



# CO-ORDINATOR'S FINAL REPORT

## “Stronger Together”

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Region of Windsor and West Hants Municipality

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## I. INTRODUCTION

More than three centuries after two Nova Scotia municipalities were founded, they became one on April 1, 2020. The Region of Windsor and West Hants Municipality (“W/WH”) began its new unitary life 16 months after the Nova Scotia government passed special legislation to facilitate the friendly merger.

Voluntary municipal consolidations are extremely rare in Nova Scotia, especially between long-standing rural and urban communities. Looking back, it’s clear that the consolidation process went well. The structure of the Co-ordinating Committee was well thought through and the goodwill of its members, and the communities they served, was constant.

W/WH’s experience of joining together and moving through a friendly consolidation is instructive for any local government wanting to understand the driving forces for a successful merger, the mechanics of the transition process and anticipated outcomes.

The W/WH municipal merger is unique in many respects:

- It stands in contrast to other recent Nova Scotia restructuring ventures since it resulted from a joint request of the two councils for special legislation to establish the new regional municipality. It was not created by edict from a senior level of government nor did it result from a dissolution supervised by the Nova Scotia Utility and Review Board (the “NSUARB”);
- The special legislation conferred responsibility for designing the new governance model and administrative structure to a Co-ordinating Committee comprised of elected officials from the region itself;
- The legislation provided a tie-breaking mechanism to ensure that the Co-ordinating Committee had the ability to make timely decisions. In contrast to a consensual approach, this model ensured that the Committee functioned in an organized, thoughtful and deliberate manner;
- The project had an end date, namely April 1, 2020 for completion of the Committee’s work and start-up of the new unit; and
- On completion, the Committee turned responsibility for W/WH over to the newly elected Mayor and council effective April 1, 2020.

The result, we believe, is a municipality with a refreshed council and strong administrative foundation that will function more effectively for the combined region than would otherwise have been the case. “Change is not just the responsibility of the federal and provincial governments”, said Mayor Allen, “it’s also our responsibility, starting at the grass roots”. In passing, it should be noted that the new council includes three members of the Co-ordinating Committee who ran in the March 7 elections, including Abraham Zebian who was elected as Mayor of the new regional municipality. “This is proof,” said Mayor Zebian, “that the residents trust and follow their elected officials” on big issues like the merger.

This report is prepared with the experience and learnings of the merger top of mind. Its focus is two-part: first, describe and explain the merger and the path that led to and through it; and second, to reflect on the merger process and identify key lessons and recommendations for other units considering a similar path. In this way, local governments and the citizens they serve will have a better understanding of some of the expected results of a merger and a proven path to creating a successful unitary municipality.

## II. CAST OF PLAYERS

### Co-ordinating Committee

- Mayor Anna Allen (Town of Windsor)
- Deputy Mayor Laurie Murley (Town of Windsor)
- Warden Abraham Zebian (Municipality of West Hants)
- Deputy Warden Paul Morton (Municipality of West Hants)
- John Bregante (Alternate / Town of Windsor)
- Jennifer Daniels (Alternate / West Hants / December 2018 – October 2019)
- Rupert Jannasch (Alternate / West Hants / October 2019 – April 2020)
- Kevin Latimer, Q.C. (Transition Co-ordinator)



Members of the Windsor-West Hants Transition Committee, include, from left: West Hants Deputy Warden Paul Morton, Windsor Mayor Anna Allen, Transition Co-ordinator Kevin Latimer, West Hants Warden Abraham Zebian and Windsor Deputy Mayor Laurie Murley (Photo by Colin Chisholm)

**Project Administrator:** Donna Jones

**Town of Windsor CAO:** Louis Coutinho

**Municipality of the District of West Hants CAO:** Martin Laycock

**The Region of Windsor and West Hants Municipality CAO:** Mark Phillips

**Minister of Municipal Affairs and Housing:**

- The Honourable Derek Mombourquette (2017-2018)
- The Honourable Chuck Porter (2019-2020)

**Department of Municipal Affairs and Housing Team**

- Shannon Bennett
- Emily Pond
- Ron Dauphinee
- Nick Barr
- Mark Peck

**Town of Windsor Council**

- Mayor – Anna Allen
- Deputy Mayor – Laurie Murley
- CAO – Louis Coutinho
- Councillor – John Bregante
- Councillor – Jim Ivey
- Councillor – Shelley Bibby
- Municipal Clerk – Shelleena Thornton
- Director of Community Development - VanEssa Roberts
- Director of Finance - Doug Armstrong
- Director of Public Works – Todd Richard

**Municipality of the District of West Hants Council**

- Warden – Abraham Zebian
- Deputy Mayor – Paul Morton
- CAO – Martin Laycock
- Councillor District #1 – R. Jannasch
- Councillor District #2 – K. Monroe
- Councillor District #3 – D. Keith
- Councillor District #4 – T. Leopold
- Councillor District #5 – D. Francis
- Councillor District #6 – R. Hussey
- Councillor District #7 – J. Daniels
- Councillor District #10 – R. Zwicker
- Municipal Clerk – R. Brown
- Director of Finance – Carlee Rochon
- Executive Assistant/Communication Coordinator – Chrystal Remme
- Director of Public Works – Brad Carrigan
- Director of Planning – Madelyn LeMay
- Director of Parks & Recreation – Kathy Kehoe

### III. BACKGROUND

Prior to their merger on April 1, 2020, the Municipality of the District of West Hants (“West Hants”) and the Town of Windsor (“Windsor”) were distinct municipal entities. They each had their own Councils, CAOs and administrative workforces. Although some services were shared between the units, the municipalities taxed residents separately and represented distinct communities.

West Hants, a predominantly rural area, had a population of approximately 15,368 and covered 1,244 km<sup>2</sup>. By comparison, Windsor’s population was approximately 3,648. It comprised an area of approximately 9 km<sup>2</sup>. Windsor constituted the central business district in the middle of the former West Hants geographic area.

West Hants had been through a previous consolidation. In 2015 the Town of Hantsport became part of West Hants by order of the NSUARB following a Town Council vote to dissolve its municipal incorporation. At the time of dissolution, Hantsport’s population was approximately 1,500.

Between 2006 - 2016, West Hants and Windsor had slightly different trends in population growth. West Hants had a steady rise in population after 2001, increasing from 14,982 in 2001 to 15,370 in 2016. Windsor’s population fluctuated through the same period of time, generally hovering around 3,700.

Each of the units enjoyed reasonably good financial health. The Department of Municipal Affairs compiles annual reports that focus on financial matters, administration and community characteristics. The overall Financial Conditions Index Assessment (“FCI”) for both West Hants and Windsor in 2017 – 2018 was green (low risk). The highlights from their respective reports showed good financial management around maintaining liquidity, managing debt levels and minimizing reliance on government transfers.

The municipal reports indicate that in 2018 West Hants generated 75% of its municipal revenues from its own sources while 25% came from transfers from other levels of government. In Windsor’s case, 78% of municipal revenues were generated from Windsor’s own sources, while 22% came from transfers from other levels of government.

Generally speaking, the assessment and dwelling growth trends of the municipalities were favourable. The respective tax bases of the two units were complementary. West Hants had a strong residential / resource tax component. Windsor had a relatively strong commercial tax base. Each had something different to contribute to the new whole.

Ultimately, the merger brought together a larger and a smaller partner. One being predominantly rural, comprising 51 rural communities. The other being mainly urban. The larger rural partner geographically surrounded the smaller urban district. Highway 101 intersects both units. Both enjoyed relatively good fiscal health.

While both units were performing reasonably well, both recognized limits on their ability to thrive without real structural change. They had experienced increasing friction competing for new growth opportunities and through a number of aggravating inter-municipal issues. By 2018 those challenges translated into citizen advocacy favouring the need to come together. The time was ripe for strong municipal leadership to create a new form of local government that would better serve the citizens of the region.



#### IV. PRELUDE TO MERGER

West Hants and Windsor had a history of citizens from both communities working towards a new municipality. These discussions waxed and waned over time but came to a head in 2016 when citizens from both West Hants and Windsor filed an application<sup>1</sup> with the NSUARB to amalgamate the municipalities. The primary focus driving the initiative centered on seizing regional growth opportunities and delivering better and more efficient services for citizens of the region. The application was filed pursuant to section 358(c) of the *Municipal Government Act*, S.N.S. 1998, c. 18 (“MGA”) and was supported by petitions gathered by the Avon Region Citizens Coalition (“ARC”), which were signed by more than 2000 electors in West Hants and more than 500 electors in Windsor.

The ARC application was adjourned in February 2017 when West Hants and Windsor entered into a Memorandum of Understanding (“MOU”)<sup>2</sup>. While the municipalities had different views on amalgamating the two units, the MOU reflected their common desire to “work collaboratively and more closely on areas that will strengthen our greater community”.

Working in association with the Province, the leadership at both the elected and administrative levels carried the two units into a municipal modernization project by the spring of 2018. In correspondence dated February 22, 2018<sup>3</sup> to Mayor Allen and Warden Zebian, then Minister Mombourquette said, “We look forward to working with you over the next several months to develop and pilot a new approach for regional governance that could serve as a model for other municipalities”. This eventually led to formal requests<sup>4</sup> from the respective councils to the Minister of Municipal Affairs in July 2018 to enter “negotiations to consolidate the two municipalities through special legislation and that the process be completed no later than December 31, 2020”.

Three months later, in October 2018, the Province passed the *Region of Windsor and West Hants Municipality Act* (“Bill 55” or “the Act”)<sup>5</sup> creating the Region of Windsor and West Hants Municipality effective April 1, 2020 (the “Regional Municipality”). Bill 55 established a Co-ordinating Committee with responsibility to design and implement the governance and administrative structures of the Regional Municipality. The Act provided for the appointment of a Co-ordinator by the Governor-in-Council to act as Chair of the Co-ordinating Committee and vote on questions considered by the Committee in the case of a tie.

In order to provide the Co-ordinating Committee with guidance when making decisions concerning the consolidation of the two communities, the two councils devised “Guiding Principles<sup>6</sup>” at a joint council workshop in October 2018. Among other things, the Guiding Principles called for inclusion of the culture of both the urban and rural communities in the new community, using the existing tax system as a base for developing a taxation model for

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<sup>1</sup> ARC application to NSUARB

<sup>2</sup> Windsor/West Hants Councils MOU

<sup>3</sup> Letter dated February 22, 2018 from Minister Mombourquette to Mayor Allen and Warden Zebian

<sup>4</sup> Requests from councils to Minister of Municipal Affairs

<sup>5</sup> Bill 55, *Region of Windsor and West Hants Municipality Act*

<sup>6</sup> Guiding Principles

the consolidated community and making decisions with a view to economic development opportunities for the new region.

Two months later, in December 2018, Kevin Latimer, Q.C. was chosen through a procurement process as Co-ordinator for the project. The appointment of the Co-ordinator was made by Order-in-Council<sup>7</sup> dated December 4, 2018.

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<sup>7</sup> Order in Council for Co-ordinator appointment

## V. PROJECT TIMELINE



## VI. TRANSITION TO W/WH

### i. Special Legislation

Bill 55 established the Co-ordinating Committee's authority to design and implement the new operational structure of the Regional Municipality. The Co-ordinator was tasked to manage the consolidation in conjunction with a Co-ordinating Committee including the Mayor and Deputy Mayor of Windsor, and the Warden and Deputy Warden of West Hants. Each unit also designated an alternate to attend meetings of the Committee where a member of the Committee from that municipal unit was unable to attend.

The Act gave the Co-ordinating Committee all the powers of the Council of the Regional Municipality until the Council took office in April 2020. In carrying out its mandate, the Act gave the Committee authority to utilize information and assistance from West Hants and Windsor "as requested by the Co-ordinating Committee." It stipulated that upon incorporation of the Regional Municipality all acts of the Committee would have full force and effect and be deemed to have been exercised by the Regional Municipality.

The Act designated the Co-ordinator as Chair of the Co-ordinating Committee. It provided that all decisions of the Co-ordinating Committee were to be determined by majority vote. The Co-ordinator had authority to vote on questions considered by the Committee in the case of a tie. In such cases the decision of the Co-ordinator was final and binding. The Committee had final say on all decisions concerning the Regional Municipality's governance structure with the exception of the Council size and boundaries of polling districts for W/WH. The Co-ordinator was responsible to make an application to the NSUARB for approval of that aspect of the new entity.

Through the transition, the Act limited the ability of the two municipalities to commit or expend resources beyond March 31, 2020 except as authorized by the Co-ordinating Committee. For instance, neither unit could enter contracts extending beyond March 31, 2020, dispose of a capital asset or expend funds from an operating or capital reserve fund except as authorized by the Committee. On a forward-looking note, the Act addressed certain labour force issues from the perspective of both union and non-union employees. It also provided that the bylaws, orders, policies and resolutions in force in the two units immediately prior to April 1, 2020 continued in force in the area over which that municipal unit had jurisdiction until amended or repealed by the Council.

The Act required the Co-ordinating Committee to appoint a CAO for the Regional Municipality by January 1, 2020. Bill 55 mandated that the first election of Mayor and Councillors of the Regional Municipality be held on the first Saturday in March 2020. The Act confirmed that the Regional Municipality was exempt from conducting municipal elections in the ordinary course in October 2020. It left the naming of the Regional Municipality to the new Council. The Act gave the Minister authority to provide for "anything necessary or incidental to the incorporation and effective government of the Regional Municipality".

Bill 55 was the legislative vehicle that powered and carried the project on and through its journey to April 1, 2020.

## ii. Committee Process

At an early stage the Co-ordinating Committee agreed that it would meet the first and third Monday of every month – alternating meeting locations between the respective municipal council chambers. The Committee adopted Terms of Reference<sup>8</sup> to provide clarity around Committee decision-making and process. The document expressly adopted the Guiding Principles approved by West Hants and Windsor Councils. The Terms of Reference were amended from time to time over the course of the project.

Professional support for the Committee came from the Chief Administrative Officers of Windsor and West Hants, Louis Coutinho and Martin Laycock, and their staffs. In addition, in February 2019 the Co-ordinating Committee approved a Project Administrator role and subsequently confirmed the appointment of Donna Jones to carry out the role in March 2019. The Project Administrator reported to the Co-ordinator throughout the transition process.

The Province provided \$1.5 million in funding to support the Committee's consolidation work. The financial support was provided under a Funding Agreement<sup>9</sup> entered between the Co-ordinating Committee and the Province in March 2019. The Committee, in turn, developed a project budget which was approved by the Committee in March 2019. In conjunction with the budget, the Committee adopted West Hants' financial policies and procedures to ensure good stewardship and accountability for expenditure of consolidation funding.

As the Co-ordinating Committee embarked on its work, it recognized that the process needed to have the community's understanding and trust. For the new regional municipality to be launched successfully in 2020, the community needed to believe that the key merger issues had been addressed thoughtfully and transparently and that, where necessary, reasonable compromises had been achieved. With that in mind, the Committee decided that all meetings would be open to the public. In fact, not long after getting under way, arrangements were made to live stream Committee meetings by Facebook to optimize public exposure. Meeting agenda packages were posted in advance on the *Stronger Region* website to be publicly accessible. Meeting minutes were also posted on the website. The Committee also agreed that studies commissioned by the Co-ordinating Committee would be made public.

In addition to providing regular budget updates to the Province, the Co-ordinator provided a Quarterly Status Report summarizing ongoing and pending activities for the Minister. The Committee kept the two Councils apprised of ongoing activities through their respective Committee representatives and CAOs. The CAOs also assumed responsibility to communicate with their respective staffs concerning the progress of the Committee's work.

In keeping with the legislative intention, the Committee acted early to recruit a CAO for the Regional Municipality. It was recognized that an early hiring decision would not only help the CAO's orientation for April 1, 2020 but would also provide leadership and support for the Committee in building the new entity. After a national search, Mark Phillips, (formerly CAO for the Town of Kentville), and a 20+ year member of the Canadian Association of Municipal

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<sup>8</sup> Terms of Reference

<sup>9</sup> Funding Agreement

Administrators began his new job on September 16, 2019. Mr. Laycock continued to support the work of the Committee, working closely with Mr. Phillips until the end of the project. Mr. Coutinho also continued as a key supporter until his retirement in December 2019 when Todd Richard (Director of Engineering and Public Works for Windsor) assumed the Acting CAO role until March 31, 2020.

In addition to professional and administrative support throughout the project, the Committee also had the support of personnel from the Department of Municipal Affairs and Housing (“DMAH”). At a very early stage the Co-ordinator and CAOs began meeting regularly with DMAH personnel to discuss work plan and scheduling issues. DMAH staff had the experience of other amalgamations and recent dissolutions to draw upon in helping to devise a winning plan for the launch of W/WH. DMAH received agendas for Co-ordinating Committee meetings and generally made a point to have a representative present for regularly scheduled Committee meetings.

### **iii. Work Plan Approach**

Working together, and with support from the CAOs and DMAH, a Project Work Plan (the “Work Plan”) was developed by the Committee in March 2019. The Work Plan identified critical tasks and scheduling milestones for completion before April 1, 2020. The Work Plan became a regular agenda item for Committee meetings to allow the Co-ordinator to brief the Committee and take questions on progress of the work. A copy of the Work Plan is attached to this report<sup>10</sup>.

Generally speaking, the Work Plan was organized around five key sections which reflected the broad strokes of the areas needing attention:

- a) Regional Government for Windsor/West Hants;
- b) Provision of Services/Infrastructure;
- c) Financial;
- d) Administrative/Administration; and
- e) Making the Change.

Good progress was made from start to finish in each of these categories.

A contract was awarded to Stantec in December 2018 for a governance review of issues surrounding Council size and polling districts. The consultant's report was delivered by mid-April 2019 and formed the basis for the Committee's application to the NSUARB for a Council consisting of a Mayor and 11 Councillors. The Consultant's work was guided by input gathered from an online and hardcopy survey and meetings throughout the two municipalities. Direct survey responses were received from approximately 800 residents. Following a two-day hearing in June 2019 the NSUARB released its decision in August confirming the number of polling districts at 11 and boundaries for the polling districts in accordance with the configuration recommended by Stantec and approved by the Committee.

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<sup>10</sup> Co-ordinating Committee Work Plan

The Committee hired Gerald Walsh & Associates in March 2019 to help determine how best to combine the two existing municipal administrative structures and workforces. By the fall of 2019 the Committee approved an administrative structure for the Regional Municipality and by January 2020, working together with the CAO, made decisions around senior managers and the balance of the workforce for the new entity.

Another consultant, Prime Communications, was retained early on to help develop a public engagement and information strategy. That work included adopting “Together” as the W/WH project brand, relaunching an updated *Stronger Region* website dedicated to the project, having a unified presence at community events and festivals through the spring/summer of 2019, conducting a public engagement survey, publishing quarterly newsletters and maintaining a media and social media presence over the course of the project.

The Committee hired Goudreault Associates to better understand how to bring together municipal and volunteer fire services across the region. By November 2019 the Committee had the consultant’s report and recommendations which were ultimately endorsed by the Committee in January 2020 for implementation by the Regional Municipality. Similarly with RCMP policing services, the proposal received from the RCMP in January, 2020 ultimately formed the basis for policing services under a new Municipal Police Services Agreement approved by the Committee in March 2020.

With consulting support from Hatch Associates, an asset registry was developed for the Regional Municipality that will be essential to understanding the condition of critical infrastructure and associated maintenance and replacement costs going forward. Internal staff expertise was utilized to harmonize financial and accounting systems, planning services and IT platforms for the new entity. And external consultants were utilized to help bring staff benefits and pension plan programs under one roof before April 1, 2020.

With one eye on the future, we recruited a multi-disciplinary team from Dalhousie University’s *Management Without Borders* program to help develop metrics against which the presumed benefits of municipal mergers could actually be measured. Beginning with a clean slate, the students undertook the task with a determination to create key performance indicators, including metrics around quality of life and citizen satisfaction. The result of the students’ work was a municipal benchmarking framework of more than one hundred indicators that broadly includes Governance; Economics, Finances and Taxation; Provision of Services and Infrastructure; Administrative Staff and Structure; and Sociocultural Identity, Demographics and Concerns of Citizens<sup>11</sup>. Through a workshop<sup>12</sup> of Nova Scotia municipal thought leaders in March 2020 the list was narrowed to 11 key metrics that were endorsed by the Coordinating Committee for monitoring going forward. They include tracking GDP, population growth and citizen satisfaction with services against historical performance of the two pre-existing units.

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<sup>11</sup> Dalhousie MWB Team Report

<sup>12</sup> Benchmarking Workshop Report



MWB Team / Standing - William Stevens, Patrick Rooney, Martin Laycock, Todd Richard, Louis Coutinho, Donna Jones, Mark Phillips and Devin Drover. Sitting – Karuna Varakuti, Iliana Irons and Medha Malviya.

The Committee's work under the Work Plan culminated in the municipal elections held on March 7, 2020. The March 7 vote followed intense organizational and planning work that started after the NSUARB's decision in August 2019. The effort was spearheaded by Chief Returning Officer, Rhonda Brown, and Assistant Returning Officer, Shelleena Thornton. The election generated a voter turnout in the range of 50% and saw six incumbent Councillors returned and six new Councillors elected to the first Council of the Regional Municipality. The final official act under the Work Plan was the swearing in of the new Council at the first Council meeting of the Regional Municipality on April 7, 2020.

#### **iv. Project Budget**

The W/WH pre-consolidation work was undertaken and completed within the \$1.5 million funding envelope provided by the Province. The Province's initial up-front commitment was \$500,000, followed by an additional \$1 million allocation announced in February 2019. Funds were advanced pursuant to a Funding Agreement between the Co-ordinating Committee and the Province.

In keeping with the Funding Agreement, the Co-ordinating Committee, guided largely by the work of CAO's Laycock and Coutinho, approved a project budget in March 2019. The Committee accepted West Hants' offer to provide financial and accounting administration for the project funding. The Committee received regular budget updates prepared by Carlee

Rochon, West Hants Director of Finance, in conjunction with Project Administrator, Donna Jones. The Committee, in turn, provided quarterly budget status reports to DMAH.

The final W/WH consolidation budget reconciliation is attached to this report<sup>13</sup>. A summary of the key category expenditures and final accounts is set forth below:

<b>The Region of Windsor and West Hants Municipality Consolidation Budget As of March 31, 2020</b>			
Description	Approved Budget	Expensed to Date	Balance
RFP's	\$538,615.00	\$536,561.58	\$2,053.42
Salaries	\$476,000.00	\$521,695.33	\$(45,695.33)
Professional Services (includes IT)	\$285,000.00	\$154,812.48	\$130,187.52
Administration	\$200,385.00	\$191,300.41	\$9,084.59
Total	\$1,500,000.00	\$1,404,369.81	\$95,630.19

As a final reporting item, the Funding Agreement calls for the Co-ordinating Committee to conduct an audit with respect to the use of project funding. The audit is to be provided to the Province "immediately upon completion". Arrangements have been made for the Regional Municipality to complete and deliver the audit as per the agreement.

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<sup>13</sup> Consolidation budget reconciliation

## VII. MERGER PROCESS – OBSERVATIONS

In the end, how successful was the process culminating in the April 1<sup>st</sup> launch of the Regional Municipality? It's difficult to answer objectively and definitively at this stage but the experiences and feedback of key project players allows for some initial observations and self-assessment.

### i. Bill 55 Model

Mayor Allen and Warden Zebian, their councils, CAOs and DMAH, deserve enormous credit for their leadership. They did their due diligence and concluded that there was a better path to the region achieving its best future. After considering the various options, they concluded the path was through negotiated special legislation.

Unlike the traditional NSUARB route, special legislation allowed the units to control how the consolidation process would unfold. It reduced the need for studies and other fees typically associated with the NSUARB option. As a negotiated process with an end date in 2020, both units had the time and ability to identify and discuss issues relevant to each and ensure that their communities benefited from the intended changes. It was understood that special legislation was not without its own risks. It had the potential to create political pressure for both councils and potential negative impacts on municipal staff. The negotiation process was unknown as were the expectations of both municipal units and the Province which created risks that needed to be understood.

Bill 55 put the ball squarely in the Committee's court to decide what to do and how best to achieve it within the time afforded by the Act. Anecdotal feedback suggests that Committee members and CAOs alike viewed the framework and process provided by Bill 55 as favourable.

In the end, the consensus view is that Bill 55 worked well in this case. Mayor Zebian notes:

"I believe Bill 55 worked as it was intended to work for us. It gave us the framework and mandate to create our unit the way we wished for it to be created."

In this case, the special legislation allowed a sixteen (16) month window to complete the work. Generally speaking, the timeframe was adequate to design and launch the new unit. Depending on the number of parties and complexity of the issues involved, a period of 12-18 months should suffice to undertake and complete a project of this kind.

