in Alberta. Allowing product differentiation for the retailers at a negotiated price with LPs allow for sustainability to come back to the space.”</i>  |

## Additional Comments

The final question provided respondents with an opportunity to identify any other policies within the RCSH needing review.

### Responses

*“Edibles and beverages should be permitted for consumption in retail stores or bars/restaurants. Would present a new sales opportunity and offer something the illicit market can’t.”*

*“Remove red tape that requires retail employees to complete Qualified Cannabis Worker applications and be approved by AGLC on top of the SellSafe Cannabis Staff Training. In liquor, employees are only required to complete the ProServe Liquor Staff Training. Refer to section 90.071 of the GLCA and section 126 of the GLCR. In Manitoba, the licensee is responsible for completing employee security screening directly and does not require approval (time and fees) of the regulator.”*

*“Delivery windows, please implement a maximum of 4-hour window for deliveries.”*

*“As far as wholesaling/distribution, a consignment model like in liquor seems like a good idea, where retailers can buy directly from the producers if they buy shelf space at the aglc warehouse. ”*

*“There are too many rules around cannabis promotions/marketing and how involved we can be in community. We would like to be able to sponsor events and be included. Retailers should be able to buy direct from LPs to improve the distribution of product and selection. Business relationships are possible in any other industry, but many red tape rules exist to discourage that in Cannabis. Less overall tax for the industry and small business in particular could make the industry more sustainable and competitive with the black market we are trying to eradicate.”*

*“No. However in Ontario they are making a HUGE mistake by entertaining an Amazon style, online, type model. Please do NOT allow this in Alberta. This will kill us. People work hard and take so much pride in their store fronts and there is no way that small stores, especially rural stores with low volume, will be able to remain viable under the model that Ontario is proposing.”*

## CONCLUSION

This consultation captured a variety of perspectives from stakeholders both in support of current policies and those interested in seeing amendments.

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AGLC is committed to continually reviewing and modernizing policies and wishes to thank all stakeholders for their participation in the RCSH Review Consultation.