The special legislation called for a non-elected arm's length individual to chair the Co-ordinating Committee. The Co-ordinating Committee conducted its own RFP process to select a Co-ordinator in accordance with Bill 55. The consensus view is that having the joint responsibility to make that decision was an important step for the Co-ordinating Committee moving forward.

Recognizing the potential for partisan conflict, the insertion of a neutral, honest broker helped the Committee keep a forward-looking focus and facilitate good outcomes around what might

otherwise have been contentious and divisive issues. The fact that the legislation also gave the Co-ordinator authority to vote in cases of a tie also helped to promote Committee give-and-take where stalemate might otherwise have occurred and keep the Committee process moving.

## ii. Work Plan Process

Conventional wisdom suggests “if you don’t know where you’re going, how will you know when you get there?” Without an end goal and clear path, you tend to drift. That was not the case for the Co-ordinating Committee. The project timeline, and particularly the April 1, 2020 start date, left no room to spare.

Adopting a work plan approach to task identification and completion worked well here. The Work Plan template was developed by the Co-ordinator working closely with the CAO’s. It evolved and became more detailed through weekly updates over the course of the project. The Project Administrator kept the Work Plan current in Microsoft Project and distributed updates through the CAOs and DMAH for completion of the assigned tasks.

At any given stage in the process the Work Plan provided a clear picture of tasks completed, work in progress and areas needing future attention. The Work Plan was a useful tool for the Co-ordinator to provide the Committee with updates on the status of ongoing studies and communications. An updated copy of the Work Plan was maintained on the *Stronger Region* website to keep the public apprised of the status of project work.

In Mayor Zebian’s view, “. . . the work plan was well thought out, straight forward and kept us on track on what needed to be done and when it needed to be done by”.

## iii. Immediate Benefits

Only time will tell the real long-term impacts resulting from the 2020 merger. With the benefit of having worked through the process over sixteen (16) months, however, there are early and encouraging signs of the new enterprise getting positive traction. The overarching theme is one of being better able to successfully do more together than either unit would have accomplished on its own.

From a citizens’ perspective, with one government there should be better planning and coordination of core services like fire, police, planning and recreation. There’ll be one administrative point of contact to access those services rather than two for the region.

At the mid-way point of the merger project, Mayor Allen expressed her enthusiasm for the potential outcomes of the venture in an article appearing in *Municipal World*<sup>14</sup>:

“It’s up to us to deliver the best municipal services possible to our residents. I’m very excited about the future here. The possibilities are endless.”

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<sup>14</sup> Municipal World Article

From a governance perspective, council size has been reduced from a total of fifteen (15) elected officials to a combined total of 12 (eleven councillors and a mayor). A corresponding reduction in the council committee structure should help streamline the decision-making process.

From a business community perspective, there's now uniformity of rules, policies and application processes. A host of redundant licenses, permits and approvals has been eliminated. In a post-merger debriefing Mayor Zebian notes:

“The interest being shown now from developers and businesses is at an all-time high.”

With one CAO and a single administrative structure, there will be less duplication of effort, increased effectiveness and more specialized talent. The new administrative structure consolidates financial and accounting services, streamlines pension and benefits plans, payroll processes and eliminates numerous inter-municipal agreements.

From the perspective of municipal employees, there should be more opportunities for training and growth in new areas of municipal administration. The combined region creates more options for specialized talent and the opportunity to work across a broader geographic area. Based on a municipal complex review undertaken by Hatch Associates for the Committee, municipal operations have been consolidated under one roof at the Morison Drive administration building.

From a council perspective, there'll be better opportunity to plan and build a municipality that's financially and administratively stronger, and capable of striving for and delivering more to taxpayers without the former aggravation of competition for investment between the two units. The result should be enhanced economic development with consistent taxation in a stable political environment.

Having a united community naturally creates increased visibility for the region and simplifies relationships with other levels of government. It allows the area to pursue and engage in projects it otherwise would not have been able to compete for.

In a debriefing at the conclusion of the project Mayor Zebian was optimistic about W/WH's capabilities:

“In regards to COVID 19, if we were separate units, I believe both would be needing major help to get through this difficult time. Since we combined all our resources, we have the staff power, finances, and capabilities to manage this difficult time more efficiently and with less burden than if we were separate. We also have one, unified message rather than two conflicting messages.”

Minister Porter echoed that sentiment in a May 8, 2020 letter to the Committee<sup>15</sup>. He says:

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<sup>15</sup> Letter dated May 8, 2020 from Minister Porter

“It is not every day that two municipalities voluntarily agree to consolidate into a new municipal unit. In fact, it has happened only once in the history of this Province: the formation of the Region of Queens Municipality in 1996. The magnitude of your accomplishment in this regard cannot be overstated. Your efforts will have a lasting positive impact on, not only the residents of the new Regional Municipality, but on the Province of Nova Scotia as a whole.”

#### iv. Community Engagement

Finding regular and various ways to engage the public was critical to the success of the project. At the project conclusion, Mayor Allen observed:

“Communication to the public was very important right from the beginning. I believed they were well informed given that the internet was not a broad option for all residents.”

The focus on providing good public information and opportunities for citizen engagement was a constant throughout the process. The Work Plan identifies and describes in detail the various features of the Committee’s communication plan (particularly under Part IV Making the Change). While the citizen engagement factor manifested itself in many ways at different times, it is probably best illustrated through the following three aspects of the project:

1. **Meetings throughout the two municipalities between February – April, 2019 soliciting citizen feedback on council size and polling districts.** In its decision the NSUARB<sup>16</sup> noted Mr. Heseltine’s observation during the hearing that “the number of responses to the survey, and attendance at public meetings, was the best response he has seen in his prior municipal boundary engagements”. The Board said this was consistent with the Board’s own experience in municipal boundary reviews.
2. **The response to the Committee’s public engagement survey<sup>17</sup> conducted between April – October 2019.** In undertaking the survey, the Committee set a goal of achieving 1,000 responses to the survey. The total response exceeded that goal. Most respondents believed that the consolidation would be beneficial for the region.
3. **Through the municipal elections conducted between January – March 2020.** The Committee set a goal of achieving 55% voter turnout. The March 7<sup>th</sup> results fell short of that objective but proved respectable for a winter election and surpassed the previous turnout in West Hants. The election generated interest from new candidates wanting to run for council. In fact, six of the twelve new council members are first time councillors.

Clearly, much remains to be done to bring the two former units together. The work has really only just begun. Having said that, much was accomplished over the span of sixteen (16) months through good communications to open a dialogue in support of the work of the Committee. In fact, in Mayor Zebian’s view, this was one of the areas where “the benefits of

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<sup>16</sup> NSUARB Decision

<sup>17</sup> Public Engagement Survey Report

consolidation began immediately”. In his view, the community really started to “come together” through the process.

## VIII. KEY LESSONS & RECOMMENDATIONS

Not surprisingly, there are many learnings and interesting takeaways from the W/WH experience – political, administrative and otherwise. In the interests of brevity and clarity the key comments are summarized below having regard to (i) potential improvements to the Co-ordinating Committee model and (ii) making more effective local government more accessible to other units considering their options for a better way forward.

### i. Co-ordinating Committee Model / Process

**CAO hiring:** from a project staffing standpoint, the existing CAOs in this case did double duty, performing CAO roles for the existing units while supporting the work of the Co-ordinating Committee. Bill 55 provided for the hiring of a CAO no later than January 2020. In this case, the CAO was hired in September, 2019. Our experience suggests the earlier the better. Bringing the CAO on early takes pressure off the existing CAOs and gives the CAO a direct hand in shaping the new administration, particularly as it relates to human resources and staffing.

**Project Administration Support:** The Act is silent on any administrative support beyond the Transition Co-ordinator. Bringing on a dedicated part-time Project Administrator in March 2019 was critical to the overall success of the project. The Project Administrator provides invaluable support with regard to scheduling, preparation of agenda packages, minutes, maintaining the Work Plan, etc. Ideally, the Project Administrator position should be established and a candidate hired following appointment of the Co-ordinator at the outset of the project.

**Other key professional support:** Effective communication from start to finish is critical. Managing the HR side of the equation is also tricky (both with respect to combining existing administrative structures and staffing the new organizational chart) and needs to be handled with care. It would be beneficial to have dedicated communications and HR support available from start to finish on this type of project.

**Co-ordinating Committee Composition:** The Act creates a Co-ordinating Committee consisting of four (4) elected officials plus the Co-ordinator. That size and composition worked reasonably well in our case. The Act also provides for two “alternate” members of the Committee. The Act stipulates that the alternates are to serve when regular Committee members are not available. Whether called upon as a regular Committee member or alternate, the expectations of Committee members are high and the work is time consuming. Potential Committee members should go into the role with an understanding of what’s involved. It would be beneficial to have a job description available in advance for Committee members and alternates so the time and responsibilities are clear and individuals can decide whether they want to take it on.

**CAO and Staff Support:** We were fortunate to have talented and dedicated CAOs involved from start to finish. As it turned out, neither of the existing CAOs competed for the new CAO

role. There was no risk of conflict or competition between the two existing CAOs with respect to the new CAO opportunity. That might not always be the case in merger scenarios. Depending on the circumstances, consideration should be given to how best to retain the institutional knowledge and experience of existing CAO's while transitioning to a new entity with potentially new CAO leadership.

**Governance Review / Public Consultations:** While public consultations were largely successful, rural residents initially contended that poor internet access in these communities jeopardized participation in the on-line survey. Steps were taken to adjust the survey process to accommodate those concerns but execution of the supplementary survey work was less than optimum. Notwithstanding the positive outcome of the boundary review component, future processes should be vigilant about following proper survey practices. The consultant should be directly engaged in all facets of seeking, obtaining and compiling survey results to ensure accuracy and reliability.

**Election Process:** The successful conduct of municipal elections is a critical component of launching the new municipality. Every effort should be made to make it attractive and easy for citizens to vote. In our case, one unit had experience with electronic voting, the other did not. Time simply didn't allow adequate opportunity to develop a platform for electronic voting across the whole region. It would be beneficial – to have a common platform and promote stronger voter turnout – to conduct the elections by way of electronic voting. Consideration should be given to how that might be accomplished.

**DMAH Support:** Support from DMAH was a constant factor from beginning to end. It originally came in the form of a committee consisting of a number of DMAH personnel – some of whom transitioned to other roles and responsibilities over the course of the project. Ideally, the Committee would have one or two dedicated senior support personnel from DMAH assigned to the project from start to finish.

**Troubleshooting:** It's always difficult to know where the challenges or trouble spots will lie. The Committee addressed an unforeseen potential budgetary pressure from CRA in respect of HST rebate (still pending a final ruling by CRA). Dealing with CUPE successor rights issues involved more time and consideration than anticipated. Addressing how best to bring the two workforces together was also a significant undertaking for both the external consultant and the CAO's. Determining the best contractual model to secure cost-effective RCMP policing for the region presented significant unanticipated challenges which were ultimately resolved by the Committee working with the Province. The Committee's experience suggests that despite best efforts to anticipate the trickiest political or administrative challenges, contingencies must be made to address the unexpected and unforeseen on a project of this magnitude and short duration.

**Timing is everything:** The launch date for the Region of Windsor and West Hants was April 1, 2020 – leaving approximately sixteen (16) months to complete the project. As previously noted, this proved to be sufficient time to construct and launch the new unit in this case. Administratively, however, there are matters associated with final reporting (i.e. concluding final accounts, organization and transfer of project documents, etc.) that would favour extending the mandate of the Committee (or at least the Co-ordinator and Project

Administrator) for 30-60 days beyond the official launch date for completion of those wind-up tasks.

**Project Budget:** DMAH consolidation funding support was critical to the Committee mandate. Provincial funding was confirmed in February 2020. Ideally, the Funding Agreement and necessary resources would be established before commencement of the project.

**Naming:** The Act placed responsibility for naming the new unit with the new council. That would be the preferred approach. While it was not seriously problematic for the Committee, in retrospect public communications around responsibility for and timing of choosing a new name could have been clearer from the outset and throughout the process. That would be in keeping with the Committee's principal role of constructing the new entity to place in the hands of the new council to brand and operate as a going concern.

**Council Role:** This process benefited from both councils having voted to conclude a timely merger of the two units. In theory and in practice, the two councils expressed themselves through the process via their representatives on the Co-ordinating Committee. Various methods were used to try and keep council members informed regarding the Committee's work. Generally speaking, the councils were understanding and supportive of the work of the Committee. Communicating effectively with the councils is critical to maintaining the support of those who are committed to the success of the journey.

## ii. Legislative and Other Opportunities

**Political Leadership Critical:** One of the most telling aspects of the W/WH experience is that the council leadership that opted for merger carried the project to its ultimate conclusion in April 2020. Having knowledgeable, forward-looking, consistent political leadership through the entire process, from the MOU to the Guiding Principles to the Co-ordinating Committee to the launch of the new unit, is an essential component of a successful merger. The Act in this case called for the Warden and Mayor and their respective deputies to serve on the Committee. The combination may be different in future cases but, in any event, the Warden and Mayor (or whatever the applicable case may be) should form part of a Co-ordinating Committee established under special legislation.

**Guiding Principles/Alignment:** As noted above, the merger was preceded by a joint MOU and a set of Guiding Principles adopted by the two councils. The Guiding Principles created a shared vision on how the Regional Municipality would be constructed and emerge from the work of the Co-ordinating Committee. The Guiding Principles heavily influenced the decision-making of the Committee and gave staff and the citizens the assurances necessary to keep an open mind about the merger work. For instance, with respect to the administrative structure, the Guiding Principles stipulated that "all efforts should be taken to ensure there is no job loss as a result of the consolidation". With regard to a taxation model, the Guiding Principles adopted the existing tax system as a base and stipulated that area rates should be used "to ensure that repayment of the debt is paid in the spirit it was incurred". The Guiding Principles set the tone and direction for the Co-ordinating Committee's work and were a touchstone for decision-making at both the Committee and administrative levels throughout the project.

**Standing MGA Option:** Bill 55 was the best course for W/WH. It gave local government leaders broad discretion to make their own local decisions around council size, administrative structure and service delivery issues. It put the pen in their hands. With the benefit of various studies on pertinent issues, the Committee was able to make evidence-based choices on restructuring issues with clear expectations around anticipated outcomes and how best to manage them. The model worked extremely well here. The MGA presently allows municipalities to make application to the NSUARB to amalgamate or dissolve or annex another unit. Consideration should be given to adapting a Bill 55 model with an appropriate opt-in mechanism as a standing option under the MGA for interested parties. It could prove to be an attractive self-help option for other units wanting to come together.

**University Collaboration:** The Committee partnered successfully with Dalhousie University on several fronts on the project. Professor Jamie Baxter of the Schulich School of Law was retained to prepare a literature review to support the Committee's application to the NSUARB to determine council size and polling district boundaries. A student team from Dalhousie's *Management Without Borders Program* worked with the Committee to develop benchmark indicators to measure the success of the merger beyond April 1, 2020. And, after receiving responses to its Public Engagement Survey, the Committee reached out to Derek Reilly at Dalhousie for assistance in compiling and summarizing the survey results. Nova Scotia is blessed with many fine universities with expertise in business, public policy and administration. The Committee's success in partnering with Dalhousie highlights the opportunity that exists for the university sector and local government to collaborate in building stronger local government and, in so doing, a stronger Nova Scotia.

**Unfinished Business:** One of the more instructive documents coming out of the Committee's work is the report on the public survey results gauging people's opinions on the amalgamation. It captures not only popular perceptions of the benefits and challenges of consolidation but also people's views on the immediate priorities of the consolidated municipality. It's noteworthy that respondents deemed improvement of transportation infrastructure to be the top priority. The second priority was creation of a fair tax system. The third priority was improvement of municipal services, with a notable interest in having improved rural access to the internet. These priorities will undoubtedly be top of mind as the new council develops its own business plan to shape the future of the new unit. The report's analysis – based, as it is, on feedback from the broad rural/urban region – may also be a useful resource for other local governments charting a future path.

**Shared Learnings:** There's a great deal that's instructive in the studies conducted by the Committee (all publicly available) which should be beneficial for other communities in Nova Scotia. For instance, the Asset Registry report contains a comprehensive analysis and recommendations around leveraging the combined critical infrastructure of the new region. The fire services study is instructive on how best to organize and combine rural and urban fire to better serve citizens on a regional basis. The RCMP's servicing report considers how to restructure a policing complement to address combined rural and urban needs under one roof. While these studies were undertaken principally for the W/WH scenario they should stimulate thinking and consideration of alternate approaches that may be attractive in other settings.

**Long-Term Proposition / Measuring Success:** There is a saying, “if you can't measure it, you can't manage it”. The results of Dalhousie’s MWB Team study and the Committee’s benchmarking workshop confirm the importance and value of measuring the outcomes of mergers. Assessing the results based on empirical data will help to eliminate speculation and uncertainty around the benefits accruing from consolidation. W/WH is now well-positioned to do so. The Committee endorsed a set of benchmarks for the new council to follow. It should do so, quite possibly with further support from Dalhousie. Other units are similarly well-positioned to assess and adapt their performance based on the same toolkit. The citizens of W/WH have every reason to expect that answers will be available in three, five and ten years’ time around whether the merger was a success.

## IX. CONCLUSION

Council led mergers are rare. While W/WH is only now beginning to chart a new path as a unitary political entity, the Co-ordinating Committee's experience suggests local government – working collaboratively with the Province – can take responsibility for shaping its own best future.

The principal mandate of the Committee was to construct and implement a governance structure for the new regional municipality. A number of factors help explain the success of the mission. First, with both the Warden and Mayor committed to the chosen destination, supported by their respective Councils, we had a common vision for all those who wished to join the journey. Second, the Guiding Principles adopted by the councils pointed the way and guided the decision-making process at every turn. Third, Bill 55's statutory decision-making model, while not perfect, was conducive to developing and executing an ambitious Work Plan in a relatively short period of time. Fourth, through robust public engagement that's only possible within a democracy, we thoughtfully and transparently considered and decided key issues affecting the future of those who live and pay taxes in these communities. Fifth, strong and capable CAO leadership with associated administrative and DMAH support was a constant throughout.

As chair of the Co-ordinating Committee, I went into this exercise believing that friendly municipal mergers like this are highly desirable. With the benefit of the W/WH experience, I'm persuaded that strong regional governments that offer superior services are more likely to attract investment, create jobs and spark economic renewal. I'm convinced that the fabric of rural and urban Nova Scotia is closely interwoven, that what unites the two is far more significant than what divides them. I'm also confident that issues around historic relationships and local identity can be accommodated in new more financially-secure municipalities.

Councillor Rupert Jannasch, representing a rural area of West Hants and an alternate on the Co-ordinating Committee, admitted that he had doubts about the process and the result. But, he was a regular meeting attendee and gradually came to believe the process and outcome were worth the effort. He says: "Being part of this process certainly opened my eyes to the potential of where we could take this."



Councillor Rupert Jannasch and Co-ordinator Kevin Latimer  
Photo by Colin Chisholm

Recent events have reminded us that we face challenges and opportunities of historic magnitude in Nova Scotia, in large part because we live in a global and more competitive world. Some of what we face is well beyond our control. Municipal government is decidedly within our control.

What will this region be 5-10 years from now? Let's acknowledge that the road ahead will not be smooth or straight. But, if experience is the best teacher, there's every reason to believe these communities will continue to evolve for the better because of the courage of the two councils to choose and forge a better future together.

DATED at Halifax, Nova Scotia, this 3<sup>rd</sup> day of June, 2020.



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Kevin Latimer, Q.C.  
Transition Co-ordinator

**X. APPENDICES**

1. ARC Application to NSUARB;
2. Windsor/West Hants Councils' MOU;
3. Letter dated February 22, 2018 from Minister Mombourquette to Mayor Allen and Warden Zebian;
4. Requests from councils to Minister of Municipal Affairs;
5. Bill 55 - *Region of Windsor and West Hants Municipality Act*;
6. Guiding Principles;
7. Order in Council for Co-ordinator appointment;
8. Terms of Reference;
9. Funding Agreement;
10. Co-ordinating Committee Work Plan;
11. Dalhousie MWB Team Report;
12. Benchmarking Workshop Report;
13. Consolidation Budget Reconciliation;
14. Municipal World Article;
15. Letter dated May 8, 2020 from Chuck Porter;
16. NSUARB decision; and
17. Public Engagement Survey Report.

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**IN THE MATTER OF:**

An Application by the Citizens of the Municipality of the District of West Hants, the Citizens of the Town of Windsor, and the Town of Windsor for a Preliminary Order of Amalgamation of the Municipality of the District of West Hants and the Town of Windsor

**APPLICATION FOR A PRELIMINARY ORDER OF AMALGAMATION**

The Citizens of the Municipality of the District of West Hants ("West Hants") and the Citizens of the Town of Windsor ("Windsor"), hereby apply under **section 358 of the *Municipal Government Act ("MGA") - Citizen led amalgamation process*** for a preliminary order for amalgamation of West Hants and Windsor. The Town of Windsor has enjoined with the citizens' group in support of this application.

**A. Boundaries**

The area proposed to be amalgamated constitutes the existing Municipality of West Hants (including the former Town of Hantsport) and the existing Town of Windsor, the boundaries of which are contiguous. See Addendum, Item 1, for the map of the area in question.

**B. Population**

The estimated population of Windsor is 3,785. The estimated population of West Hants is 15,324. Accordingly, the population of the amalgamated units would be approximately 19,109.

**C. Assessments**

Windsor	
01 Residential Taxable	\$ 168,967,500
02 Commercial Taxable	\$ 49,659,700
03 Resource Taxable	\$ 564,200
Total Taxable	\$ 219,191,400

West Hants	
01 Residential Taxable	\$ 864,584,300
02 Commercial Taxable	\$ 46,885,800
03 Resource Taxable	\$ 31,686,400
Total Taxable	\$ 943,156,500

**D. Village Financials.** Audited financial statements of any village within requested amalgamated area. This is non-applicable, as there are no villages within this area.

## E. Reasons for Application

Amalgamation would be in the best interests of inhabitants of both West Hants and Windsor, taking into account all financial and social implications. As shown by the results of the petition drive, an action led by the citizens' group, Avon Region Citizens ("ARC"), the citizens of this area are of the belief that it is over-governed and should pursue the recommendations put forth by the Ivany Commission, (One Nova Scotia Report), including reduction of municipal units through amalgamation.

ARC's Mission Statement is, "to promote and produce the best possible municipal government for the citizens of Windsor and of West Hants." This committee has researched all options available (Regionalization, Annexation, Dissolution, and Amalgamation) in consultation with the Department of Municipal Affairs. Upon completion of this due diligence the committee reached the opinion that amalgamation for Windsor and West Hants is the action that is in the best interest of the residents of both municipal units.

Dysfunctionality between the two governance units was the impetus for citizen discontent that was captured by ARC's petition drive, beginning in the fall of 2015, with over 18% of the citizens signing to request this action. Specifically, 2155 signatures of 11,888 electors were received from West Hants and 497 signatures of the 2350 electors were received from Windsor.

Signatures on the petition were collected individually and the collectors found that, while some citizens requested time to discuss with spouse or for further study, an overall positive response was received from ninety-five percent of those approached, which is a statistically significant response. Signatures were received from all areas of West Hants, including its newest area, Hantsport. It is the opinion of ARC that there is a clear and overwhelming mandate by the citizens of both municipal units for the amalgamation of both municipal units into one unified governance unit.

**Our request of you:** ARC is forwarding the citizens' request for a preliminary order for amalgamation of said units, made pursuant to Section 358 (c) of the MGA which states *"Municipalities may be amalgamated or the whole or part of a municipality may be annexed to another upon application to the Board by the greater of ten percent or one hundred of the electors in the area proposed to be amalgamated or annexed. 1998, c. 18, s. 358."*

Your approval of this request will provide for the following benefits, thus the reasons for amalgamation:

- 1. A Respectful Merger of the Two Units.** There has developed, over time, a general mistrust between the two existing municipal units. A result of this has been two independent units that do not work in concert for the benefit of the citizens of the area. This discord between the two municipal governance units has created an atmosphere where no measurable cooperation is anticipated that

would lead to a remedy the citizens of this area have deemed necessary. Neither unit will accept being the object of a dissolution or an annexation; hence amalgamation remains the acceptable approach to bring the units together.

2. **More Efficient Governance Through Elimination of Duplication.**

Amalgamation would end the duplication of effort inherent in two separate municipal governments operating in contiguous territories. Administration, service departments and operational agencies could consolidate into one, resulting in decreased costs, and increased efficiencies.

West Hants and Windsor currently have a combined population of approximately 19,000. This population has a total of 15 municipal representatives (one serving interim member due to Hantsport dissolution), and two separate administrative regimes. Amalgamating the units would eliminate this duplication, and put into place one Council and one set of municipal departments and authorities, with jurisdiction over the entire unified area.

3. **Life Style Continuity.** Windsor is surrounded by West Hants and the amalgamation would allow for continuity in the management of this contiguous space through governance by one Council.

With Windsor at the core of West Hants, a significant portion of the municipality is indistinguishable from the town. Services located in Windsor are used by the residents of West Hants. These services include retail, social, recreational, educational, medical, governmental, and financial services. See Addendum, Item 2, for a more detailed list of these offerings. These services are accessed and used by all within Windsor and West Hants. What the citizens of both West Hants and Windsor have in common is significantly greater than what separates them - a municipal boundary.

4. **Elimination of Cross-Border Contention.** Amalgamation would bring an end to the current expensive and counterproductive governance model that has overseen a myriad of civic issues between these municipal units.

West Hants and Windsor have been involved in a number of disputes for some time concerning such things as roads, fire and emergency protection services, recreational matters and development issues.

A specific and significant example is demonstrated by the fire protection and emergency services issue that has been on-going for several years. Numerous meetings have been held in Windsor and in West Hants and, at every meeting, the citizens of Windsor and West Hants have voiced their strong opinion that they were very satisfied with the fire protection and emergency services provided by the Windsor Fire Department ("WFD") and their contract with West Hants. The West Hants Council ignored the wishes of its constituents and proceeded to develop their own separate, decentralized service with temporary leased facilities

at Tongue Hill with a proposed permanent fire and emergency center.

A considerable amount of time, energy, and resources has been expended by both units to protect (or promote) their respective interests. Amalgamation would surely put the interests of the residents first and dispense with this wasteful, unnecessary and unwanted process. Cross-border conflicts on many issues were significant motivations for submission of this application from the electors of this area.

5. **Financial Stability.** A municipal unit with 19,000 inhabitants, and the associated number of ratepayers, would be in a much better position to achieve economies of scale in procurement of goods and services when governed by one municipal unit.
  - a. **Administrative expense stability.** Fiscal savings will undoubtedly result from moving to one CAO and one financial officer with support staff appropriate for one administration instead of two.
  - b. **Infrastructure expense stability.** One municipal unit for the entire area will provide for the elimination of duplication of infrastructure spending in areas of fire and emergency services, waste water treatment, and all other common municipal infrastructure.
6. **Tax Rate Stability.** It is the expectation (and understanding) of those supporting this petition that, should the UARB agree that amalgamation is in the best interest of the citizens of this region, there will be area rates used to retain tax rates as they exist presently. We respectfully request that, when considering these area rates, the UARB give consideration to current local area rates, current local service rates, and current shared services. Further, a review of these current shared service services should be completed to ensure for fairness in their allocation. It is preferred that these charges be determined following cost accounting allocation principles for both annual expense allocations and annual capital cost allocations for the specific area rate, service rate, and current shared services costs.

The citizens of West Hants are hopeful that this amalgamation application will delay unnecessary expenditures, including new debt issuance in West Hants, from being approved until such time as a decision on the application has been made.

7. **Unified Request for Government Services and Resources.** An amalgamated entity would be able to present a united front in dealing with senior levels of government, instead of competing for governmental services and resources, as occurs with the existing governance model for this area. At present, there are two separate and competing municipal units. When, for example, the federal government makes infrastructure funds available, both Windsor and West Hants prepare priority lists of projects, without regard to the other's plans or actual

needs. An amalgamated unit would end this counterproductive competition and establish priorities for the whole area. Additionally, one municipal government could present a unified voice in all dealings with provincial and federal governments.

8. **Greater Negotiating Power with Vendors.** An amalgamated entity would be able to present a unified front in dealing with vendors. Theoretically, there should be greater savings realized by approaching vendors with a larger base to be serviced. This would hold true for contracted critical services such as Fire and Emergency Services, and Waste Services, as well as for services and supplies to support the day-to-day operations of the municipal unit.
9. **Vision and Growth Continuity.** Amalgamation would allow for consistent and coordinated efforts in economic and land use development, planning and subdivision. It is a given among developers that Windsor and West Hants have become toxic for business development in light of their present dysfunctional working relationship. By combining these two units there would be new focus placed on the development of a growth plan for the entire region, without concern for existing boundaries.

Cooperation on issues of municipal economic development between West Hants and Windsor is virtually nonexistent. An amalgamated unit would be in a position to plan and seek development with all of the resources of a unified area at its disposal. Amalgamation would also result in the consideration of one set of planning policies that would encourage land use without the discord between the competing policies of the present adjacent municipal units.

The sustainability of this area relies on attracting new outside investment, additional long-term residents and improving the quality and number of assets the area has to offer. With the steady decline of financial stability, stable employment, population size and quality of life in rural Nova Scotia, competing agendas from smaller municipalities is inhibiting the future growth and welfare of rural governing bodies. Modifying the local governance model is an essential step for the area to move forward.

10. **Consistent By-Laws and Policies.** Amalgamation would eliminate any conflict between inconsistent by-laws or policies. West Hants and Windsor presently each have their own regime of by-laws on a wide variety of matters, some of which are in conflict. It would be in the interests of the residents of both units to have, where appropriate, one uniform set of laws and policies.
11. **Alignment with Goals Outlined by Ivany Commission.** Goal # 18 "*Reform of Municipal Government and Regional Service Structures*" by the Ivany Commission (One Nova Scotia Report), clearly delineates the need for a severe reduction of municipal units in this province. According to Ivany, prime objectives for restructuring should include:

- *Greater service efficiency and improved “value for money” for taxpayers,*
- *A critical evaluation of the fairness, effectiveness and sustainability of the current distribution of service responsibilities between the provincial and municipal levels,*
- *Greater engagement of communities with regard to economic development planning,*
- *Improved incentives for entrepreneurship,*
- *The integration and streamlining of services to business,*
- *Reductions in regulatory burden, and*
- *The better alignment of tax policies with economic growth objectives.*

The citizens of this region are of the opinion that these goals will be achievable if amalgamation occurs. The prevailing belief is that without amalgamation, **none** of these goals will be reached!

Further, all representatives of the Municipal Affairs Department, from advisor to director to Minister, accept their mandate to foster the reduction in municipal units in Nova Scotia.

#### **F. Such other matters relevant to the application.**

**Why is this request not unanimous?** The reason stated by the West Hants Council for not participating in this effort was that they felt they needed more time to analyze the effect of the Hantsport dissolution. The motion read, *“MOVED and SECONDED that it is premature to consider amalgamation with the Town of Windsor, and that the Municipality is not agreeable to contributing to the cost of studies relating to such an application.”*

It should be noted that Windsor Council has voted to participate in this application, having championed amalgamation for well over a decade. It has promoted the positive benefits of amalgamation to the Provincial Government, local Members of the Legislative Assembly and the Councils of the former Town of Hantsport and the Municipality of the District of West Hants. In addition, promotional efforts have involved citizen joint planning groups, local business associations and residents at large using sponsored speakers and public panels.

See Addendum, Item 3, for a brief summary illustrating Windsor’s efforts to promote amalgamation and regional cooperation.

While Windsor has been an active proponent of amalgamation for years, they recently voted to participate in this application with the caveat that they not be charged for the entire cost of studies related to this process. All participants believe that historically, cooperating units are supported by provincial funding for these efforts. In this case,

three of the four possible participants (Citizens Petition from Windsor, Citizens Petition from West Hants, and Town of Windsor) are in agreement to this effort and there is a general belief that some accommodation should be made by the province to provide the funding required to support this initiative to its desired conclusion. This would actually be an investment in the future of rural Nova Scotia, not a financial liability.

1. **Citizen concerns regarding West Hants Council activities.** West Hants is acting without accountability to its citizens. Numerous statements made by its councilors and examples of their contempt for citizen input abound. Below are examples intended to support our contention that this Council is not exercising good judgement in making decisions that impact the welfare of their citizenry.

The West Hants Council voted against the wishes of the citizens of West Hants on amalgamation. This places the West Hants Council as the sole barrier to a successful implementation of this application.

- a. **Fire and Emergency Services.** The decision by the West Hants Council to de-centralize the fire and emergency services (both equipment and volunteers), is an action that runs counter to citizen wishes and normal logic when faced with the absence of sufficient growth in the need for services to support such expansion. There is a general dismay among the residents of this area regarding this series of decisions. This area held their existing fire service provider (WFD) in high regard and generally sees no justification for actions taken by West Hants regarding this issue. Further, the decisions of the West Hants Council will soon have a negative impact upon the tax rate of the citizens of West Hants. These decisions have provided slower response times, fewer trained volunteers available, and significantly greater expenses incurred by citizens where their homes fall within a higher insurance risk rate area due to these new service providers. Justification for these actions has never been provided, nor has there been any explanation as to why the citizens should accept the new terms of service, when the existing terms of service were measurably superior to the replacement service. See Addendum, Item 4, for public comment on the potential final cost of these decisions. To date, roughly \$2.6 million has been expended on fire trucks, training, and equipment.
- b. **Council is rushing to initiate the building of new fire station(s) before their terms in office expire.** The council is now pressing for a rapid building of one or two fire stations to support their de-centralized services model. It is the desire of the citizens' group that this effort be delayed until the coming election and/or the amalgamation effort can readdress this spending spree. If there were a recall action available to the citizens of this area, there is NO DOUBT that this would have occurred already. This application is the sole option available to the citizens of this area who feel as though the West Hants Council can no longer be entrusted with the responsibility for the fiscal well-being of West Hants. See Addendum,

Item 5, provides documentation regarding the Council desires to rapidly pursue development over the concerns of the CAO.

2. **Recommendation for improved governance.** Our citizens' observations of "a loss of the democratic process" within the West Hants Council, described more pointedly by some as a "mistrust" of the process, is deeply worrisome.

Our efforts must be directed to find a solution to these issues. There is a mistaken belief that the voter can effect correction through the election process. But one knows well that systemic codes of entitlements are not so easily overcome without higher authorities imposing good governance practices.

Specifically, it is our belief and the belief of respected writers and authorities that the existing council governance structure itself is flawed. The position of Warden and how that position is filled is not conducive to good governance. Presently, Wardens are nominated by a newly elected council following their election to office. A specified number of elected Councilors, each having the duty to represent the interest of a District, sit together to choose from amongst their number one District representative to lead all future meetings of Council and to act as the voice of the Municipality to the public. This process, by the very nature of its origin, creates a 'campaign' pitting one against the other until one lobbies adequate support to prevail. There then exist two 'interests' at the table: those who voted 'for' the Warden and those who voted 'against' the Warden. Thereafter, in an attempt to create universal equality of benefit and representation throughout the Municipality, we have failed. The "For" Party benefits while the "Against" Party is at a disadvantage. Further, the spokesperson for Council – the Warden, controls the messaging to the public.

Expressions of opinion by the UARB have persuasive and lasting impacts on the future conduct and direction of Councils. It is respectfully requested that, at very least, you provide comment on this subject in your published opinion.

We believe there is another solution that eliminates this opportunity for the misuse of power by a warden. We have researched potential solutions to this systemic problem and respectfully present the following for your consideration

- a. Select the proper number of Districts (or Council seats following an amalgamation) and ensure that community of interest guidelines are followed when drawing up the voting districts. This is common good practice in place now.

- b. The proper number of seats would be recommended by an independent consultant as part of the amalgamation process and could total either even or odd numbers. Each district would elect one member following current rules and process. Hopefully, the number will be more economical, that is, less than the sum of all current council members.
  
- c. Make a provision for one additional council member, who would be elected at large to the position of "Independent Council Member – Chair/Leader" (Mayor). The leader would chair council but would vote on every motion. This will ensure that council, regardless of odd numbers or even numbers, makes a democratic decision. This would also ensure that an "Independent Council Member", elected at large, has a measure of independence and is not, in his or her position, beholden to or at the pleasure of any defined group of council members.

This recommendation has been provided because, under the MGA, it is not automatic for the position of mayor in anything other than regional government. West Hants does not represent a complete county. Having a mayor, elected by everybody, given that there will be a reduction of the number of councilors, provides the citizens another person who can represent them regardless of what district they reside.

To conclude, this is a positive recommendation that has been recently employed in other NS communities. This recommendation would allow for the reversal of a systemic flaw and provide a chance for positive democratic changes. This approach allows West Hants to have a single person chairing meetings, elected at large, who can vote but will be voting on behalf of all residents/voters in the Municipality.

- 3. **Concluding Remarks.** A purpose of amalgamation is to aid in the moving of municipal governments to be more effective, more accountable, and more capable of driving economic development without bumping into other (unnecessary) municipal silos.

The citizens of this area have presented the UARB with their plea for assistance in ensuring a more efficient, unified, and responsive municipal governance to their area. Beyond all of the obvious administrative benefits to consolidating these two municipal units, looking to the future to ensure a more sustainable, transparent and effective local government is key for the growth of the Windsor/West Hants area. This will keep the area in step with the

recommendations of the Ivany Report and move us forward to the obvious solutions needed for rural Nova Scotia to survive.

Thank you, in advance, for responding to our request for assistance. Hopefully, this will add the needed degree of clarity that we see as essential for the future of the Windsor/West Hants area.

ADDENDUM(S)

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A. Map of Windsor / West Hants

# Municipality of the District of West Hants

## Existing Polling Districts



Prepared by:  
West Hants Planning Department  
November 2015

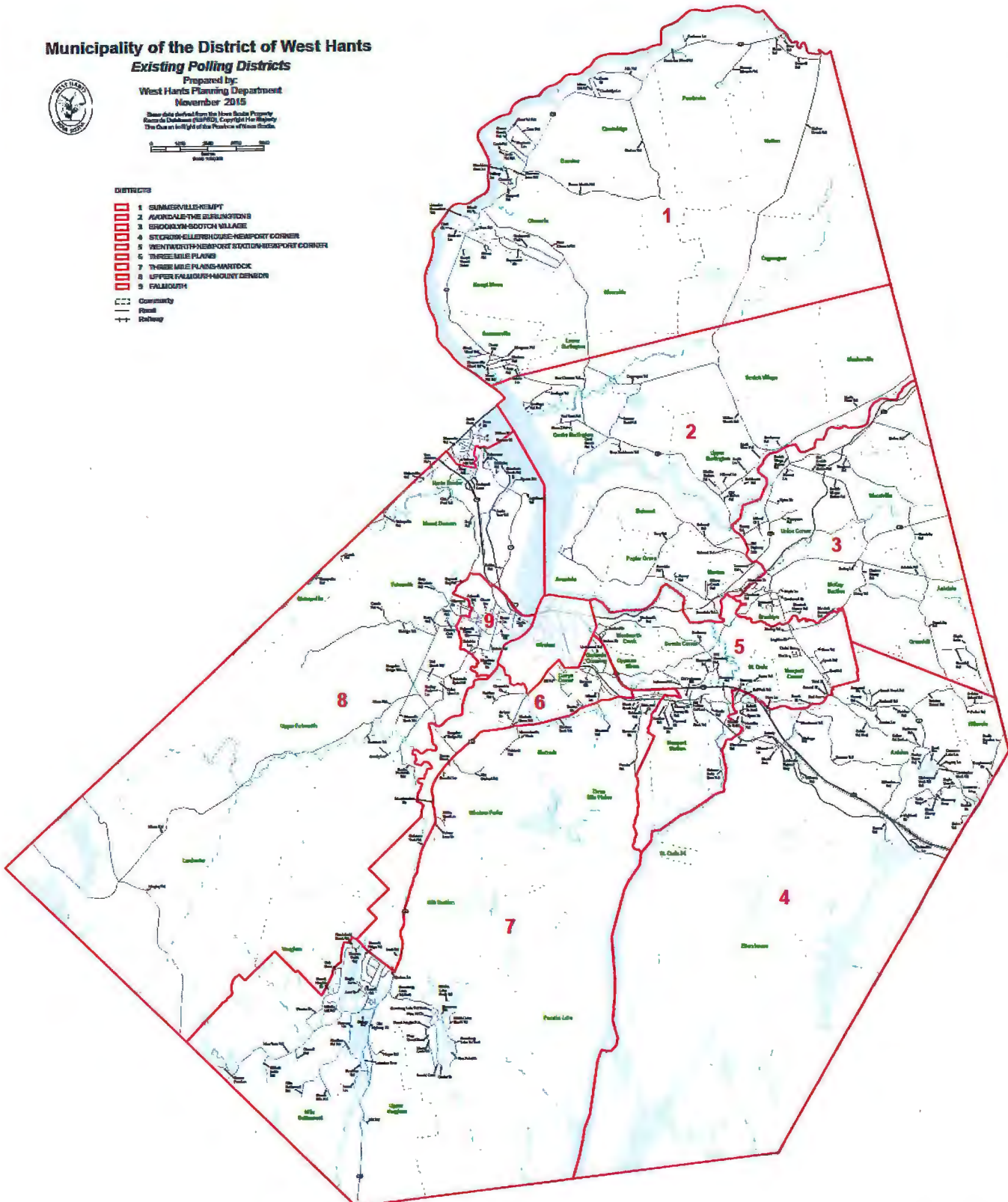
Base data derived from the Nova Scotia Property  
Records Database (NSPRD), Copyright Her Majesty  
The Queen in Right of the Province of Nova Scotia



**DISTRICTS**

- 1 SUMMERVILLE/HEMPY
- 2 AVONDALE-THE BURLINGTONS
- 3 BRIDGEMAN-GOITCH VILLAGE
- 4 STOKROY-ELLERHOUSE-NEWPORT CORNER
- 5 TWENTY-TWO POND/PORT STATION/NEWPORT CORNER
- 6 THREE MILE PLAINS
- 7 THREE MILE PLAINS-MANTOCK
- 8 UPPER FALMOUTH-MOUNT DENISON
- 9 FALMOUTH

- Community
- Point
- Highway



## B. List of Windsor Offerings

## Appendix B

The Town of Windsor is the core area for the County of West Hants and houses a number of community facilities such as:

- a Community Centre,
- an Aqua-Centre for outdoor swimming,
- Exhibition Arena for Skating and Ice Hockey,
- Exhibition Grounds and buildings for hosting North America's Oldest Agricultural Fair,
- Canadian Legion,
- the Windsor Fire Department (WFD) a first rate fire protection and emergency service,
- several museums (Provincial and National),
- a skate board park,
- curling club
- playgrounds,
- waterfront recreation facilities for boat launching along Lake Piziquid,
- a canoe and kayak club,
- walking and hiking trails,
- a tourist bureau,
- two shopping malls,
- several restaurants & pubs,
- coffee shops,
- various downtown businesses,
- travel agency,
- banks,
- credit unions,
- gasoline stations,
- auto repair shops,
- two medical centres,
- drug stores,
- legal services,
- a newspaper,
- convenience stores,
- physiotherapy,
- Vision and Dental services,
- two funeral home,
- a top rate Hospital that offers medical access 24 hours a day, 7 days a week.
- two industrial parks, one located in the Town of Windsor and a second shared by both the Town of Windsor and the County of West Hants in the Windsor-West-Hants Industrial Park.

This list is not intended to be all-inclusive of the services offered by the Town of Windsor.

### **C. Town of Windsor Supports Amalgamation**

## **Town of Windsor's Efforts to Support Amalgamation and Area Co-operation**

For over 10 years, the Town has sought amalgamation or some form of municipal reform with its neighboring municipality of West Hants. Unfortunately, Windsor's enthusiasm for amalgamation has not been reciprocated.

The Town of Windsor has been generous with cost sharing of centrally located services which are provided for both Windsor and West Hants residents. Examples include library and recreational facilities.

Regional cooperation has been a mantra of the Town of Windsor. The Town has documented Council meetings, Joint Council Meetings, letters to West Hants Council and letters to the Warden of West Hants to illustrate its commitment to some form of area government. Likewise, many letters have been written to provincial government departmental leaders and Ministers over the past decade. All of this documentation is available for review on request.

Recently, cost cutting of some services have been made which impacts both town and county residents. Some of these program cuts might have been avoided with more cooperation and sharing of resources. Transit services, police services and grants to community groups have all suffered budget cuts over the past few years. These cuts illustrate circumstances where, if the area was amalgamated and decision making was unified, the results may have been different.

The Town of Windsor's fiscal health is measured by the Province's Financial Condition Index (FCI) which clearly indicates the Town is in sound financial health and is well managed. It makes good financial sense for the Windsor Town Council to join the application for amalgamation now when the town is in good financial health. The Town Council firmly believes that amalgamation would unify this region, with new boundaries, new districts, new unified goals, objectives and strategies.

D. Letter To The Editor" Higher Taxes Absolutely In Store For West Hants  
Hants Journal October 10, 2015

LETTER TO THE EDITOR:

HANTS JOURNAL, October 10, 2015

Higher taxes 'absolutely' in store for Hants County residents

By: Ira Mac Innis, CPA, CA

Vaughan, Hants County, NS

"I recently learned that the warden of West Hants has determined in a letter to the editor published in a provincial paper that I was classified as a 'Critic Misinformed.'

I don't see myself as a critic but rather as a problem solver who is trying to resolve the matter between West Hants and the Windsor Fire Department (WFD) before Oct 23.

For those who know me and my efforts over the last month, there is no one in West Hants who has tried harder to find a solution to the impasse between West Hants and the WFD in the current fire dispute.

In a recent letter to the editor, I took issue with Coun. Randy Matheson's assertion that the municipality has paid too much to the WFD and I countered that the cost of West Hants providing the same service would cost more for less coverage, particularly in the Falmouth area.

Subsequent to my letter and prior to its publication, I undertook quiet discussions with both parties to this dispute and met separately with the two senior representatives of West Hants and the Chief of the WFD. Both of those meetings went very well.

As a result of those meetings, I came up with a solution to the impasse that I very strongly believe would resolve this matter and allow for a new long-term contract between the parties.

When I asked for a meeting for Oct 8, to present my solution I was advised by the warden: 'I certainly appreciate your effort but as I stated previously, council has made the decision to move forward. We can meet at a later date to discuss the future relationship with Windsor Fire Department and their role in our new fire service plan if you'd like but I'm unclear as to why we would meet at this time.'

Clearly, West Hants has no interest in resolving this matter even though a solution is available due to my direct discussion with each of the parties – a discussion that has been sorely lacking in the past in order to articulate issues between the parties and to come up with a resolution. The mediator threw up her hands in frustration and the province has no interest in getting involved. Therefore, I undertook to talk to the parties to try and find common ground. I have done that.

The warden articulated three issues in my letter that he disagreed with.

1, The representatives of West Hants said they are not hiring four new staff for fire services. However, it was said by them in the meeting that West Hants would have four county

employees, who are trained as firefighters, carry fire gear in their trucks so as to respond quickly to fire calls.

As far as I personally know, the only full time municipal employee trained at present is the Hantsport fire chief. The hiring of any additional full time employees for whatever department to cover fires services will mean increased costs and taxes to the ratepayers of West Hants.

2. The warden states that West Hants did not know that the WFD was handling \$1 million reserve until the mediator's report came out.

WFD was clear to me that they provide their consolidated financial statements to West Hants each year along with their 15-year capital replacement plans and that West Hants was in agreement with the expenditure of over \$400,000 for breathing apparatus which would come out of the reserve along with provincial and Town of Windsor money.

To say that they don't understand the financial statements and know what is being spent is more than a bit offside on their part, in my opinion.

3. The warden states that West Hants will not be borrowing \$10 million for a new Three Mile Plains (TMP) substation. He does say that the cost should be under \$2 million for TMP.

They told me in our meeting when I met with them that they were also looking to build a new fire station in Falmouth. I think the fire marshal and themselves realize that they need to fill the gap in their current plan, especially when the Windsor Elms senior's residence is looking to do a private contract with the WDF due to concerns with coverage and protection.

If we assume this will be another \$2 million along with the expenditure of another \$1 million for trucks to cover the area, we are at \$5 million over and above the current approved amount of \$3 million. Because things usually take longer and cost more than anticipated, I assume that the total will come in at \$8 to \$10 million of new borrowings. The annual debt servicing will be significant. This is an added cost to the West Hants taxpayers.

What I was trying to do in my previous correspondence was show that the cost of the new West Hants fire service cannot be cheaper than the WFD cost.

By selectively denying certain items, the warden has very effectively defused the situation expressed in my letter while not admitting to everyone that tax costs will be higher.

The WFD direct cost for fire protection is currently \$0.05 per \$100 of assessment. This will be replaced by the new West Hants fire service cost of at least \$0.13 and quite possible \$0.18 on \$100 of assessment. It will be three years before I can confirm it but it will come to pass. After 45 years of dealing with municipal finances in Nova Scotia, I am absolutely sure of that!

Ira Mac Innis

Vaughan"

**E. Council Sizing Up New Fire Station**

EDITORIAL:

HANTS JOURNAL, January 4, 2016

West Hants council sizing up new fire station

By: Carol Morris-Underhill

“Discussions expected to heat up in 2016 over new, permanent station

HANTS COUNTY – If West Hants council’s last meeting in December was an indication, a new fire station will be in the works sooner rather than later.

Coun. Randy Matheson told council he wanted to see construction on a new building as soon as shovel can break the ground – if not faster.

“Over this whole situation, we’ve taken some hits and that’s alright because that’s what we do. But the firefighters have taken some hits too. For them, we’ve got to put this to bed. I would love to see us strive for that April 15 deadline”, said Matheson at the Dec. 8 meeting.

Matheson was referring to West Hants’ handling of the fire services situation, which, after five years of failed contract negotiations with the Windsor Fire Department, resulted in the municipality creating their own fire service. In October 2015, Brooklyn firefighters were called upon to operate a temporary substation in Garlands Crossing to cover off the area the WFD had cared for, and the Hantsport firefighters were called upon to provide coverage to Falmouth, Mount Denson and take over the existing substation in Vaughan.

“They’re very appreciative of the building they got (in Garlands Crossing) but they’re anxious to get in a building that is a fire building – a fire department – built for that purpose” said Matheson. “I think it would be folly for us not to try to move this along fast.”

West Hants Chief Administrative Officer Cathie Osborne informed council that she was preparing a request for proposals to not only identify the best location to place a new station to deliver fire services to West Hants’ two growth areas (Garlands Crossing and Falmouth), but to have a qualified professional complete a fire apparatus inventory and analysis.

That request for proposals (RFP) is due by Jan. 6 at noon.

According to the RFP, the CAO is looking to award the contract at a committee of the whole meeting on Jan. 19. (The municipal office could not confirm that a special meeting was planned for this date, as of press time.) The RFP further states the project would start on Feb. 3, and wrap up by March 31, 2016.

As per council’s request, the RFP also asks if it’s possible to do the two studies separately – so that council could get a jumpstart on construction.

During the last meeting of 2015, Osborne advised council it would be wise not to rush the process – and indicated why she felt having both studies completed would give them a better idea of how to move forward.

“I think there is a direct relationship between our inventory and the building. If the report comes back that we have too much of something or not enough, and we build a station that doesn’t fit (what’s needed for apparatus)...then we have built something that may not be good for future use. That is one concern,” said Osborne.

Although she pulled together a temporary fire service within 60 days last year she said rushing to construct a permanent facility is not something she’d want to do.

“That would not be my preferred approach because I think we can do a better job by being more reflective of what we’re doing in the long term.”

Coun. Jennifer Daniels also urged council not to rush into anything, reminding them of the importance of completing the necessary studies.

“We have a two-year lease on a piece of property. We have lots of time. Do it right. Do it cost effective. Do it efficiently,” said Daniels.

Warden Richard Dauphinee agreed with Matheson, saying: “I agree we have to keep moving ahead, and moving ahead fast.”

Throughout the meeting, Matheson and Coun. Shirley Pineo were adamant that work on the new station must begin quickly.

Matheson suggested the Brooklyn Fire Department should be used as a model, which would speed up the process, and said West Hants firefighters already know what they want to see built.

“It’s not just one firefighter or two firefighters or three firefighters. They’re all saying the same thing: ‘Look, we know what we need, we know where it’s got to go,’” said Matheson.

“You can use Brooklyn as a model,” Matheson continued. “With computer models now, you just go click, click, click and you can build a building fairly quickly. They know what they need. They know what they’d do different, which by the way is not a whole lot from what I’ve heard.”

The Brooklyn Fire Department opened in 2010.”

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**Memorandum of Understanding**  
**Between the parties of**  
**Town of Windsor (Windsor)**  
**And**  
**Municipality of the District of West Hants (West Hants)**

**Whereas**, Windsor and West Hants have agreed to resume joint council meetings on a regular basis; and,

**Whereas**, the two municipalities have also signed a *Terms of Reference* on how such meetings will be conducted; and,

**Whereas**, West Hants has asked Windsor to withdraw its application for amalgamation through the UARB process because West Hants does not believe it is supported by the citizens of West Hants, and,

**Whereas**, Windsor wishes to pursue amalgamation because it believes the citizens of Windsor support amalgamation; and,

**Whereas**, both municipal councils believe they represent the citizens and their interests in each of their respective constituencies; and,

**Whereas**, both West Hants and Windsor have a desire to work collaboratively and more closely on areas that will strengthen our greater community; and

**Whereas**, Windsor and West Hants agree the differing views on amalgamation between Windsor and West Hants is straining the relationship and trust given to Windsor and West Hants by its respective citizens; then

**Therefore, the parties agree** to enter into a Memorandum of Understanding:

- to evolve the positive climate and relationship that is developing between our two municipalities
- to ensure coordination and alignment of initiatives in areas of shared interest
- to maximize cost sharing, access and utilization of resources, services and programs for the benefit of the citizens in our community.

**And, the parties also agree** through this MOU, that they will commit to ensuring that an ongoing community benefit is realized whereby

- both parties will endorse the partnership and the results in the community
- both parties will focus on a balance of strategic and tactical partnership opportunities

- both parties agree to review the MOU annually for any updates that may be necessary

**Goodwill**

The MOU is designed to help foster an environment conducive to consultation and ongoing two-way communications between Windsor and West Hants.

The CAOs will be the appointed staff representatives for the Windsor and West Hants for any matters that arise.

**Initiatives**

The first initiatives arising from the approval of this MOU include:

1. The parties agreeing to immediately approach the UARB and the Court of Appeal to suspend the proceedings before them to allow for the content of the MOU between the parties to take place.
2. Beginning immediately, a review of the cost sharing formulae, agreements and models for fairness and equitability to both Windsor and West Hants for programs, resources and services with potential benefits as early as this year's budget deliberations.
3. Joint application for full funding assistance and help of the provincial government for studies that will inform our respective communities on the merits or demerits of operating as one regional entity.
4. After a period not exceeding 12 months, and subject to the mutual agreement of the parties, the Town of Windsor will immediately withdraw from the UARB process.

**Term**

This MOU shall become effective from the date of execution by the Warden of the Municipality of the District of West Hants and the Mayor of the Town of Windsor.

Dated: Feb 8, 2017

Witness: [Signature]

[Signature]

Mayor Anna Allen  
Mayor Anna Allen

Warden Abraham Zebian  
Warden Abraham Zebian

# NEWS RELEASE

For interviews or more information, contact:

Anna Allen Mayor Town of Windsor

(902) 798.6673

Abraham "Abe" Zebian, Warden of West Hants

(902) 790.1566

FOR IMMEDIATE RELEASE

## Windsor and West Hants sign Memorandum of Understanding

**Date and Location,** Today the Municipality of West Hants and the Town of Windsor announced that they have mutually entered into a Memorandum of Understanding ("MOU"). As a result of today's announcement Windsor has agreed to suspend its application for amalgamation through the UARB process sending a positive and hopeful reply to its neighbors in West Hants.

The agreement between Windsor and West Hants outlines a framework for a new relationship that will see the two working cooperatively on shared areas of interest that will benefit all the citizens in their respective communities. The initial objectives are intended to focus on broad areas that will serve to improve access and use of resources, services and programs while generating maximum cost benefits for both municipal units.

Mayor Allen stated "Our collective objective is to work towards a better outcome and eventual structural change that is meaningful to our citizens and community. The MOU demonstrates willingness to work together for the good of our regional community. The Town believes that a strong partnership with West Hants is a better way to achieve the same goals."

Warden Abe Zebian commented "We are very pleased to be able to reach this mutually beneficial agreement with our neighbors and friends in the Town of Windsor. Over the past two months we have had discussions that served to encourage today's announcement. We look forward to a bright, cooperative and prosperous future for all the residents of our region."

Both Warden Zebian and Mayor Allen highlighted that the people of Windsor and West Hants place great value on their public services including the resources and services that are shared with each other. Both leaders expressed enthusiastic optimism about the future for the citizens of Windsor and West Hants.

*Anna Allen*  
Mayor, Town of Windsor

*Abe Zebian*  
Warden, the Municipality of West  
Hants





**Municipal Affairs  
Office of the Minister**

PO Box 216, Halifax, Nova Scotia, Canada B3J 2M4 • Telephone 902 424-5550 Fax 902 424-0581 • novascotia.ca

February 22, 2018

Ms. Anna Allen  
Mayor  
Town of Windsor  
PO Box 158  
Windsor, NS B0N 2T0

-- and --

Mr. Abraham Zebian  
Warden  
Municipality of the District of West Hants  
PO Box 3000  
Windsor, NS B0N 2T0

Dear Mayor Allen and Warden Zebian:

Thank you for meeting yesterday to discuss the challenges and opportunities of municipal government.

The frank and honest conversation we had was enlightening in terms of helping me understand the perspectives of your councils on the current governance environment in Windsor and West Hants. It was clear to me that both councils are in different places regarding their views on amalgamation, but I was encouraged by your willingness to continue to have a productive dialogue towards improving regional cooperation.

As we discussed, the Department of Municipal Affairs (DMA), the Association of Municipal Administrators of Nova Scotia (AMANS) and the Union of Nova Scotia Municipalities (UNSM) are working cooperatively to develop a new model for regional governance and improved municipal cooperation and collaboration. I am pleased that you have both expressed an interest in actively supporting us through this work and potentially acting as a pilot region for this project.

To that end, DMA is committed to providing assistance to facilitate productive discussions among your councils on regional governance and participating in this joint DMA, UNSM and AMANS municipal modernization project. As well, I assure you of my personal support as you embrace this bold new path.

I would also like to reiterate that the Department of Municipal Affairs will not provide funding for the amalgamation application currently before the Utility and Review Board. Rather, we look forward to working with you over the next several months to develop and pilot a new approach for regional governance that could serve as a model for other municipalities.

Sincerely,

Derek Mombourquette  
Minister

c: Chuck Porter, MLA Hants West  
Louis Coutinho, Chief Administrative Officer, Town of Windsor  
Martin Laycock, A/Chief Administrative Officer, Municipality of the District of West Hants

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FOR IMMEDIATE RELEASE:

Thursday, July 19, 2018 (Windsor, NS) – In a Special meeting of Joint Council a motion was passed that the Municipality of the District of West Hants and the Town of Windsor make a request to the Minister of Municipal Affairs to enter into negotiations to consolidate the two municipalities through special legislation and that the process be completed no later than December 31, 2020. The recommendation was passed by both Councils immediately following the Joint Council meeting.

Both the Town of Windsor and the Municipality of West Hants are excited to move in this direction. The Councils made this decision to allow our region to grow unhindered by the political differences that have obstructed moving the region forward for many decades.

The deadline of December 2020 allows time for negotiations, discussions and the ability to identify the unique needs of both municipal units. The Councils remain committed to their residents and strengthening our region's economic and social future.

A request for a meeting has been made to our Minister of Municipal Affairs, Chuck Porter, MLA Hants West, to begin the discussions on the modernization of our two units. Both Councils are eager to work with the Minister as he has represented our area since 2006 and is familiar not only with our struggles, but more importantly our potential. It is anticipated the Province will recognize the leading role that both the Municipality and the Town have taken with tonight's decision and be an active partner in this process.

-30-

Contact:

Warden Abraham Zebian  
Municipality of the District of West Hants  
902-790-1566  
azebian@westhants.ca

Mayor Anna Allen  
Town of Windsor  
902-798-6673  
aallen@town.windsor.ns.ca





# **BILL NO. 55**

**(as introduced)**



*2nd Session, 63rd General Assembly  
Nova Scotia  
67 Elizabeth II, 2018*

Government Bill

## **Region of Windsor and West Hants Municipality Act**

The Honourable Chuck Porter  
Minister of Municipal Affairs

**First Reading:** September 25, 2018

**Second Reading:** September 27, 2018

**Third Reading:** October 9, 2018 (LINK TO BILL AS PASSED)

## **An Act to Incorporate the Region of Windsor and West Hants Municipality**

Be it enacted by the Governor and Assembly as follows:

1 This Act may be cited as the Region of Windsor and West Hants Municipality Act.

2 In this Act,

(a) "Chief Administrative Officer" means the Chief Administrative Officer of the Regional Municipality appointed under Section 8;

(b) "Co-ordinating Committee" means the Co-ordinating Committee established under Section 5;

(c) "Co-ordinator" means the Co-ordinator of the Regional Municipality appointed under Section 4;

(d) "Council" means the Council of the Regional Municipality;

(e) "incorporation date" means April 1, 2020;

(f) "Minister" means the Minister of Municipal Affairs;

(g) "municipal government" means

(i) a municipal unit,

(ii) a service commission in the area of a municipal unit,

(iii) an authority, board, commission, corporation or other entity of a municipal unit, and

(iv) a joint authority, board, commission, committee or other entity involving a municipal unit;

(h) "municipal unit" means Windsor or West Hants;

(i) "Regional Municipality" means the Region of Windsor and West Hants Municipality;

(j) "West Hants" means the Municipality of the District of West Hants;

(k) "Windsor" means the Town of Windsor.

3 On and after April 1, 2020, the inhabitants of West Hants and Windsor are a body corporate under the name the Region of Windsor and West Hants Municipality.

4 (1) The Governor in Council shall appoint a person to be the Co-ordinator of the Regional Municipality for such term as the Governor in Council determines.

(2) The Co-ordinator has all the powers of a commissioner appointed pursuant to the Public Inquiries Act.

5 (1) A Co-ordinating Committee is established consisting of the Mayor and Deputy Mayor of Windsor, the Warden and Deputy Warden of West Hants, and the Co-ordinator.

(2) Windsor and West Hants, by a motion of council, shall each designate an alternate to attend meetings of the Co-ordinating Committee where a member of the Co-ordinating Committee from that municipal unit is unable to attend.

(3) The Co-ordinator is the Chair of the Co-ordinating Committee and may only vote on questions considered by the Committee in the case of a tie.

(4) Three members of the Co-ordinating Committee, including the Co-ordinator and at least one member from each municipal unit, constitute a quorum of the Co-ordinating Committee.

(5) All decisions of the Co-ordinating Committee shall be determined by majority vote.

6 (1) The Co-ordinating Committee is responsible for designing and implementing the administrative structure of the Regional Municipality.

(2) Where the Co-ordinating Committee is unable to decide any question concerning the design and implementation of the administrative structure of the Regional Municipality by majority vote, the Co-ordinator may determine the question, and the decision of the Co-ordinator is final and binding.

7 (1) The Co-ordinating Committee has all the powers of the Council of the Regional Municipality and of its police advisory board until the Council first takes office pursuant to this Act.

(2) The Co-ordinating Committee may contract and be contracted with, sue and be sued, acquire real and personal property, engage officers and employees, prescribe a seal and do such things and make such expenditures as are required for the orderly establishment of the Regional Municipality.

(3) All acts of the Co-ordinating Committee have, upon the incorporation of the Regional Municipality, full force and effect, and are and are deemed to have been exercised by the Regional Municipality.

(4) The officers and employees of a municipal government shall render assistance and furnish all information and perform all acts as requested by the Co-ordinating Committee.

8 (1) The Co-ordinating Committee shall appoint a Chief Administrative Officer of the Regional Municipality by January 1, 2020.

(2) The Chief Administrative Officer, in consultation with the Co-ordinator, shall appoint the heads of the departments of the Regional Municipality.

(3) The Council shall ratify the appointment of the Chief Administrative Officer as soon as practicable after the incorporation of the Regional Municipality.

9 (1) The Chief Administrative Officer, in consultation with the heads of departments, shall employ all other employees of the Regional Municipality, effective on the

incorporation date, or such earlier date as the Chief Administrative Officer deems expedient.

(2) Preference in employment by the Regional Municipality shall be given to an employee of a municipal government where that employee meets the basic requirements for a position.

(3) On or before the incorporation date, the Co-ordinating Committee shall establish a pension plan or a successor pension plan in accordance with the Pension Benefits Act to replace any pension plan established by a municipal government.

10 (1) The Co-ordinator shall apply to the Nova Scotia Utility and Review Board for a determination of, and the Board shall determine, the number of councillors and the boundaries of the polling districts in the Regional Municipality.

(2) Notwithstanding the Municipal Elections Act,

(a) ordinary polling day for the first election of the Mayor and councillors of the Regional Municipality must be held on the first Saturday in March 2020;

(b) no election shall be held for Mayor and councillors of the Regional Municipality in October 2020; and

(c) the term of office of the members of the council elected in 2020 ends at the first meeting of the Council after the municipal election in 2024.

(3) Elections after the first election shall be held in the year 2024 and thereafter in accordance with the Municipal Elections Act.

(4) A nomination for the first election of the Mayor and councillors of the Regional Municipality must be filed at the office of the returning officer by February 12, 2020.

(5) For the purpose of the first election, the Co-ordinator may abridge any time period contained in the Municipal Elections Act.

(6) The Co-ordinator shall, with the assistance of employees of the municipal governments, provide for the first election of the Mayor and councillors of the Regional Municipality.

(7) Notwithstanding clause 18(1)(c) of the Municipal Elections Act, a member of the council of Windsor or West Hants is eligible to be elected to the Council.

(8) Qualifications for nomination as a member of the Council shall be determined as if the municipal units had been merged into the Regional Municipality six months prior to nomination day.

(9) The Council takes office on the incorporation date.

11 (1) Upon the new Council taking office, the new Council shall choose a new name for the Regional Municipality and submit the chosen name to the Governor in Council.

(2) Where the new Council submits a name for the Regional Municipality under subsection (1), the Governor in Council may, by proclamation, change the name of the Regional Municipality to that name.

12 Before the incorporation date, a municipal government shall not

(a) replace an employee who retires, resigns, is laid off or is dismissed, convert an employee from part-time to full-time status or promote an employee or hire a new employee, except in the case of term appointments that will expire before the incorporation date;

(b) enter into any lease, contract or other commitment that has effect after, or a term extending beyond, March 31, 2020;

(c) dispose of a capital asset;

(d) provide early retirement, pre-retirement, termination or severance benefits for any employee, except as required by the terms of an employment contract; or

(e) expend any funds from an operating or capital reserve fund, and after the incorporation date the council shall apply any reserve funds of a municipal government for the benefit of the residents of the area of the former municipal government,

except as authorized by the Co-ordinating Committee.

13 (1) The Regional Municipality may provide early retirement, pre-retirement, termination or severance benefits for any employee of a municipal government who is not employed by the Regional Municipality because of the consolidation of the municipal units.

(2) An early retirement program may be limited to the incumbents of positions that the Chief Administrative Officer considers to be unnecessary for the Regional Municipality.

(3) The cost of severance benefits provided by the Regional Municipality shall be borne by the Regional Municipality and not be charged to the municipal government that formerly employed the employee, and the sums required may be borrowed by the Regional Municipality and must be repaid by the Regional Municipality in not more than 10 annual instalments, as determined by the Council.

14 The Minister may, by order, provide for anything necessary or incidental to the incorporation and effective government of the Regional Municipality.

15 (1) Upon the incorporation of the Regional Municipality, West Hants and Windsor, together with all service commissions in West Hants and Windsor, are dissolved, and the assets and liabilities of them are vested in the Regional Municipality.

(2) Upon the incorporation of the Regional Municipality, every authority, board, commission, corporation or other entity of a municipal government in the area to be incorporated as the Regional Municipality and every joint authority, board, commission, committee or other joint entity involving a municipal government in the area to be incorporated as a Regional Municipality is dissolved and their assets and liabilities are vested in the Regional Municipality.

(3) Subject to any collective agreement, upon the incorporation of the Regional Municipality, the Labour Standards Code governs the treatment of all employee benefits and entitlements.

(4) The vesting of an asset of a municipal government in the Regional Municipality does not void any policy of insurance with respect to the asset, including public liability policies, and the Regional Municipality is deemed to be the insured party for the purpose of any such policy.

(5) Nothing in this Act dissolves any authority, board, commission, committee or other entity that includes representatives of municipalities outside the Regional Municipality.

(6) The Regional Municipality shall continue to pay any pension or annuity being paid by a municipal government on the day preceding the incorporation date according to its terms.

(7) The Regional Municipality is a successor employer for the purpose of the Pension Benefits Act.

16 (1) In this Section, "employee" means an employee as defined in Section 2 of the Trade Union Act, excluding those described in subsection 2(2) of that Act.

(2) The Regional Municipality is a transferee for the purpose of Section 31 of the Trade Union Act and, for greater certainty,

(a) the Regional Municipality is bound by successor rights as determined pursuant to the Trade Union Act; and

(b) subject to the Trade Union Act, the Regional Municipality and the employees, who are covered by collective agreements, of a municipal government are bound by the collective agreements as if the Regional Municipality were a party to them.

(3) Where an employee of a municipal government is employed by the Regional Municipality, the period of employment and seniority of that employee with the municipal government at the time of the incorporation of the Regional Municipality is deemed to have been employment and seniority with the Regional Municipality and the continuity of employment and seniority is not broken.

(4) Where an employee of a municipal government is employed by the Regional Municipality in a position which becomes a bargaining unit position, the employee's right to employment in the position is not affected by whether that employee was previously employed pursuant to a collective agreement and the employee is deemed to have seniority credits with the Regional Municipality equal to the employee's service with that municipal government.

(5) No provision of a collective agreement with a municipal government that purports to favour the employees of one municipal government in obtaining employment with the Regional Municipality over those of another municipal government has any force or effect.

17 (1) A reference in an enactment, deed, will or other document to a municipal government is deemed to be a reference to the Regional Municipality.

(2) A reference in an enactment, deed, will or other document to the mayor or warden of a municipal unit is and is deemed to be a reference to the Mayor of the Regional Municipality.

(3) The by-laws, orders, policies and resolutions in force in a municipal government immediately prior to the incorporation of the Regional Municipality continue in force in the area over which that municipal government had jurisdiction to the extent that they are authorized by this or another Act, until amended or repealed by the Council.

18 (1) Clause 3(be) of Chapter 18 of the Acts of 1998, the Municipal Government Act, is repealed and the following clause substituted:

(be) "regional municipality" means a regional municipality established by or continued by an enactment and includes

- (i) the Cape Breton Regional Municipality,
- (ii) the Halifax Regional Municipality,
- (iii) the Region of Queens Municipality, and
- (iv) the Region of Windsor and West Hants Municipality,

and the area over which each of those bodies corporate has jurisdiction.

(2) Subclause 3(be)(iv) of Chapter 18 is amended by striking out "the Region of Windsor and West Hants Municipality" and substituting the name chosen by the Council under Section 9.

19 (1) Subsection 18(1) has effect on and after April 1, 2020.

(2) Subsection 18(2) comes into force on such day as the Governor in Council orders and declares by proclamation.

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6

## Guiding Principles for Transition Committee

The following guiding principles were developed at a joint council workshop between the Town of Windsor and the Municipality on October 29th, 2018.

The intent of these Guiding Principles is to provide our Windsor/West Hants Transition Committee with broad values to consider when making decisions concerning the consolidation of the two communities.

- 1. Boundaries:** When looking at boundaries, ensure equitable representation for both urban and rural communities for the new council. It is essential that the culture and identities of both the urban and rural communities are retained in the new consolidated community.
- 2. Taxation:** When developing a taxation model for the consolidated community, the existing tax system should serve as a base. Business as usual, services as usual. The electoral boundaries should not impact taxation.
- 3. Debt:** When addressing debt from the former communities, area rates should be used to ensure the repayment of the debt is paid in the spirit it was incurred. By way of example, if the debt was incurred for the benefit of the taxpayers in Windsor, the debt should be area rated to the tax payers of Windsor.
- 4. Administrative Structure:** When developing the blended administrative structure of the consolidated community, all efforts should be taken to ensure there is no job loss as a result of the consolidation. Any planned efficiencies should strive to be achieved through attrition and maintaining corporate knowledge should be prioritized.
- 5. Regional Service Strategy:** An overall strategy for regional service delivery and regional infrastructure prioritization should be informed by an inventory of existing assets.
- 6. Regional Planning:** Regional planning should be a priority for the consolidated community to ensure that the strengths of the urban and rural communities are being leveraged appropriately.
- 7. Public Engagement:** A Public Engagement Plan should focus on transparency and provide diverse ways to inform and engage the public and stakeholders.
- 8. Decisions:** All pertinent decisions should be reviewed with the lens of looking for economic development growth and opportunities.





**Executive  
Council**

*A certified copy of an Order in Council dated  
December 4, 2018*

2018-328

The Governor in Council on the Report and Recommendation of the Minister of Municipal Affairs dated November 27, 2018, and pursuant to Section 4 of Chapter 26 of the Acts of 2018, *An Act to Incorporate the Region of Windsor and West Hants Municipality*, is pleased to appoint Kevin Latimer as the Coordinator for the consolidation of the Town of Windsor and the Municipality of the District of West Hants for a term expiring March 31, 2020.

**Certified to be a true copy**

  
.....  
**Laura Lee Langley**  
**Clerk of the Executive Council**



**TERMS OF REFERENCE**  
**REGIONAL MUNICIPALITY CO-ORDINATING COMMITTEE**  
*(With amendments proposed for January 27, 2020)*

**AUTHORITY**

The Co-ordinating Committee is established pursuant to Section 5 of Chapter 26 of the Acts of 2018, an Act to incorporate the Region of Windsor and West Hants Municipality (the “Regional Municipality”).

**PURPOSE**

The Co-ordinating Committee is responsible for designing and implementing the administrative structure of the Regional Municipality in accordance with the legislation (attached as Appendix “A”).

**SCOPE**

The Co-ordinating Committee has all the powers of the Council of the Regional Municipality and its Police Advisory Board until the Council first takes office on April 1, 2020. The Co-ordinating Committee will be guided in its decision-making by the Guiding Principles adopted by the Committee (attached as Appendix “B”). All acts of the Co-ordinating Committee have, upon the incorporation of the Regional Municipality, full force and effect and are deemed to have been exercised by the Regional Municipality.

**CO-ORDINATING COMMITTEE MEMBERSHIP**

Membership of the Co-ordinating Committee consists of the Mayor and Deputy-Mayor of Windsor and the Warden and Deputy-Warden of West Hants and the Co-ordinator appointed by the Minister. Alternate members designated in accordance with the Act will attend meetings of the Co-ordinating Committee where a member of the Co-ordinating Committee is unable to attend.

**CO-ORDINATOR ROLE**

The Co-ordinator, Kevin Latimer, is appointed pursuant to Order-in-Council dated December 4, 2018 (attached as Appendix “C”). The Co-ordinator is the Chair of the Co-ordinating Committee with all the powers of a Commissioner appointed pursuant to the *Public Inquiries Act*. The Co-ordinator’s role is to oversee and facilitate the consolidation process in concert with the Co-ordinating Committee, while working with the Department of Municipal Affairs’ representatives to ensure the timely and orderly establishment of the Regional Municipality. The various duties and responsibilities of the Co-ordinator are more particularly described in the Act. The Co-ordinator shall have authority to enter contracts binding the Committee by his signature.

### PROJECT ADMINISTRATOR ROLE

The Committee shall be supported in achieving its mandate by a Project Administrator. The duties and responsibilities of the Project Administrator are generally described in Appendix "D". The Project Administrator shall report to and take direction from the Co-ordinator.

### CO-ORDINATING COMMITTEE MEETINGS

- The Committee shall meet as frequently as required at the call of the Chair to complete its mandate.
- The Committee shall meet at least once monthly with additional meetings scheduled as agreed by consensus of the Committee.
- Three members of the Committee, including the Co-ordinator and at least one member from each municipal unit, constitute a quorum of the Co-ordinating Committee.
- The Committee shall strive to make decisions by consensus, and where unable to achieve unanimity, may make decisions by majority vote.
- Meetings shall be open to the public, except where the Committee determines to meet in-camera pursuant to Section 22 of the *Municipal Government Act*.
- Where the Committee meets in-camera, minutes of in-camera meetings shall be taken by the Clerk or a designate and kept in the Office of the Clerk. The minutes of in-camera meetings shall be approved at the next in-camera meeting of the Committee as the first item of business of the in-camera meeting. Minutes of in-camera are not considered to be of public record.
- The Committee shall strive to alternate meetings between Windsor and West Hants.
- The Chief Administrative Officer shall attend to advise and assist in the functioning of the Committee but shall not be a voting member. Additional staff, external consultants and advisors may attend and advise the Committee as required, under the direction of the Co-ordinator.
- While meetings of the Committee are held in public, the meetings are not public hearings.
- Where possible, regularly scheduled meetings of the Committee will be live streamed over the internet. The Committee will not respond to comments during the live stream; there is no obligation of the Committee to maintain these recordings; and the Committee is not responsible to resolve any technical difficulties that may impact the live stream during a meeting.

### CO-ORDINATING COMMITTEE VOTING

All decisions of the Committee shall be determined by majority vote. The Co-ordinator may only vote on questions considered by the Committee in the case of a tie. Where the Committee is unable to decide any question concerning the design and implementation of the

administrative structure of the Regional Municipality by majority vote, the Co-ordinator may determine the question, and the decision of the Co-ordinator is final and binding.

#### AGENDA, MINUTES AND RESOLUTIONS

Minutes and motions of the Committee shall be provided to each member of the Co-ordinating Committee within ten (10) business days after the conclusion of such meeting. The Co-ordinator will endeavour to provide each member of the Co-ordinating Committee with the agenda and required supporting documentation at least two (2) days prior to every meeting. Meeting minutes and agendas shall be posted as soon as conveniently possible in the discretion of the Co-ordinator on the StrongerRegion.ca website for public information purposes.

#### CONFLICT OF INTEREST

It is expected that all members of the Committee will adhere to the *Municipal Conflict of Interest Act*, disclosing any pecuniary or indirect pecuniary interest in any matter before the Committee and refraining from taking part in, or trying to influence either before or after the meeting, any directions or decisions respecting such matters.

Where a member becomes aware of a conflict of interest the member shall, for purposes of Co-ordinating Committee meetings, adhere to the following:

- i. Declare the conflict before any discussion of the issue;
- ii. Remove oneself from the Committee table when the issue arises for discussion; and
- iii. Refrain from any discussion directly or indirectly with Committee members on the issue.

A breach of this guideline may require the Co-ordinator to request the Minister to remove the member and appoint another member in their stead.

#### RESOURCES & BUDGET

- The Committee shall have access to the resources necessary to make decisions and complete its mandate in a timely manner.
- The Co-ordinator shall present a Workplan for approval of the Co-ordinating Committee. The Workplan will guide the Committee in its use of project resources.
- The Co-ordinator, supported by the Chief Administrative Officer, shall present a budget to the Committee for approval. The budget will support the execution of the Committee's Workplan.
- The Co-ordinator will provide a budget update/report to the Committee and Minister on a quarterly basis.
- The Chief Administrative Officer shall provide primary assistance to the Committee and may direct additional staff resources to assist as required.

- The Committee acting through the Co-ordinator may secure the services of such additional staff and advisor(s) as it deems necessary to fulfill its mandate on a timely and cost-effective basis.

#### REPORTING

- Communications and reporting from the Committee shall come principally from the Co-ordinator or his designate from time to time.
- The Committee shall provide a concise progress update to the Minister and the respective Councils no less than once every thirty (30) days.
- The Committee shall provide a concise information bulletin on Workplan progress and pending activities for public awareness at least once every thirty (30) days.
- The Committee shall report to the Minister of Municipal Affairs through the office of the Deputy Minister.
- Members of the Committee shall keep their respective Councils apprised of the progress of the Committee;

#### OTHER

The Committee will review the Terms of Reference periodically for changes or amendments it may deem necessary from time to time.

*January 31, 2019*  
April 15, 2019 (first amendment)  
October 28, 2019 (second amendment)



## FUNDING AGREEMENT

THIS FUNDING AGREEMENT made this 29<sup>th</sup> day of March, 2019.

BETWEEN:

HER MAJESTY THE QUEEN, in right of the Province of Nova Scotia, as represented by the Minister of the Department of Municipal Affairs (hereinafter referred to as the "Province");

and

The Co-ordinating Committee for the consolidation of the Municipality of the District of West Hants and the Town of Windsor as established by section 5 of the *Region of Windsor and West Hants Municipality Act* (hereinafter referred to as the "Co-ordinating Committee").

WHEREAS the Councils for the Municipality of the District of West Hants (hereinafter referred to as "West Hants") and the Town of Windsor (hereinafter referred to as "Windsor") passed resolutions asking the Province to assist them in consolidating their two municipalities into one regional municipality;

AND WHEREAS the Province is supportive of municipal governments that demonstrate leadership for long-term, transformational change, restructuring their governance arrangements to improve efficiency and effectiveness;

AND WHEREAS on October 11, 2018, the *Region of Windsor and West Hants Municipality Act* was proclaimed in effect by the Lieutenant Governor of Nova Scotia, the Honourable Arthur J LeBlanc;

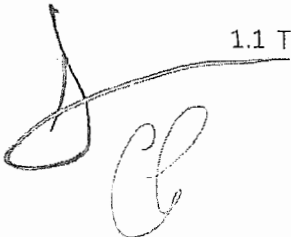
AND WHEREAS the *Region of Windsor and West Hants Municipality Act* incorporates West Hants and Windsor into one regional municipality (hereinafter referred to as the "Regional Municipality") effective April 1, 2020;

AND WHEREAS it is in the best interests of the Province as a whole, the citizens of West Hants, and the citizens of Windsor to consolidate West Hants and Windsor into a single regional government, the Province has agreed to contribute to the costs associated with consolidation;

NOW THEREFORE in consideration of the mutual covenants and agreements contained in this Funding Agreement, the Parties agree as follows:

### 1.0 FUNDING ASSISTANCE

1.1 The Province will provide funding as follows:

A handwritten signature in black ink, consisting of a large, stylized initial 'S' followed by a cursive 'C'.

- (a) Equalization and Town Foundation Grant funding shall be paid to the Regional Municipality over a period of five (5) fiscal years (i.e., April 1, 2020 to March 31, 2025, inclusive). The amount of Equalization funding to be paid to the Regional Municipality shall be no less than the amount received by Windsor in the 2019/20 fiscal year (The Town of Windsor total Equalization and Town Foundation Grant funding received in 2019/20: \$430,403). The total amount to be paid over the next five (5) fiscal year period shall not be less than \$2,152,015 to be paid in amounts as follows: (2020-21) - \$430,403; (2021-22) - \$430,403; (2022-23) - \$430,403; (2023-24) - \$430,403; and (2024-25) - \$430,403. At the expiry of this period, the Equalization allocation for the Regional Municipality will revert to the applicable provincial formula in effect at that time.
  - (b) Funding for post-consolidation expenses will be determined at a later date at the discretion of the Province based on supporting information presented by the Co-ordinating Committee and/or Regional Municipality.
  - (c) The Province will provide up to \$1,500,000 in pre-consolidation funding to cover costs associated with transition. Such costs include, but are not limited to, communications support, legal services, human resources support, boundary reviews and studies, elections, and such other activities necessary to establish the Regional Municipality.
- 1.2 The Co-ordinating Committee shall provide a budget to the Province for approval by the Minister of Municipal Affairs (hereinafter referred to as the "Minister") before any funding will be expensed under this Agreement.

## 2.0 OTHER ASSISTANCE

- 2.1 The Province will work cooperatively with the Co-ordinating Committee and/or Regional Municipality to identify funding sources and programs that will assist the Regional Municipality with future program and infrastructure costs as the need arises and upon request of the Co-ordinating Committee and/or Regional Municipality.

## 3.0 REPORTING REQUIREMENTS

- 3.1 The Co-ordinating Committee will provide the following:
- (a) An overall budget detailing the manner in which funds disbursed pursuant to this Funding Agreement will be expended by the Co-ordinating Committee.
  - (b) On a quarterly basis from the effective date of this Funding Agreement to April 1, 2020, a quarterly forecast update including supporting invoices, detailing the manner in which pre-consolidation funds disbursed pursuant to this Funding Agreement have been expended by the Co-ordinating Committee. This forecast shall be made in a form mandated by the Province.



(c) Electronic copies of any and all of the following documents relating to expenditures made from funding disbursed pursuant to this Funding Agreement:

- i. Requests for Proposals
- ii. Applicants' submissions to Request for Proposals
- iii. Monthly account reconciliations
- iv. Any other records or reports relating to funding provided pursuant to this Funding Agreement as requested by the Province

3.2 The Co-ordinating Committee will provide any records and reports requested by the Province pursuant to this Funding Agreement at the Province's request, and within thirty (30) days of any such request.

#### 4.0 FISCAL AUDITING

4.1 The Co-ordinating Committee shall, at its own cost, conduct an audit with respect to the use of the funding received for the purposes of this Funding Agreement. A copy of this audit shall be provided to the Province immediately upon completion.

4.2 The Co-ordinating Committee will provide, upon request and in a timely manner, to the Province or anyone acting on behalf of the Province:

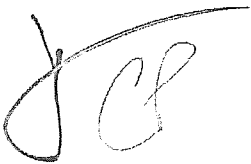
- (a) All books, accounts, and financial records held by the Co-ordinating Committee, or by third parties performing accounting and/or financial management services for the Co-ordinating Committee, relating to this Funding Agreement and the use of funding pursuant to this Funding Agreement.
- (b) Such further information and/or clarification that the Province or anyone acting on behalf of the Province may request relating to this Funding Agreement or the use of funds pursuant to this Funding Agreement.

4.3 The Co-ordinating Committee shall, at all times, ensure that third parties are obligated to provide to the Province or its authorized representative the books, accounts, records, and other information that are in the third party's possession and that relate to this Funding Agreement or the use of funds pursuant to this Funding Agreement.

#### 5.0 RESPONSIBILITIES OF THE CO-ORDINATING COMMITTEE

5.1 The Co-ordinating Committee will:

- (a) Work expediently and in good faith with the Province to implement the *Region of Windsor and West Hants Municipality Act* and the orderly consolidation of West Hants and Windsor.

A handwritten signature in black ink, appearing to be 'JCP', is located in the bottom left corner of the page.

(b) Cooperate with the Province to ensure that the best interests of both the citizens of West Hants and Windsor are given equal and serious consideration in the delivery of municipal services.

5.2 The Co-ordinating Committee will expend the funding disbursed pursuant to this Funding Agreement directly and solely for the purposes outlined in this Funding Agreement or as approved by the Minister in writing, and may not use such funding for any other expenses, expenditures, or purpose whatsoever.

5.3 The Co-ordinating Committee will follow appropriate procurement practices when obtaining goods and services that will be paid for by funds provided by the Province pursuant to this Funding Agreement. This includes, but is not limited to, abiding by the *Public Procurement Act (NS)*, and any/all national/international trade agreements that apply to municipalities now, or that may apply at the time the goods or services are procured.

5.4 An evaluation of the consolidation project will be conducted at a time and on terms agreeable to the Province.

## 6.0 DEFAULT OF OBLIGATIONS

6.1 In the event that any funding provided pursuant to this Funding Agreement has been used for purposes other than those dictated hereunder, or without the express approval of the Minister, such funding is subject to repayment by the Co-ordinating Committee upon the written request of the Minister and shall be repayable within sixty (60) days.

## 7.0 MISCELLANEOUS PROVISIONS

7.1 Other than specified within this Funding Agreement, the Province assumes no further financial responsibility for the consolidation of the Co-ordinating Committee.

## 8.0 NON-LIABILITY AND INDEMNITY

8.1 The Province shall not be liable for any claims, actions, suits, damages, costs or expenses arising from:

(a) Any injury, death, or damage to property resulting from or arising out of any act or omission of the Co-ordinating Committee, their servants, agents, or contractors, in carrying out any work made possible through the funding provided for in this Funding Agreement.

(b) Any loans or any other contractual commitments entered into by the Co-ordinating Committee with any other party or non-party in connection with work made possible through the funding provided for in this Funding Agreement.

A handwritten signature or set of initials, possibly 'JCB', written in black ink in the bottom left corner of the page.

8.2 The Co-ordinating Committee shall at all times indemnify and save harmless the Province, its Minister, officers, employees, agents, or assigns from and against all claims, demands, losses, costs, damages, actions, suits or other proceedings of any kind based upon injury, including death, to any person, or damage to or loss of property, arising from any willful or negligent act, omission or delay on the part of the Co-ordinating Committee, their servants, agents, or contractors, in carrying out any work made possible through the funding provided for in this Funding Agreement.

8.3 The Co-ordinating Committee shall have no authority to bind the Province to any other agreement and the Co-ordinating Committee will not hold themselves out as having any authority, express or implied, or on behalf of, the Province.

9.0 NOTICE

9.1 All notices and communications pursuant to this Funding Agreement shall be deemed duly given upon being delivered by hand, or three (3) days after posting or sent by registered mail, to a Party at the following addresses:

For the Province:

Deputy Minister  
Department of Municipal Affairs  
Maritime Centre, 14 North  
1505 Barrington Street  
Halifax, NS B3J 2M4

For the Coordinating Committee:

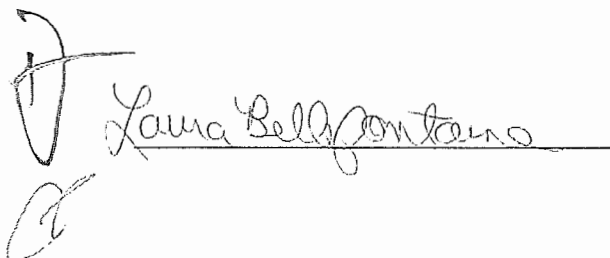
Kevin Latimer, Q.C.  
Co-ordinator  
Purdy's Wharf Tower 1  
1100-1959 Upper Water Street  
Halifax, NS B0N 2T0

10.0 ENTIRE AGREEMENT

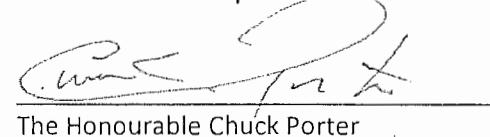
10.1 This Funding Agreement constitutes the whole agreement between the Parties unless duly modified by the Parties by agreement in writing. Any representation or statement not expressly contained herein shall not be binding upon the Parties.

IN WITNESS WHEREOF the Parties hereto have executed this Funding Agreement at the Halifax Regional Municipality, Province of Nova Scotia, Canada on this 29 day of March, 2019.

SIGNED, SEALED AND DELIVERED

  
Laura Bellapontano

HER MAJESTY THE QUEEN, in Right of the  
Province of Nova Scotia, as represented by the  
Minister of Municipal Affairs

  
The Honourable Chuck Porter



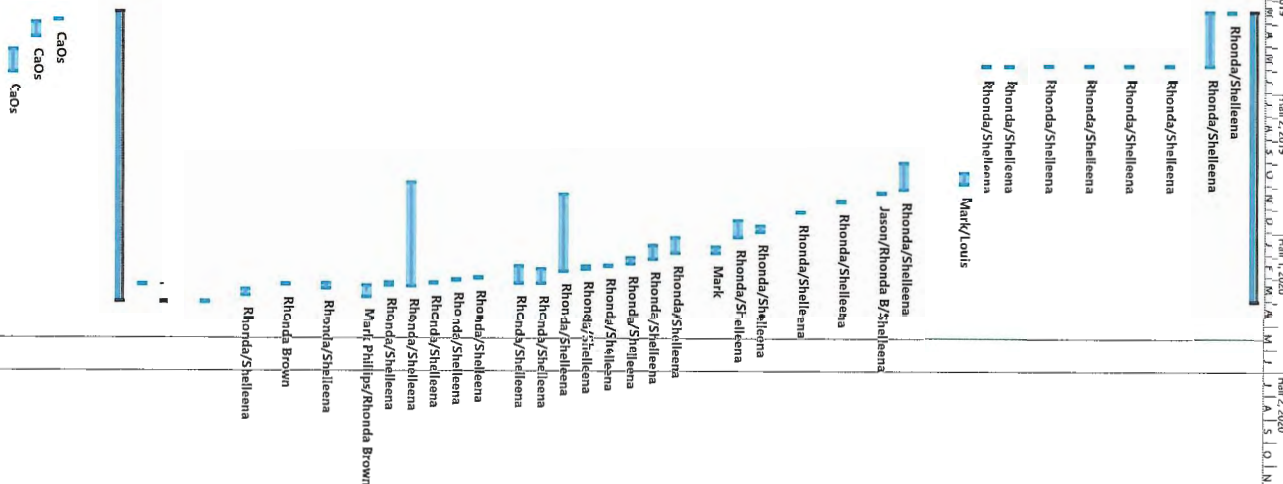
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**Co-ordinating Committee Workplan and Schedule**

ID	Task Name	Duration	Start	Finish	Responsible Parties	% Complete	Gantt Chart											
							Jan 2019	Feb 2019	Mar 2019	Apr 2019	May 2019	Jun 2019	Jul 2019	Aug 2019	Sep 2019	Oct 2019	Nov 2019	Dec 2019
1	I. Regional Government for Windsor / West Hants		Thu 3/17/19	Wed 4/1/20	Co-Ordinator	90%	[Gantt bar from 3/17/19 to 4/1/20]											
2	a) Governance	315 days?	Thu 3/17/19	Wed 4/1/20		97%	[Gantt bar from 3/17/19 to 4/1/20]											
3	i) Stantec Review - Council Site	39 days	Wed 1/2/19	Mon 2/25/19	K/L/C/M/L	100%	[Gantt bar from 1/2/19 to 2/25/19]											
4	Background review	13 days	Wed 1/2/19	Fri 1/18/19		100%	[Gantt bar from 1/2/19 to 1/18/19]											
5	Council Size Benchmarking	3 days	Wed 1/2/19	Fri 1/4/19		100%	[Gantt bar from 1/2/19 to 1/4/19]											
6	Start up Meeting	3 days	Mon 1/7/19	Wed 1/9/19		100%	[Gantt bar from 1/7/19 to 1/9/19]											
7	Council Site Online Survey	28 days	Wed 1/9/19	Fri 2/15/19		100%	[Gantt bar from 1/9/19 to 2/15/19]											
8	Council Size Consultation	34 days	Wed 1/9/19	Mon 2/25/19		100%	[Gantt bar from 1/9/19 to 2/25/19]											
9	Avondale Community Hall	1 day	Tue 1/29/19	Tue 1/29/19		100%	[Gantt bar on 1/29/19]											
10	Brooklyn Civic Center	1 day	Wed 1/30/19	Wed 1/30/19		100%	[Gantt bar on 1/30/19]											
11	SWHF Hall	1 day	Thu 1/31/19	Thu 1/31/19		100%	[Gantt bar on 1/31/19]											
12	Windsor Community Center	1 day	Tue 2/5/19	Tue 2/5/19		100%	[Gantt bar on 2/5/19]											
13	West Hants Municipal Office/Snow Day	1 day	Wed 2/6/19	Wed 2/6/19		100%	[Gantt bar on 2/6/19]											
14	Falmouth Community Hall	1 day	Thu 2/7/19	Thu 2/7/19		100%	[Gantt bar on 2/7/19]											
15	SNOW DAY / West Hants Municipal Office	1 day	Wed 2/13/19	Wed 2/13/19		100%	[Gantt bar on 2/13/19]											
16	Council Size Report	28 days	Wed 1/9/19	Fri 2/15/19		100%	[Gantt bar from 1/9/19 to 2/15/19]											
17	Professor Jamie Baxter Review/Report Delivered	1 day	Fri 2/15/19	Fri 2/15/19		100%	[Gantt bar on 2/15/19]											
18	Council Size Report Presentation	1 day	Mon 2/25/19	Mon 2/25/19		100%	[Gantt bar on 2/25/19]											
19	i) Stantec Boundary Review Assemble and Plot Enumeration Data	79 days	Wed 1/9/19	Mon 4/29/19	K/L/C/M/L	100%	[Gantt bar from 1/9/19 to 4/29/19]											
20	Create Boundary Scenarios	13 days	Wed 1/9/19	Fri 1/25/19		100%	[Gantt bar from 1/9/19 to 1/25/19]											
21	Boundary Scenario Online Survey	15 days	Mon 2/4/19	Fri 2/22/19		100%	[Gantt bar from 2/4/19 to 2/22/19]											
22	Boundary Scenario Consultation	25 days	Mon 2/11/19	Fri 3/15/19		100%	[Gantt bar from 2/11/19 to 3/15/19]											
23	Three Mile Plains Community Hall	11 days	Tue 3/5/19	Tue 3/19/19		100%	[Gantt bar from 3/5/19 to 3/19/19]											
24	Hantsport Baptist Church Hall	1 day	Tue 3/5/19	Tue 3/5/19		100%	[Gantt bar on 3/5/19]											
25	Dr. Arthur Hines Elementary School	1 day	Wed 3/6/19	Wed 3/6/19		100%	[Gantt bar on 3/6/19]											
26	Ardoise Community Recreation Centre	1 day	Thu 3/7/19	Thu 3/7/19		100%	[Gantt bar on 3/7/19]											
27	Windsor Community Center	1 day	Wed 3/13/19	Wed 3/13/19		100%	[Gantt bar on 3/13/19]											
28	SNOW DAY / West Hants Municipal Office	1 day	Thu 3/14/19	Thu 3/14/19		100%	[Gantt bar on 3/14/19]											
29	CC Boundary Consultation	1 day	Tue 3/19/19	Tue 3/19/19		100%	[Gantt bar on 3/19/19]											
30	Stantec Individual Councillor Interviews	2 days	Thu 3/7/19	Fri 3/8/19		100%	[Gantt bar from 3/7/19 to 3/8/19]											
31	Stantec Councillor Presentation	22 days	Wed 2/20/19	Thu 3/21/19		100%	[Gantt bar from 2/20/19 to 3/21/19]											
32	Stantec Final Report Submission	1 day	Mon 4/1/19	Mon 4/1/19		100%	[Gantt bar on 4/1/19]											
33	Stantec Report Presentation to CC	3 days	Wed 4/10/19	Fri 4/12/19		100%	[Gantt bar from 4/10/19 to 4/12/19]											
34	Stantec Revisions (if any)	1 day	Mon 4/15/19	Mon 4/15/19		100%	[Gantt bar on 4/15/19]											
35	Co-ordinating Committee / Final Decision	5 days	Fri 4/19/19	Thu 4/25/19		100%	[Gantt bar from 4/19/19 to 4/25/19]											
36	NSUARB Process	1 day	Fri 4/26/19	Fri 4/26/19		100%	[Gantt bar on 4/26/19]											
37	Co-ordinator Files NSUARB Application	79 days	Wed 5/1/19	Mon 8/19/19	K/L/C/M/L	99%	[Gantt bar from 5/1/19 to 8/19/19]											
38	NSUARB Advertisement of Hearing	1 day	Wed 5/1/19	Wed 5/1/19		100%	[Gantt bar on 5/1/19]											
39	Intervenor at NSUARB Hearing	8 days	Sat 5/11/19	Tue 5/21/19	K/L/C/M/L	100%	[Gantt bar from 5/11/19 to 5/21/19]											
40	NSUARB - Hearing Decision	6 days	Thu 6/6/19	Thu 6/13/19	K/L/C/M/L	100%	[Gantt bar from 6/6/19 to 6/13/19]											
41	Prepare/establish digital mapping for polling districts	2 days	Mon 6/24/19	Tue 6/25/19		100%	[Gantt bar from 6/24/19 to 6/25/19]											
42		1 day	Mon 8/19/19	Mon 8/19/19	K/L/C/M/L	100%	[Gantt bar on 8/19/19]											
43		5 days	Mon 8/12/19	Fri 8/16/19	Kevin	100%	[Gantt bar from 8/12/19 to 8/16/19]											

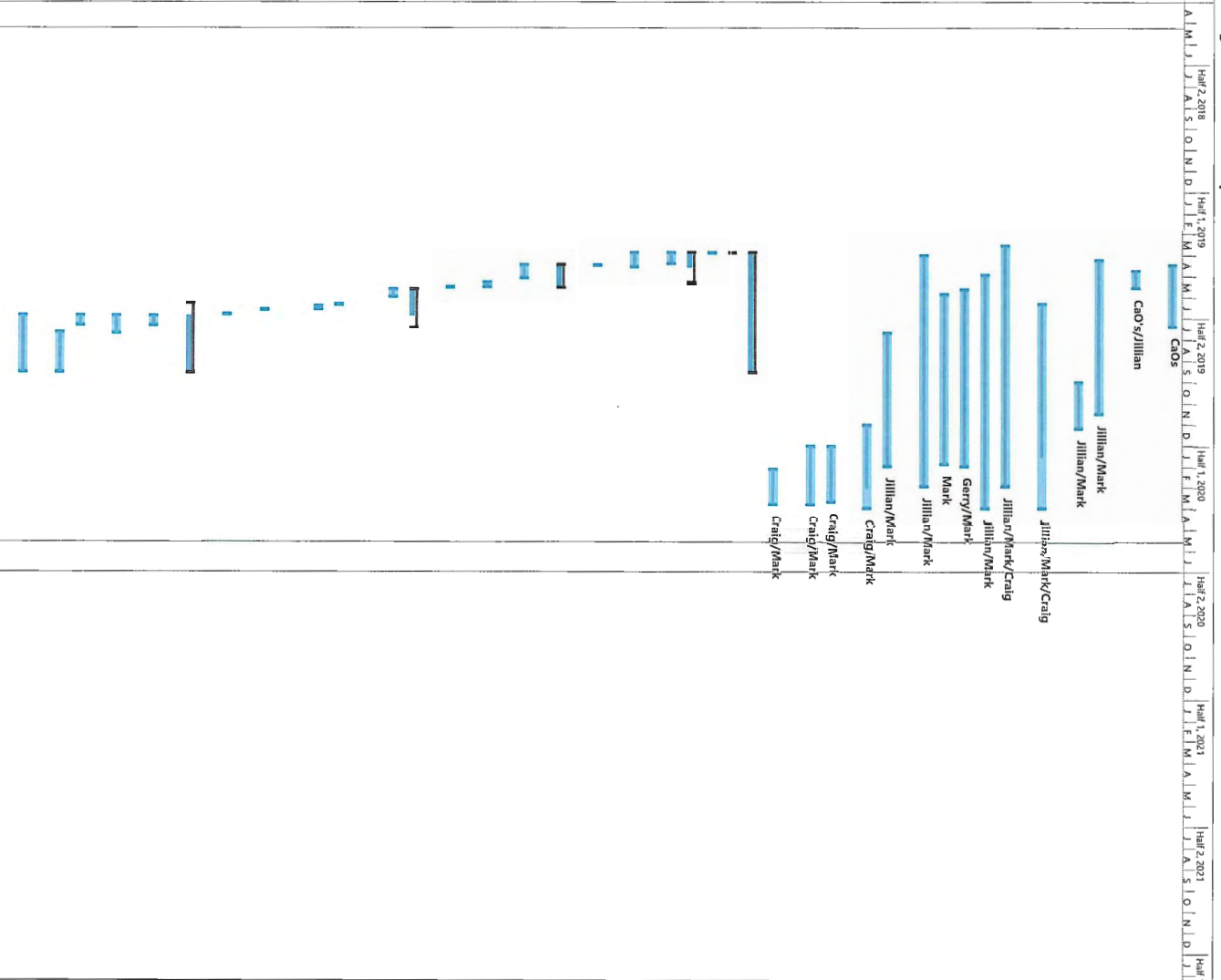
Co-ordinating Committee Workplan and Schedule

ID	Task Name	Duration	Start	Finish	Resource Names	% Complete
44	W Election Process	273 days	Mon 3/18/19	Wed 4/1/20	Rhonda/Sheelleena	98%
45	Paper Voting Decision	1 day	Mon 3/18/19	Mon 3/18/19	Rhonda/Sheelleena	100%
46	Co-ordinating Committee - Budget for election	51 days	Mon 3/18/19	Mon 5/27/19	Rhonda/Sheelleena	100%
47	Appointment of Returning/Assist Returning Officer	1 day	Mon 5/27/19	Mon 5/27/19	Rhonda/Sheelleena	100%
48	Method to Develop Preliminary List of Electors	1 day	Mon 5/27/19	Mon 5/27/19	Rhonda/Sheelleena	100%
49	Approve Optional Advance Poll Dates	1 day	Mon 5/27/19	Mon 5/27/19	Rhonda/Sheelleena	100%
50	Determine Alternative Method of Notification for List Revisions	1 day	Mon 5/27/19	Mon 5/27/19	Rhonda/Sheelleena	100%
51	Set Alternative Notice of Poll	1 day	Mon 5/27/19	Mon 5/27/19	Rhonda/Sheelleena	100%
52	Set date for Amended List Due	1 day	Mon 5/27/19	Mon 5/27/19	Rhonda/Sheelleena	100%
53	Councilor Compensation/Renewal Report to CC	10 days	Tue 10/15/19	Mon 10/28/19	Mark/Louis	100%
54	Prepare package for Candidates	25 days	Tue 10/1/19	Mon 11/4/19	Rhonda/Sheelleena	100%
55	Andole Comm Ctr. Campaign School	1 day	Sat 11/9/19	Sat 11/9/19	Jason/Rhonda B/Sheelleena	100%
56	Avondale Comm Ctr. Campaign School	1 day	Wed 11/20/19	Wed 11/20/19	Rhonda/Sheelleena	100%
57	Hants Co War Mem Comm Ctr. Campaign School	1 day	Wed 12/4/19	Wed 12/4/19	Rhonda/Sheelleena	100%
58	Preliminary List of Electors Due	6 days	Mon 12/23/19	Mon 12/30/19	Rhonda/Sheelleena	100%
59	Revision of Elector List	16 days	Mon 12/16/19	Mon 1/6/20	Rhonda/Sheelleena	100%
60	Council Remuneration Decision - Report to CC	6 days	Mon 1/20/20	Mon 1/27/20	Mark	100%
61	Amended List of Electors Due	14 days	Wed 1/8/20	Mon 1/27/20	Rhonda/Sheelleena	100%
62	Call for Nomination Ad	13 days	Sat 1/18/20	Tue 2/4/20	Rhonda/Sheelleena	100%
63	Official Nominations Received	6 days	Mon 2/3/20	Mon 2/10/20	Rhonda/Sheelleena	100%
64	Candidates Can Withdraw	1 day	Thu 2/13/20	Thu 2/13/20	Rhonda/Sheelleena	100%
65	Order Printed Material	2 days	Fri 2/14/20	Fri 2/14/20	Rhonda/Sheelleena	100%
66	Obtain Poll Workers and Train	73 days	Tue 11/12/19	Thu 2/20/20	Rhonda/Sheelleena	100%
67	Place Notice of Poll Ads	15 days	Tue 2/18/20	Sat 3/7/20	Rhonda/Sheelleena	100%
68	Alternative Notice of Poll (Voter Cards)	17 days	Fri 2/14/20	Sat 3/7/20	Rhonda/Sheelleena	100%
69	1st Advance Poll	1 day	Sat 2/29/20	Sat 2/29/20	Rhonda/Sheelleena	100%
70	2nd Advance Poll	1 day	Tue 3/3/20	Tue 3/3/20	Rhonda/Sheelleena	100%
71	Vote	1 day	Sat 3/7/20	Sat 3/7/20	Rhonda/Sheelleena	100%
72	Website Information	98 days	Mon 10/28/19	Wed 3/11/20	Rhonda/Sheelleena	100%
73	Official Count of Votes	3 days	Sat 3/7/20	Tue 3/10/20	Rhonda/Sheelleena	100%
74	New Councilor Orientation	11 days	Wed 3/11/20	Wed 3/25/20	Mark Phillips/Rhonda Brown	50%
75	Return of election list with Readiness	7 days	Sun 3/8/20	Sat 3/14/20	Rhonda/Sheelleena	100%
76	Declaration to Returning Officer	1 day	Mon 3/9/20	Mon 3/9/20	Rhonda Brown	100%
77	Draft Un-official results report to CC	1 day	Mon 3/9/20	Mon 3/9/20	Rhonda Brown	100%
78	Report to Co-ordinating Committee	6 days	Mon 3/16/20	Mon 3/23/20	Rhonda/Sheelleena	100%
79	Swearing in of Candidates at First Council	1 day	Wed 4/1/20	Wed 4/1/20	Rhonda/Sheelleena	50%
80	V Launch for New Municipality	1 day	Wed 4/1/20	Wed 4/1/20	Vanessa	99%
81	Information report to CC	1 day	Mon 3/9/20	Mon 3/9/20	Vanessa	100%
82	b) Human Resources	272 days?	Mon 3/18/19	Tue 3/31/20	Mark Phillips	96%
83	i) Walsh HR	1 day	Thu 3/28/19	Thu 3/28/19	CAOs	100%
84	Meeting with CAO & Co-ordinator	14 days	Mon 4/1/19	Thu 4/18/19	CAOs	100%
85	On Site meetings with CAO's	21 days	Mon 5/6/19	Mon 6/3/19	CAOs	100%
	Hold introductory meeting with Co-ordinating Committee					



Co-ordinating Committee Workplan and Schedule

ID	Task Name	Duration	Start	Finish	Resource Names	% Complete
86	Attend Town Hall meetings as Required / staff meetings?	65 days	Mon 4/15/19	Fri 7/12/19	CAOS	100%
87	Conduct meetings with staff (min 8 meetings)	19 days	Tue 4/23/19	Fri 5/17/19	CAO's/Jillian	100%
88	Determine Org Structure	160 days	Mon 4/8/19	Fri 11/15/19	Jillian/Mark	100%
89	Conduct interviews for all positions	49 days	Tue 10/1/19	Fri 12/6/19	Jillian/Mark	100%
90	Determine performance management system	212 days	Mon 6/10/19	Tue 3/3/20	Jillian/Mark/Craig	75%
91	Review/Prepare Job descriptions	250 days	Mon 3/18/19	Fri 2/28/20	Jillian/Mark/Craig	100%
92	Review policies and manuals	242 days	Mon 4/29/19	Tue 3/3/20	Jillian/Mark	100%
93	Complete compensation Review	184 days	Mon 5/20/19	Thu 1/30/20	Gerry/Mark	100%
94	Complete Benefits Review	176 days	Mon 5/27/19	Mon 1/27/20	Mark	100%
95	Conduct research & analysis (ongoing)	240 days	Mon 4/1/19	Fri 2/28/20	Jillian/Mark	100%
96	Final Organization Chart	139 days	Mon 7/22/19	Thu 1/30/20	Jillian/Mark	100%
97	Implementation change Management	87 days	Mon 12/2/19	Tue 3/3/20	Craig/Mark	75%
98	Present draft report for feedback	57 days	Wed 1/1/20	Thu 3/19/20	Craig/Mark	100%
99	Prepare and present the final report	59 days	Wed 1/1/20	Mon 3/23/20	Craig/Mark	100%
100	Submit Final Report to CC	36 days	Mon 2/13/20	Mon 3/23/20	Craig/Mark	100%
101	CAO Executive Search	133 days	Thu 3/28/19	Mon 9/16/19	Advisory Group	99%
102	OCL Implementation	1 day	Thu 3/28/19	Thu 3/28/19		100%
103	OCL Start-up Meeting	1 day	Thu 3/28/19	Thu 3/28/19		100%
104	Stakeholder Input	31 days	Thu 3/28/19	Thu 5/9/19		100%
105	Stakeholder discussions and interviews	12 days	Thu 3/28/19	Fri 4/12/19		100%
106	Develop the ideal candidate profile	15 days	Thu 3/28/19	Wed 4/17/19		100%
107	Present Profile & Competencies to CC	1 day	Mon 4/15/19	Mon 4/15/19		100%
108	Search Strategy - Research & Sourcing	25 days	Mon 4/15/19	Fri 5/17/19		100%
109	Develop search strategy and present for approval	15 days	Mon 4/15/19	Fri 5/3/19		100%
110	Contact all preliminary candidates	5 days	Fri 5/10/19	Thu 5/16/19		100%
111	Develop "Long List" of potential candidates	1 day	Fri 5/17/19	Fri 5/17/19		100%
112	Screening and Evaluation	40 days	Mon 5/20/19	Fri 7/12/19		100%
113	Develop Interview questions/refine selection criteria	9 days	Mon 5/20/19	Thu 5/30/19		100%
114	First Round Interviews	2 days	Mon 6/10/19	Tue 6/11/19		100%
115	Debrief and select finalists for Final Interviews	3 days	Thu 6/13/19	Mon 6/17/19		100%
116	Final interviews with Search Committee	1 day	Tue 6/18/19	Tue 6/18/19		100%
117	Debrief with Search Committee	1 day	Tue 6/25/19	Tue 6/25/19		100%
118	Closing Activities/Reference Checking/Onboarding	71 days	Mon 6/10/19	Mon 9/16/19		100%
119	Conduct detailed reference checks	10 days	Fri 6/28/19	Thu 7/11/19		100%
120	Negotiate employment offer	17 days	Fri 6/28/19	Mon 7/22/19		100%
121	Turn off back-up candidate	10 days	Fri 6/28/19	Thu 7/11/19		100%
122	Transitional communications	41 days	Mon 7/22/19	Mon 9/16/19		100%
123	Onboarding and Follow-up program	57 days	Fri 6/28/19	Mon 9/16/19		100%



**Co-ordinating Committee Workplan and Schedule**

ID	Task Name	Duration	Start	Finish	Resource Names	% Complete	2018	2019	2020	2021
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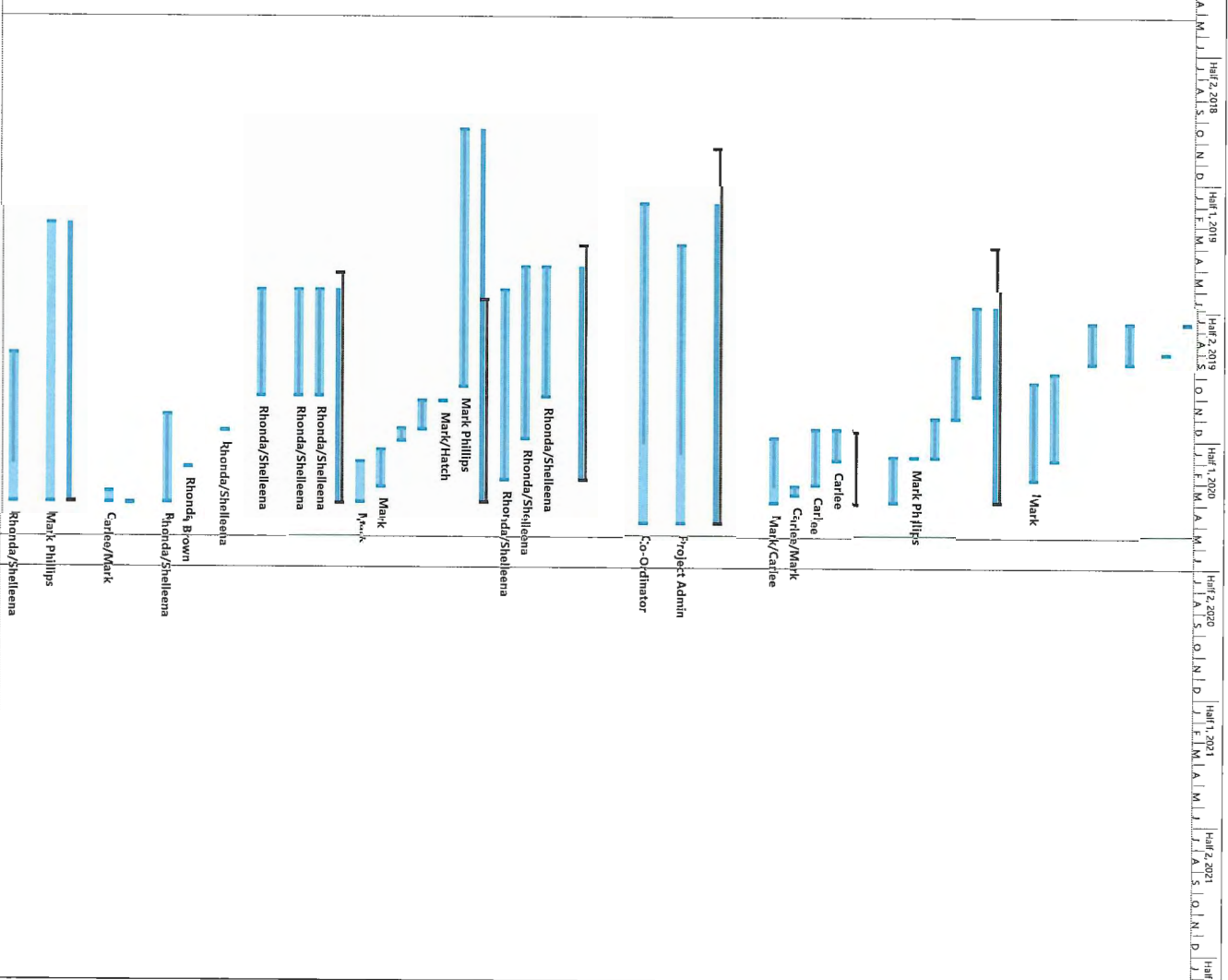
Co-ordinating Committee Workplan and Schedule

ID	Task Name	Duration	Start	Finish	Resource Names	% Complete
172	Recommendation Report for Appointments to be made by Council (Effect date of April 2020)	1 day	Mon 3/23/20	Mon 3/23/20	Madelyn	100%
173	Information Items/Maps to be prepared (paper & website)	228 days	Fri 5/17/19	Tue 3/31/20	Madelyn	100%
174	Asset Registry/Asset Road Map PM	266 days	Thu 4/25/19	Thu 4/30/20	CAO's/Troy	78%
175	Kick off Meeting	1 day	Thu 4/25/19	Thu 4/25/19	CAO's/Troy	100%
176	Project Management	232 days	Thu 4/25/19	Fri 3/13/20	CAO's/Troy	90%
177	Part A: Asset Registry	223 days	Thu 4/25/19	Mon 3/2/20	CAO's/Troy	100%
178	Part B: Asset Road Map	238 days	Thu 4/25/19	Mon 3/23/20	CAO's/Troy	90%
179	Subnet Draft AM Plan	83 days	Mon 12/23/19	Wed 4/15/20	CAO's/Troy	75%
180	Finalize AM Plan	74 days	Fri 1/3/20	Wed 4/15/20	CAO's/Troy	0%
181	Submit Final AM Plan	77 days	Wed 1/15/20	Thu 4/30/20	CAO's/Troy	0%
182	Roads/Streets & Services	65 days	Wed 1/1/20	Tue 3/31/20	Mark/Todd	99%
183	Water Utilities	18 days	Fri 6/28/19	Wed 7/24/19	Martin	100%
184	Waste Water / Sewer	65 days	Thu 4/25/19	Wed 7/24/19	Mark Phillips	100%
185	Parks and Recreation / Social Impact	262 days	Mon 4/1/19	Tue 3/31/20	Mark Phillips	95%
186	Create Master List - Rec Programs/Equip Loans/Tourism Projects	125 days	Mon 4/1/19	Fri 11/29/19	Kathy/Vanessa	100%
187	Identify Agreements	110 days	Mon 7/1/19	Fri 11/29/19	Kathy/Vanessa	100%
188	Identify Organization Relationships/Book King	65 days	Mon 9/2/19	Fri 11/29/19	Kathy/Vanessa	100%
189	Rec Website requirements	87 days	Mon 12/2/19	Tue 3/31/20	Kathy/Vanessa/Chrystal	75%
190	Merge all Media Accounts	22 days	Mon 3/2/20	Tue 3/31/20	Kathy/Vanessa/Chrystal	100%
191	III. FINANCIAL					0%
192	Financial / Tax Impacts	277 days	Fri 3/1/19	Mon 3/23/20	Ron/Mark	35%
193	Working Tax Model	43 days	Fri 3/1/19	Tue 4/30/19	Ron	100%
194	Tax Workshop with Ron & CAO's	1 day	Tue 9/24/19	Tue 9/24/19	Ron/CAO's	100%
195	New Rate Structure - WIP	146 days	Mon 9/2/19	Mon 3/23/20	Ron/Mark/Carlee	30%
196	Area Rate Policy	146 days	Mon 9/2/19	Mon 3/23/20	Ron/Mark/Carlee	30%
197	Municipal Financial Capacity Grant (previously Equalization)	92 days	Fri 11/1/19	Mon 3/9/20	Kathy Cox-Brown	0%
198	n) Financial Consolidation / Internal Government Listings (RA/IS/RC)	284 days?	Mon 4/1/19	Thu 4/30/20	Mark Phillips	96%
199	Chart of Accounts	55 days	Mon 4/15/19	Fri 6/28/19	Martin	100%
200	Banking Recommendation	220 days	Mon 4/1/19	Fri 1/31/20	Doug/Vanuy/Carlee	100%
201	Benefit Research	151 days	Mon 4/1/19	Mon 10/28/19	Doug/Carlee	100%
202	CPA Rating Review	131 days	Mon 4/1/19	Mon 9/30/19	Rhonda/Carol	100%
203	Bring over Customer Database	106 days	Fri 11/1/19	Tue 3/31/20	Carlee/Mark	75%
204	Animal Licenses	89 days	Tue 10/1/19	Fri 1/31/20	Jeff/Mat/Diamond	100%
205	EFT Vendor Setup	122 days	Tue 10/1/19	Wed 3/18/20	Colleen/Jesse	100%
206	PAP Letter (Water/Sewer)	185 days	Mon 7/1/19	Fri 3/13/20	Colleen/Rhonda/Carol	100%
207	Purchase Order Setup	180 days	Mon 7/1/19	Fri 3/6/20	Carmen/Carol	100%
208	Finance Forms	127 days	Tue 10/1/19	Wed 3/25/20	Diana/Rhonda/Carlee	100%
209	Diamond (Background Setup)	139 days	Tue 9/10/19	Fri 3/20/20	Carmen/Colleen/Jesse	100%
210	Banking Setup	197 days	Mon 7/1/19	Tue 3/31/20	Jeff/Mat/Diamond	100%
211	PAP Letter (Taxes)	131 days	Tue 10/1/19	Tue 3/31/20	Account Admin/Carol/Van	100%
212	Policies	180 days	Mon 7/1/19	Fri 3/6/20	Carmen/Carol	100%
213	Tax Billing & Interest Testing	197 days	Mon 7/1/19	Tue 3/31/20	Diana/Carlee/Doug/Vanuy	100%
214	Water/Sewer Billing & Interest Testing	120 days	Tue 10/1/19	Fri 3/27/20	Suzanne/Pam	100%
215	New Payroll Setup & Testing	77 days	Wed 1/1/20	Thu 4/16/20	Carol/Pam	100%
216	Workflow Setup	61 days	Wed 1/1/20	Wed 3/25/20	Diana/Rhonda/Carlee	100%
217	Business Number - Name Change	87 days	Wed 1/1/20	Thu 4/30/20	Carlee	0%
218	Pension Plans to Merge	170 days	Mon 7/8/19	Fri 2/28/20	Carlee/Rhonda M.	99%
219	Recommendation Report	37 days	Fri 5/31/19	Mon 7/22/19		100%
220	Make application to successful carrier to prepare for transfer	0 days	Mon 7/22/19	Mon 7/22/19		100%
221	Notify non successful carrier of intent to transfer	1 day	Mon 7/22/19	Mon 7/22/19		100%
222						

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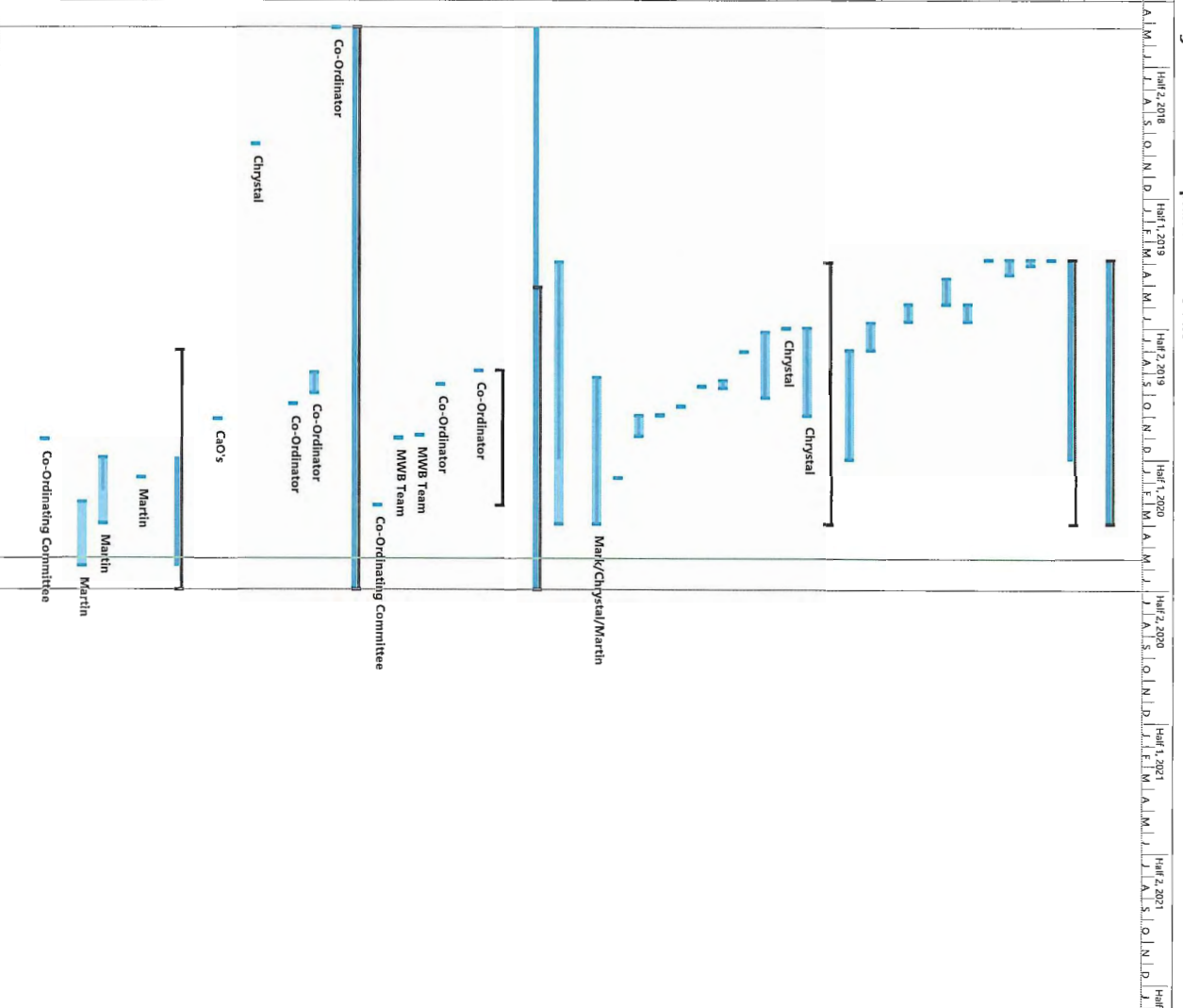
Co-ordinating Committee Workplan and Schedule

ID	Task Name	Duration	Start	Finish	Resource Names	% Complete
223	Identify plan differences	1 day	Mon 7/22/19	Mon 7/22/19		100%
224	Notify Superintendent of Pensions of impending merger	1 day	Mon 9/2/19	Mon 9/2/19		100%
225	Review fund list and determine proper fund offering	41 days	Mon 7/22/19	Mon 9/16/19		100%
226	Create mapping projects for funds transferring in from other carrier	41 days	Mon 7/22/19	Mon 9/16/19		100%
227	Transfer of plan	89 days	Tue 10/1/19	Fri 1/31/20	Mark	100%
228	Deliver educational sessions to all employees	100 days	Mon 10/14/19	Fri 2/28/20	Mark	100%
229	<b>p) Benefits Plans to Merge</b>	262 days <sup>1</sup>	Mon 4/1/19	Tue 3/31/20	Mark Phillips	95%
230	Options Assessment	90 days	Fri 6/28/19	Thu 10/31/19		100%
231	Report for CAO	62 days	Fri 9/6/19	Mon 12/2/19		100%
232	Final Decision	40 days	Tue 12/3/19	Mon 1/27/20		100%
233	Recommendation Report to CC	1 day	Mon 1/27/20	Mon 1/27/20	Mark Phillips	100%
234	Benefit Plan Merger Implementation	47 days	Mon 1/27/20	Tue 3/31/20		100%
235	<b>Budget Framework</b>	73 days	Fri 12/20/19	Tue 3/31/20	Mark Phillips	88%
236	Prepare Budget Templates	31 days	Fri 12/20/19	Fri 1/31/20	Carlee	100%
237	Meet with Department Heads	56 days	Fri 12/20/19	Fri 3/6/20	Carlee	100%
238	Review with CAO	10 days	Mon 3/9/20	Fri 3/20/20	Carlee/Mark	75%
239	Build & Prepare 20 21 Budget Structure for new Regional Membership	65 days	Wed 1/1/20	Tue 3/31/20	Mark/Carlee	75%
240	<b>q) Financial Oversight / Controls for Co-ordinating Committee</b>	384 days	Mon 11/12/18	Thu 4/30/20	Co-Ordinator/Project Administrator	75%
241	Quarterly Financial Template Submission to DMA	284 days	Mon 4/1/19	Thu 4/30/20	Project Admin	75%
242	Quarterly Status Update to DMA	325 days	Fri 2/1/19	Thu 4/30/20	Co-Ordinator	75%
243	<b>IV. ADMINISTRATIVE / ADMINISTRATION</b>					0%
244	<b>r) Contracts / Existing Municipal Contracts</b>	240 days	Mon 4/1/19	Fri 2/28/20	Clerks	99%
245	Detailed list of Agreements	133 days	Wed 5/1/19	Fri 11/4/19	Rhonda/Sheleena	100%
246	Identify End Dates	175 days	Wed 5/1/19	Tue 12/31/19	Rhonda/Sheleena	100%
247	Priority of Contracts	135 days	Mon 6/3/19	Fri 2/28/20	Rhonda/Sheleena	100%
248	<b>s) Space Requirements for new MU</b>	207 days	Mon 6/17/19	Tue 3/31/20	Mark Phillips	89%
249	Hatch Proposal Submission	262 days	Thu 10/18/18	Fri 10/18/19	Mark Phillips	100%
250	Kick off Meeting	1 day	Fri 11/8/19	Fri 11/8/19	Mark/Hatch	100%
251	Draft deliverables	29 days	Fri 11/8/19	Wed 12/18/19		100%
252	Client Review Back	13 days	Wed 12/18/19	Fri 1/3/20	Mark	100%
253	Final Deliverables	37 days	Fri 1/17/20	Mon 3/9/20	Mark	100%
254	Appraisal of Municipal Comptees	42 days	Mon 2/3/20	Tue 3/31/20	Mark	0%
255	<b>t) Boards and Commissions</b>	234 days	Fri 5/10/19	Wed 4/1/20	Rhonda/Sheleena	99%
256	Provide list of Boards & Commissions	109 days	Mon 6/3/19	Thu 10/31/19	Rhonda/Sheleena	100%
257	Determine which Commissions are needed	109 days	Mon 6/3/19	Thu 10/31/19	Rhonda/Sheleena	100%
258	Identify process for establishing committees	109 days	Mon 6/3/19	Thu 10/31/19	Rhonda/Sheleena	100%
259	Letters to current resident members & external boards & agendas	1 day	Fri 12/20/19	Fri 12/20/19	Rhonda/Sheleena	100%
260	Report to Co-ordinating Committee	1 day	Mon 2/10/20	Mon 2/10/20	Rhonda Brown	100%
261	Creation of Policies & TOR for new Committees of Council	88 days	Fri 12/29/19	Tue 3/31/20	Rhonda/Sheleena	100%
262	Appointments to Committees	1 day	Wed 4/1/20	Wed 4/1/20	Carlee/Mark	0%
263	Insurance Coverage for new Municipal Unit	12 days <sup>2</sup>	Mon 3/16/20	Tue 3/31/20	Carlee/Mark	0%
264	<b>u) Property / Transfer of Lands</b>	1 day <sup>2</sup>	Tue 3/31/20	Tue 3/31/20	Todd/MP	0%
265	Identify List of Properties for name change to new Region	233 days	Fri 3/1/19	Tue 3/31/20	Mark Phillips	0%
266	<b>v) Council Policies / By-laws</b>	133 days	Mon 9/2/19	Tue 3/31/20	Rhonda/Sheleena	75%



Co-ordinating Committee Workplan and Schedule

ID	Task Name	Duration	Start	Finish	Resource Names	% Complete
265	V. MAKING THE CHANGE	264 days	Thu 3/28/19	Tue 3/31/20	Mark Phillips	0%
266	Prime Startup Meeting	1 day	Thu 3/28/19	Thu 3/28/19	Mark/Prine	95%
270	Discovery & Analysis	6 days	Thu 3/28/19	Thu 4/4/19		100%
271	Stakeholder Engagement	15 days	Thu 3/28/19	Wed 4/17/19		100%
272	Strategic Approach	1 day	Thu 3/28/19	Thu 3/28/19		100%
273	Concept Development	18 days	Wed 5/29/19	Fri 6/21/19		100%
274	Communication Plan & Key Message Development	26 days	Tue 4/23/19	Tue 5/28/19		100%
275	Development of Communication Tools and Tactics	18 days	Wed 5/29/19	Fri 6/21/19		100%
276	Execution of Tools & Tactics	28 days	Mon 6/24/19	Wed 7/31/19		100%
277	Measurement & Adjustments	109 days	Thu 8/1/19	Tue 12/31/19		100%
278	Public Engagement	262 days	Mon 4/1/19	Tue 3/31/20		89%
279	Public Engagement Events	89 days	Mon 7/1/19	Thu 10/31/19	Chrystal	100%
280	Canada Day	1 day	Mon 7/1/19	Mon 7/1/19	Chrystal	100%
281	Avon Community Market	67 days	Sun 7/7/19	Sun 10/6/19		100%
282	Avon River Days	1 day	Sat 8/3/19	Sat 8/3/19		100%
283	Hants County Exhibition	7 days	Fri 9/13/19	Mon 9/23/19		100%
284	Garlic Festival	1 day	Sat 9/21/19	Sat 9/21/19		100%
285	WVH Pumpkin Weight In	1 day	Sat 10/19/19	Sat 10/19/19		100%
286	Close Public Engagement Survey	1 day	Thu 10/31/19	Thu 10/31/19		100%
287	Derek Reilly - Survey Results	21 days	Fri 11/1/19	Fri 11/29/19		100%
288	Presentation to CC - Hulbert Hu	1 day	Mon 1/27/20	Mon 1/27/20	Mark/Chrystal/Martin	100%
289	Name for new MU - School Outreach	147 days	Mon 9/9/19	Tue 3/31/20		100%
290	News Letters	262 days	Mon 4/1/19	Tue 3/31/20		75%
291	X Outreach/University/ Residual Value	302 days	Mon 5/6/19	Tue 6/30/20		40%
292	Management Without Borders	135 days	Fri 8/30/19	Thu 3/5/20	Co-Ordinator	95%
293	Submission sent to Dalhousie/MWB Program	1 day	Fri 8/30/19	Fri 8/30/19	Co-Ordinator	100%
294	Initial Meeting with MWB Team	1 day	Wed 9/18/19	Wed 9/18/19	Co-Ordinator	100%
295	Poster Presentation	1 day	Thu 11/28/19	Thu 11/28/19	MWB Team	100%
297	Report Presentation to CC	1 day	Mon 12/2/19	Mon 12/2/19	MWB Team	100%
298	Benchmark/Indicators Workshop	1 day	Thu 3/5/20	Thu 3/5/20	Co-Ordinating Committee	100%
299	Additional Outreach Items	560 days	Wed 5/9/18	Tue 6/30/20	Co-Ordinator	38%
300	NSFM Workshop	1 day	Wed 5/9/18	Wed 5/9/18	Co-Ordinator	100%
301	Municipal World Publication	21 days	Mon 9/2/19	Mon 9/30/19	Co-Ordinator	100%
302	Annapolis Valley Chamber of Commerce Committee	1 day	Wed 10/16/19	Wed 10/16/19	Co-Ordinator	100%
303	AMA Presentation - Admin Journey	1 day	Thu 10/18/18	Thu 10/18/18	Chrystal	100%
304	Meeting with Gloucester First Nation Administration	1 day	Tue 11/5/19	Tue 11/5/19	CAO's	100%
305	Community Engagement Project (With CCH)	239 days	Thu 8/1/19	Tue 6/30/20	Martin	28%
306	Community Engagement Work Plan Proposal to CC	1 day	Mon 1/27/20	Mon 1/27/20	Martin	100%
307	Phase 1 - Gathering Insight	66 days	Tue 12/31/19	Tue 3/31/20	Martin	50%
308	Phase 2 - Community-Wide Consultation	65 days	Mon 3/2/20	Fri 5/29/20	Martin	0%
309	Meeting with Gloucester First Nation Band Council & Administration	1 day	Wed 12/4/19	Wed 12/4/19	Co-Ordinating Committee	100%





**Indicators of Success:**

**Consolidation of the Town of Windsor and Municipality of the District of West Hants**



Devin Drover, Iliana Irons, Karuna Varakuti, Medha Malviya, Patrick Rooney,  
and William Stevenson

MGMT 5000 – Management Without Borders

Dalhousie University

December 6, 2019

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## ACRONYMS

Acronym	Full Name
BSC	Balanced Scorecard
CBRM	Cape Breton Regional Municipality
CIW	Canadian Index of Well-being
DNV	District of North Vancouver
EAB	Emerald Ash Borer
FCI	Financial Condition Indicators
FIR	Financial Information Return
GDP	Gross Domestic Product
HRM	Halifax Regional Municipality
IPAC	Institute of Public Administration of Canada
KPI	Key Performance Indicators
MBN	Municipal Benchmarking Network
MPMP	Municipal Performance Measurement Program
NGO	Non-Governmental Organization
OECD	Organization of Economic Co-operation and Development
PEC	Prince Edward County
PESLE	Political, Economic, Socio-Cultural, Legal, Environmental Analysis
RQM	Region of Queens Municipality
SDG	Sustainable Development Goals
WCCD	World Council on City Data

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## EXECUTIVE SUMMARY

### Background

In preparation for their voluntary consolidation on April 1<sup>st</sup>, 2020, the Town of Windsor and the Municipality of the District of West Hants, Nova Scotia, have done what no municipalities on the brink of consolidation have done before: they have decided that the success of their union should be measured over the short and long-term future. Because this type of evaluation has not previously occurred, the municipalities enlisted the help of a team of Dalhousie University Faculty of Management Masters students to develop a set of performance metrics that could be used to measure the short and long-term success of their own consolidation, as well as future consolidations across Canada.

### Methods

A literature review was conducted to understand the general expectations of municipal mergers, as well as common components of successful consolidations. The literature review was also used to investigate how performance measurement frameworks are established, and to identify some important attributes of performance indicators. Following the literature review, a jurisdictional scan was completed to determine how municipalities typically measure performance, and what indicators are common across different jurisdictions. A draft list of possible indicators was presented to municipal representatives from Halifax Regional Municipality, Cape Breton Regional Municipality, Region of Queens Municipality, and the Nova Scotia Department of Municipal Affairs for feedback.

### Analysis

The literature review found that major expectations of municipal consolidations include cost savings for the consolidated municipality, better management of urban sprawl, elimination of inter-municipal conflicts, and stronger global competitiveness. Furthermore, successful municipal consolidations are ones where citizens are satisfied with the quality of service delivery, the fluctuation in tax rate, and the preservation of their sense of community identity. It was therefore determined that these outcomes of consolidations should be measured with indicators. Indicators should also be developed to measure whether the desired outcomes stated on the [Windsor/West Hants Together webpage](#) have been achieved.

### Results

Using the Government of Canada's guide for developing performance measurement strategies, with added elements from other jurisdictions across Canada, a logic model was developed to establish key performance indicators that relate to the specific outcomes of consolidation determined to be of importance in the analysis.

### Recommendations

A list of 101 indicators of success were developed across five themes: (1) governance, (2) provision of services and infrastructure, (3) economics, finances and taxation, (4) administrative staff and structure, and (5) sociocultural identity and concerns of citizens.

## 1. INTRODUCTION

### 1.1 Background

In the 1990s, municipal consolidations became a prominent theme in Canadian municipal policy discussions, especially in Nova Scotia (Vojnovic, 1998). In 1992, a Nova Scotia Task Force on Local Government was created to assess the need for local government reform within the province (Vojnovic, 1998). This led to consolidation of the City of Sydney with the County of Cape Breton, along with other incorporated towns within its limits in 1995 (Ramsay, 1998). Similarly, in 1996, the City of Halifax, City of Dartmouth, the Town of Bedford, and Halifax County united (Vojnovic, 1998). The same year, the Region of Queens Municipality was formed through an amalgamation of the Town of Liverpool and the Municipality of the County of Queens (Vojnovic, 1998).

Municipal consolidations often occur with the hopes of improving the effectiveness and the efficiency of service delivery to residents (Slack & Bird, 2013a). The idea is that a larger municipality would have the financial and technological means of providing both a larger quantity, and better quality of services. At the same time, administrative costs would be reduced (Slack & Bird, 2013a). However, despite the number of amalgamations that have occurred over the last few decades, the success of municipal amalgamations is still a highly debated topic. Some studies have demonstrated positive outcomes (Slack & Bird, 2013b; Vickers, 2016), whereas others have showcased negative ones (Miljan, 2019).

Very few municipalities have taken the initiative to evaluate the success of their own consolidation; it is typically done by external organizations or academic researchers. Currently, there is no overarching recommended framework to evaluate the success of a municipal amalgamation within the province. Researchers that have studied the outcomes of consolidations choose their own performance metrics to evaluate success, and these metrics typically focus on financial and administrative outcomes. At the onset of their consolidation, which is scheduled for April 1st, 2020, the Town of Windsor and Municipality of the District of West Hants see an opportunity to pave the way for future municipal amalgamations by creating an evaluation framework, consisting of more than just economic metrics, to determine whether the initiative was a success.

### 1.2 Vision

The consolidation of the Town of Windsor and the Municipality of the District of West Hants is about bringing the community together to work towards common goals and a collective vision. The consolidation is focussed around a vision of strength, growth, and prosperity (Windsor/West Hants Together, 2019). This will be achieved by increasing decision making power, having more sway, and empowering the region.

The goals of consolidation are to grow infrastructure, resources, employment, education and industry (Windsor/West Hants Together, 2019). Through collaboration and a unified regional government, the consolidated municipality of the Town of Windsor and the Municipality of the

District of West Hants, referred to hereafter as the “Consolidated Municipality”, will seek to leverage resources and provide more effective decision-making in areas like land use, regional planning, infrastructure and economic development (Windsor/West Hants Together, 2019).

### 1.3 Purpose

The purpose of this project was to develop performance metrics that could be used to measure the short and long-term success of the consolidation of the Town of Windsor and Municipality of the District of West Hants. Ancillary to that, the goal is for this evaluative framework to be used to determine the success of future municipal consolidations in Nova Scotia and across Canada.

## 2. PESLE ANALYSIS

There are many external factors that are beyond the control of a municipality’s jurisdiction that can affect a municipality’s state of affairs. It is important to understand what these external factors are to determine municipal performance metrics of success, and this can be done through a PESLE analysis. This PESLE analysis examined external Political, Economic, Social, Legal and Environmental factors, respectively. These factors may present opportunities or challenges for the Consolidated Municipality. The key findings from the PESLE analysis are highlighted below.

### 2.1 Political Factors

Political factors that may impact the Consolidated Municipality which were considered include: elections, intergovernmental relations, and municipal policy; and resource availability.

Elections at the municipal, provincial and federal level will each impact how the jurisdiction functions. Municipal elections elect councillors and a head of council (Mayor or Warden) who bring with them new priority areas and perspectives into municipal scope. This change of course can directly impact the ongoing success of the Consolidated Municipality based on the direction chosen. Similarly, provincial elections serve as another important force, as Nova Scotia has jurisdiction over municipal operation – as outlined in the Canadian *Constitution Act*, and defined in the Nova Scotian *Municipal Government Act* – the Consolidated Municipality will have to develop strong relationships with the provincial government to avoid issues or threats of provincial micromanagement (Canada, 1982, sec. 92.8; Nova Scotia, 2019, sec. 2.a-c). While federal elections pose a limited threat, change in federal policy could threaten the municipality’s efficacy through the implementation of austerity measures aimed at limiting grants and transfer payments that the Consolidated Municipality are eligible for.

The availability of resources for which to administer municipal services and bureaucracy is an additional force in the political realm. Due to the forthcoming consolidation of the Town of Windsor and the Municipality of the District of West Hants, there is less grant and subsidy competition in the region. This elimination of federal and provincial grant competition should then be viewed as an opportunity for the municipality to bolster its reserves, infrastructure, and service provision. The former Town of Windsor and Municipality of the District of West Hants were primarily self-financing, and only relied on grants and transfers for 11% of their annual revenue

in 2018 (Municipal Affairs, 2018b; Municipal Affairs, 2018c). Due to this self-sufficiency, resource availability should be viewed as an opportunity, as other levels of government look to invest in successful and fiscally responsible municipalities.

## 2.2 Economic Factors

The economic analysis examined three primary factors that could impact the Consolidated Municipality: population and labour force, economies of scale, and tax rates.

One of the largest challenges the Consolidated Municipality faces is attracting and retaining its labour force for fostering economic growth of the region and increasing investment opportunities. To address this, a focus on international and domestic immigration, along with youth retention, will need to be pursued to achieve long-term economic goals.

At present, the tax structure is different for the Municipality of the District of West Hants and the Town of Windsor, where the latter has higher taxes than the former. Currently, no tax structure has been established for the Consolidated Municipality, which will be decided by the new council as it comes into force.

## 2.3 Socio-Cultural Factors

Factors analyzed in the socio-cultural analysis include the population growth rate and population retirement age (Statistics Canada Census, 2011; & Statistics Canada Census 2016).

The growth rate of the population presents an opportunity for the Consolidated Municipality (Statistics Canada Census, 2016). The Town of Windsor has a much older population compared to the Municipality of the District of West Hants with the median age being 50.2 and 46.6 respectively (Statistics Canada Census, 2016). The Town of Windsor is also where most of the nursing homes, hospitals and health services are located (Statistics Canada Census, 2011; Statistics Canada Census, 2016). This therefore presents an opportunity for the Consolidated Municipality to consider health and mobility offering (Statistics Canada Census, 2011; Statistics Canada Census, 2016). As the overall population of the region is declining at a low rate relative to the province, and the adjacent Halifax Regional Municipality (HRM) and Municipality of the District of East Hants are growing, the Consolidated Municipality may be able to increase the population based on the commuting distance to major job centers.

Both the Town of Windsor and the Municipality of the District of West Hants have aging populations, with the former having over half of its population above the age of 50, and a third above the age of 65 (Statistics Canada Census, 2011; Statistics Canada Census 2016).

## 2.4 Legal Factors

The legal analysis examined relevant legislation and ancillary legislative provisions which pertained to the consolidation process, and what requirements must be met prior to and following consolidation.

This analysis predominately included a review of the *Region of Windsor and West Hants Municipality Act*, which prescribes the creation of the Coordinating Committee, sets the consolidation date of April 1, 2020, and preserves that the by-laws, orders, policies and resolutions in force by either of the municipalities prior to consolidation will remain in-force after this date (Government of Nova Scotia, 2019b). Similarly, statutory requirements for municipal elections under the *Municipal Elections Act* regarding electoral requirements for boundaries of polling districts and number of councillors must be met, as well as freedom of information requirements outlined in the *Municipal Government Act* (Government of Nova Scotia, 2018; Government of Nova Scotia, 2019a).

While these legal factors present both opportunities and threats to the consolidation, it provides an opportunity to conduct a comprehensive review of existing by-laws, procedures, and legal obligations which can identify potential synergies to be exploited for the Consolidated Municipality.

## 2.5 Environmental Factors

The environmental analysis focussed on three important environmental factors acting on the Consolidated Municipality: The United Nations' 2030 Sustainable Development Goals (SDGs), climate change, and the emerald ash borer (EAB).

The United Nations have targeted municipal governments as a crucial component for achieving global sustainable development because of cities' contribution to the global environmental footprint through factors like greenhouse gas emissions and waste generation (Verchick, 2003). The Consolidated Municipality has an opportunity to invest in sustainable urban design infrastructure, namely public transportation and active transportation systems, to play its part in achieving these SDGs set by the United Nations (Urban Systems Ltd, 2018).

Similarly, threats posed by climate change were analyzed, including the impact that inland and coastal flooding may have on the Consolidated Municipality due to its close location to the Bay of Fundy and Avon and Ste-Croix rivers, which are areas of high tidal activity (The Municipality of West Hants, 2013; Butler, 2014). The Consolidated Municipality has an opportunity in this process to adapt and update its infrastructure to meet the challenges that increased flooding probability presents.

Lastly, there is concern about the potential migration of the EAB into the Consolidated Municipality from HRM (Jarrar, 2018). An EAB infestation would likely cause a devastating impact, costing the Consolidated Municipality millions of dollars to manage tree removal and replacement (Natural Resources Canada, 2013). This does not even consider the cost associated with damaging ecosystem services provided by ash trees, including habitat for wildlife and its role

as a riparian tree species (Poland, & McCullough, 2006). Therefore, the presence of the EAB in the region needs to be monitored to ensure it does not become a threat to the environmental success of the Consolidated Municipality.

### 3. METHODOLOGY

#### 3.1 Research Questions and Objectives

To develop performance metrics that determine the success of the Consolidated Municipality, it was first necessary to understand what constitutes ‘success’ with respect to municipal consolidations. Next, performance measurement frameworks were analyzed, and best practices for developing performance measurement frameworks and creating performance indicators were studied. Finally, appropriate performance indicators were chosen. Three overarching questions were formulated, with several sub-questions within them:

1. What aspects of municipal consolidation should be measured to determine success?
  - a. What are some of the expectations of municipal mergers in general?
  - b. What are some of the primary concerns or skeptical attitudes towards municipal mergers in general?
  - c. What are some examples of municipal mergers that were deemed ‘successful’ and why so?
  - d. What are some examples of municipal mergers that were deemed ‘failures’ and why so?
2. What performance measurement framework can be used to develop appropriate performance metrics for the Town of Windsor and the Municipality of the District of West Hants?
  - a. What are municipalities doing to measure performance?
  - b. How are performance measurement frameworks established?
  - c. What are some attributes of feasible performance indicators?
3. What indicators could be used to measure the success of the municipal consolidations within the following themes?
  - a. Governance
  - b. Provision of Services and Infrastructure
  - c. Economics, Finances, and Taxation
  - d. Administrative Staff and Structure
  - e. Sociocultural Identity and Concerns of Citizens

## 3.2 Data Collection and Analysis Components

### 3.2.1 Literature Review

A literature review analysis was identified as necessary for this research, to better understand the history of municipal consolidations in Nova Scotia and in other Canadian jurisdictions. In addition, an examination into the effects of consolidation in Canada, desirable or otherwise, was conducted to inform the overall goal of evaluating the success of the forthcoming merger. The literature review sought to answer each research question subset listed from both question 1 and 2. To do so, it relied heavily on academic sources and grey literature, the latter coming from governments that have participated in consolidation, as well as consulting firms that have examined the complexities of mergers. Furthermore, scholarly literature regarding the development, measurement and usage of key performance indicators (KPIs) was explored to inform the structure and form of recommended indicators found in the final list (Appendix A).

The literature examined in this report was compiled in two different ways. The first means of accumulation was through the usage of academic databases including Novanet, Jstor, Dalhousie University's Canadian Public Policy Collection, and Google Scholar. The following search terms were used to ensure methodological consistency when choosing literature:

- Municipal
- Success
- Nova Scotia
- Measure
- Concerns
- Single-Tier
- Consolidation
- Failure
- Canada
- Rural
- Skepticism
- Restructure
- Amalgamation
- Expectations
- Indicators
- Mergers
- Performance

The second means of accumulating literature was through the bibliographies and references of works chosen in the first selection wave, to further inform the analysis.

### 3.2.2 Jurisdictional Scan

A jurisdictional scan was used to analyze the performance indicators of other consolidated municipalities within Nova Scotia and Canada broadly to answer research question 3. Mandatory criteria for inclusion focussed on jurisdictions comparable to the Consolidated Municipality with respect to municipal structure and rural and urban composition. Municipalities in Nova Scotia and those that have voluntarily amalgamated were also weighted heavily for consideration in the jurisdictional scan. Indicators of performance relating to the partners' prescribed themes of governance, provision of services and infrastructure, finances and taxation, administrative staff and structure, and sociocultural identity and concerns of citizens were assessed for best practices. This analysis was then used to inform which indicators were recommended to the Town of Windsor and the Municipality of the District of West Hants (Appendix A).

Inclusion criteria for the jurisdictional scan included the following:

- |   |                                 |                                   |                               |
|---|---------------------------------|-----------------------------------|-------------------------------|
| <u>Mandatory</u><br><u>Criteria:</u>    | • Merged less than 25 years ago | • Single-tier municipal structure | • Rural and urban composition |
| <u>Preferential</u><br><u>Criteria:</u> | • Located in Nova Scotia        | • Voluntarily amalgamated         |                               |

### 3.2.3 Expert Consultations

Consultations with municipal professionals and experts in Nova Scotia were used as an analysis method to test and refine compiled indicators. This analysis followed the literature review into municipal consolidations, as well as performance indicator best practices gleaned from the jurisdictional scan of comparable municipalities.

Experts were consulted from the following organizations:

- |                                       |  |                                       |   |
|---------------------------------------|--|---------------------------------------|---|
| • Halifax Regional Municipality (HRM) | • Cape Breton Regional Municipality (CBRM) | • Region of Queens Municipality (RQM) | • Nova Scotia Department of Municipal Affairs |
|---------------------------------------|--|---------------------------------------|---|

The totality of all three analyses informed the final recommendation of which indicators the Consolidated Municipality should implement.

### 3.2.4 Limitations

Limitations to data collection and analytical capacity were twofold. The first limitation was the time restraints placed on the project that limited both the breadth and depth to which the report could examine and recommend indicators of municipal merger success. The second was the uniqueness of the Town of Windsor and the Municipality of the District of West Hants’ position as a voluntary merger. Due to the typically imposed nature of amalgamation, municipalities rarely have the time or forethought to establish indicators before merging. Therefore, any claims about the success of a municipality post-consolidation are historically hard to qualify. Furthermore, because of the traditional imposition of amalgamations, a large amount of academic literature on municipal consolidations in Canada is focussed on examining the aftermath, as opposed to an evaluation of success or failure.

Despite this, this report has sought to build a robust data collection and analysis structure that identifies the most common and pressing concerns when it comes to municipal consolidation success. In addition, examination into how success is measured in comparable jurisdictions was pursued to provide the most productive and applicable recommendation of what indicators the Consolidated Municipality should implement.

## 4. LITERATURE REVIEW

Five key themes were examined in this literature review: expectations of municipal consolidations; concerns and skeptical attitudes surrounding municipal consolidations; the identification of successful municipal consolidations; examples of failed municipal consolidations; and the best processes for designing appropriate performance metric frameworks for municipalities.

### 4.1 Expectations of Municipal Consolidation

Literature discussing the types of expectations that initiate municipal consolidations in Canada, whether by merging existing municipalities into two-tier systems or single-tier systems, are in agreeance. There are six key expectations with scholarly consensus that contribute to discourse surrounding municipal restructuring, and are outlined by Tindal in his 2013 book, including the generation of savings, management of urban sprawl, ensuring equity or lessening inequity, elimination of intermunicipal conflicts, reduction of bureaucracy, and the promotion of global competitiveness (Tindal, 2013). This comprehensive list of expectations is explored in depth by Tindal and touched upon by a range of other public administration scholars, who generally agree. Controversies regarding these expectations come in the form of how valid these desires are for pursuing municipal mergers, with some debate on the efficacy of their intended purposes. Scholars that have contributed to this field include but are not limited to Tindal, Bish, Sancton, Miljan, Spicer, Cox, and Poel.

#### *4.1.1 Pursuit of Savings*

The pursuit of savings is demonstrably the most frequent rationale used when consolidation is imposed upon or chosen by municipalities. Provincial obsessions with cost-savings through municipal mergers are indicative of this and began in the 1990s across Canada in provinces including Ontario, New Brunswick, Nova Scotia, and Quebec (Tindal, 2013; Miljan & Spicer, 2015; Sancton, 2015). The creation of savings as a reason to consolidate municipalities is informed by three arguments, ranging from economies of scale, reduction of redundant services and staff, and lastly, that services will remain at the same level provided before consolidation (Tindal, 2013; Bish, 2001).

#### *4.1.2 Managing Urban Sprawl*

Regarding urban sprawl, scholars are also in agreeance that consolidations are not a one stop fix. The expectation is that by annexing urban spillover into rural areas, the consolidated municipality would be better able to manage urban planning, and thereby provide comparatively more efficient services than that of their pre-consolidated counterparts. Tindal, Magnusson, and other leading scholars state that spillover is nearly impossible to contain through strict annexation alone, as settlement patterns are hard to predict and ebb and flow with time (Magnusson, 1981; Tindal, 2013). Instead, these authors claim that consolidation while not the singular solution to urban sprawl, can be successful with thoughtful and collaborative provincial partnership, as provinces possess powers better aligned with high-level settlement planning and intermunicipal coordination (Magnusson, 1981; Tindal, 2013; Sancton, 2015). Therefore, the scholarly consensus

on the validity of urban sprawl as a rationale for consolidation can be summarized as dependent on provincial cooperation.

#### 4.1.3 Pursuit of Equity

Ensuring equity or lessening inequity as an expectation of consolidation rests in the standardization and consolidation of services and the unification of socioeconomically segregated geographic areas. Similarly, to urban sprawl, the use of equity as a rationale is too narrow a scope in which to view the problem. Scholars including Tindal have stated that consolidation of services under a singular entity whether it municipal, provincial, or federal is one of many things that contribute to equity (Tindal, 2013). Each author agrees that by following this same logic, people would be better served by provinces who provide consolidated social services, as this would provide higher standardization across every municipality under its jurisdiction (Tindal, 2013; Sancton, 2015). This in combination with the superior taxation powers possessed by provinces, means that consolidation should only be pursued by municipalities as a valid rationale if municipalities have been devolved authority over the service in question.

#### 4.1.4 Elimination of Conflicts

The expectation of ameliorating differences or grievances regarding local preferences, identities, perspectives, or hyper-competitiveness between municipalities by consolidating is another often used rationale. This expectation, while logically founded, is somewhat disputed by scholars as well, with Reese, Cox, and Tindal explaining that while unifying municipalities can remove conflict related to funding or economic development competition, cultural grievances or competing identities will remain despite these structural changes (Tindal, 2013; Reese & Cox, 2007). Instead, the conflict occurs within the municipality as opposed to between municipalities, which could either help or hurt relations going forward depending on the level of collaboration and consensus building that councillors are willing to engage in. Retention of former municipal boundaries as wards in a newly consolidated municipality also has the tendency to entrench these divisions within the governance structure (Tindal, 2013). However, this scholarly analysis was based on imposed consolidations, meaning that voluntary mergers would presumably be successful when it comes to the elimination of conflict, as they would possess more in common than not.

#### 4.1.5 Reducing Bureaucracy

The reduction of bureaucracy and red tape is another common expectation of consolidation, which is supposed to lead to more affordable and efficient municipal operation. While scholarly opinion on this expectation has been mixed, theoretically the reduction of political leaders and administrative staff along with the creation of service delivery synergies should accomplish this. It is generally agreed that expected red-tape reduction is achievable through consolidations, but only when seen holistically with other measures focussed on being “people centred, change oriented, results oriented, decentralized, revenue driven, and competitive” (Tindal, 2013).

#### 4.1.6 Bolstering Global Competitiveness

Municipal consolidation is also expected to bolster global competitiveness. While this has been used as a rationale by those who claim it provides jurisdictions with more resources and clout to promote or market themselves internationally to taxpayers and investors, competitiveness is conceptually more complex. Scholars agree that consolidating municipalities is not only conducive to economic development due to the removal of jurisdictional barriers to business, but also marketability achieved through increased investment incentives, and increased reputation as a regional power (Sancton, 2015; Tindal, 2013). This point while irrefutable should not overshadow other core tenants of global competitiveness, principally collaboration with businesses, agencies, communities, non-governmental organizations, other levels of government, and foreign relations (Tindal, 2013).

Overall, expectations towards municipal consolidations are often oversimplified or misdirected. Consolidation has the potential to empower communities that comprise a municipality, but only if pursued in a holistic way that acknowledges that consolidation is not a one-time solution to issues concerning its existing functions or services.

## **4.2 Concerns and Skeptical Attitudes**

The level of service delivered to a region depends on how efficient government institutions operate. In the past, municipal consolidations were justified by a belief that municipal restructuring would result in cost savings (Miljan & Spicer, 2015; Slack & Bird, 2013). These savings are expected from achieving economies of scale, coordination of service over a larger area, and equitable sharing of costs. This makes consolidation attractive for many municipalities but concerns still exist (Slack & Bird, 2013). These factors have led to municipal consolidation emerging in at least three Canadian provinces; New Brunswick, Nova Scotia and Ontario over the past few decades. Therefore, to assess skepticism around consolidation, these provinces became an area of focus.

Resident concerns regarding consolidation are often based in fear of the unknown, community breakdown, loss of accountability, and changing taxes and services (Kushner & Siegel, 2003). The level satisfaction of residents depends largely on how effectively residents and businesses can access services, which is largely why these concerns arise. In the past many consolidations have resulted in failure to achieve savings, poor organizational design, tensions between residents and inequitable taxes. This is largely a factor of the overall complexity of the situation, the speed in which the transition process must occur, and a lack of understanding all key factors (Miljan & Spicer, 2015).

Reviewing primary concerns toward municipal consolidation, there were many common themes. Most concerns surrounded a loss of local identity and cost equitability (Miljan & Spicer, 2015). Skeptical attitude towards municipal consolidations largely stem from failed mergers in the past and the unknown impact that changes have. These themes were demonstrated in municipal consolidations nationwide, however these themes will be explored in New Brunswick, Nova Scotia, and Ontario due to the recency and commonalities with the Town of Windsor and Municipality of West Hants consolidation.

#### 4.2.1 Cost Savings

A common concern toward municipal consolidations is cost saving. The expectation of achieving economies of scale and equitable sharing of costs in a jurisdiction is attractive but rarely achieved. Much of the underlying issues of cost savings depends on equitable sharing of costs (Kushner & Siegel, 2003). When municipal governments consolidate, residents often debate over what services should be provided and who is going to pay for it.

A report by the Fraser Institute reviewed Ontario consolidations in the 1990s and 2000s, when hundreds of municipalities consolidated (Miljan & Spicer, 2015). The report outlined three smaller municipalities—Haldimand-Norfolk, Essex, and Kawartha Lakes, which involved primary literature review and primary interviews with those involved in the consolidation process. The report suggested that any Ontario consolidation of substantial size in this period did not achieve cost savings (Miljan & Spicer, 2015). This was further corroborated in Ontario by a report by the University of Toronto Monk School of Global Affairs on the consolidation of Toronto, where costs also increased. (Slack & Bird, 2013).

Consolidations in New Brunswick and Nova Scotia also resulted in no substantial cost savings. Examples of these were in a report by the Institute of Public Administration of Canada (IPAC) on the potential consolidations of Miramichi and Moncton in New Brunswick, and CBRM and HRM in Nova Scotia (Sancton, 1996). In New Brunswick, the consolidations were less aimed reducing costs but more attributed to using existing urban tax bases to finance areas that had previously been underserved (Sancton, 1996). This seemed to be less about becoming more competitive, and more about being equitable in regard to financial burdens that were experienced by municipal governments throughout the province (Sancton, 1996).

In Canadian consolidations, an emphasis was placed on the reduction of duplicated governing bodies that create unnecessary financial burden on taxpayers. In Nova Scotia, this notion was disputed. To address these disputes, in the consolidation of HRM, there was a budgetary review of all affected municipalities (Sancton, 1996). Post consolidation projections indicated savings that were never realized (Sancton, 1996). This projection differed greatly from reality due to non-financial measures, which demonstrates the complexity created by the qualitative factors of consolidation.

Factors that affect savings are demands over how taxes are restructured, how staffing is created and how services are shared. These concerns highlight several areas that consolidations must address to realize savings. This poses the question how it is possible for a consolidation to achieve cost savings while not hurting accessibility and responsiveness?

#### 4.2.2 Taxes

One of the major impacts on post-consolidation cost savings is tax structure. In all Ontario case studies reviewed, residents were often concerned about their taxes changing post-consolidation.

A report by the Canadian Journal of Regional Science tracking the impact of consolidations on three Ontario municipalities; Central Elgin, Chatham-Kent and Kingston indicates concerns of tax adjustments (Kushner & Siegel, 2003). Overall, respondents reported the value they were receiving for their taxes had declined in the three years since consolidation. This was consistent in every jurisdiction other than the former City of Kingston (Kushner & Siegel, 2003). However, it is important to note this result correlated with the level of opposition to consolidation from respondents in these jurisdictions. This indicates reports may be biased by residual negative feelings (Kushner & Siegel, 2003).

Responses from residents of the City of Kingston aligns with the notion that municipal consolidation will reduce jurisdictional spillover of services and expenditure (Kushner & Siegel, 2003). Urban centre residents felt that residents from suburban municipalities utilized services that they did not pay for (Kushner & Siegel, 2003). This sentiment was also highlighted from urban residents in Kawartha Lakes, Essex and Haldimand-Norfolk consolidations (Miljan & Spicer, 2015). Contrarily, this notion of sharing the cost of services with a larger tax base is often the concern of more rural residents upon consolidation. In the case of Kawartha Lakes, the largest concern of lower-tier rural municipalities during consolidation was tax increases (Miljan & Spicer, 2015). Rural residents did not want to pay for services they do not use. As a result, the new municipality avoided long-term increases in property taxes. This resulted in financial stress in other areas of service and has resulted in a debt increase of almost 90% since 2000 (Miljan & Spicer, 2015). These conflicting positions on taxes led to concessions in tax structure which ultimately hurt the goal of achieving an equitable tax system while achieving cost savings.

#### 4.2.3 Service of Delivery

One of the largest debates preventing savings from consolidation is how services are distributed across newly formed municipalities. The complications with sharing services was assessed in a survey by Geography students at Bishop's University on the consolidation of the Town of Lennoxville with the City of Sherbrooke (Fletcher, 2001). Respondents were randomly selected from eligible voters residing in Lennoxville, to share their opinions how consolidation will affect services.

The report noted that outside of cost concerns, most responses opposing the consolidation focused on service quality issues (Fletcher, 2001). Respondents were concerned that consolidation would threaten personal connection with service providers. Respondents rated the importance of quality of service, service in French and English, personalized services and service cost (Fletcher, 2001). Respectively, 99%, 97%, 92% and 95% of respondents ranked these issues as very important or somewhat important. However, they ranked their impression of Sherbrooke's services on the same themes as less adequate (Fletcher, 2001). Most of these responses indicated that the quality of service was tied to accessibility and personal connection to service providers (Fletcher, 2001).

When asked their level of acceptance of joining services, most respondents opposed but at varying degrees. Notable oppositions included labor intensive services such as fire, police and public works (Fletcher, 2001). Recreational services received the highest support for sharing at 27% (Fletcher, 2001). Overall, there was heavy opposition toward a regional government

providing services. This presents complications in achieving economies of scale while also providing quality service for residents. The same sentiment toward distribution of service was also a common concern in municipal consolidations in Ontario, Nova Scotia and New Brunswick (Sancton, 1996).

#### 4.2.4 Staffing

In many municipal consolidations, concerns were voiced about staffing. Common themes included the time needed to address issues restructuring created, harmonization of wages, and a failure to reduce government. Addressing these concerns had a major impact on proposed savings in all examples.

In the Kawartha Lakes, Essex and Haldimand-Norfolk consolidations, there was an expectation that consolidation would reduce government employees (Miljan & Spicer, 2015). This was largely not accomplished. In the Kawartha Lakes consolidation many employees were retained, with employees that could have been let go either hired to fulfill other roles, or had new positions created for them (Miljan & Spicer, 2015). The only reductions in staff came from those who chose the leave the government. This was accompanied by compensation packages, which prevented savings from these departures (Miljan & Spicer, 2015).

A common staffing trend that also prevented the success of consolidations is the upward harmonization of wages increasing the cost of the municipal workforce (Slack & Bird, 2013). The consolidation of Toronto is an excellent example of this concern. Prior to consolidation, resources restricted the level of service some municipalities provided. Consolidation provided an opportunity to address services, but this also required all service employees in that range to be paid fairly (Slack & Bird, 2013). As many workers in the city did not want to have a reduction in pay to do more work, all salaries were required to be harmonized to higher salaries (Slack & Bird, 2013). Not only does that effect the bottom line, but when combined with the need to provide more services this increases expenditure greatly.

The common denominator in these case studies was opposing rural and urban interests in representation. Many of these consolidations moved quickly and did not address this issue adequately. Not only does the appropriate number of employees need to be determined, the process requires new facilities, and a newly elected council. The time constraints of implementation in these imposed consolidations did not provide the opportunity for this issue to be addressed and implemented effectively. Staffing issues seem to be a symptom of concerns over representation, accessibility and accountability. Municipalities must address concerns of staff to ensure they are being treated fairly. This balancing act largely impacts cost savings.

#### 4.2.5 Sense of Community

Outside of cost concerns, apprehensiveness regarding consolidation typically arises from residents fearing a loss of belonging to local communities. These concerns came from sentimental, economic and cultural viewpoints. Perceived cultural differences is the perpetrator of this concern.

Sentimental concern seemed to be focussed on the unknown of the future and attachment to current ways of life. To address sentiment in Central Elgin and Chatham-Kent, the new municipalities kept the existing names and signage of former areas. This was approached drastically different in Kingston, where township names were completely changed (Kushner & Siegel, 2003). Interestingly, these differing adjustments resulted in no decrease in most of the respondents' sense of attachment to their community in all jurisdictions (Kushner & Siegel, 2003). This was attributed to community, in a practical sense, mostly being a function neighbours and informal groups that were not constrained political-legal boundary lines (Kushner & Siegel, 2003).

In these surveys, results indicate only significant minorities reported equal decreases and increases in attachment to community. An example of increased attachment is Dresden a former village in Chatham-Kent. Prior to, residents formed community associations surrounding taxes, services, and costs (Kushner & Siegel, 2003). This aligns with what happened in Kawartha Lakes, where non-central municipalities hold the line on tax rates (Miljan & Spicer, 2015). This community activism indicates that consolidation may increase engagement in some areas.

The Central Elgin, Chatham-Kent and Kingston surveys reported that three years post-consolidation, one-third of respondents had started to view the new municipality as their community (Kushner & Siegel, 2003). These respondents were most likely to be in the commercial and administrative centre of the municipality (Kushner & Siegel, 2003). Areas who did not report integration to the broader community were ones who had their own commercial and administrative hubs within the region (Kushner & Siegel, 2003).

Concerns regarding community belonging in these consolidations were also linked to economic concerns regarding travel. Not only were respondents apprehensive about losing old civic buildings that were nostalgic, but they were also concerned with travelling greater distances to a less familiar area to get the same level of service accustomed to pre-consolidation (Kushner & Siegel, 2003). The report did not follow up on these concerns, which may be a potential opportunity to measure change in service accessibility in future consolidations. This measure may prevent issues that were reported in the Toronto, where the region lost accountability and resident connection as the jurisdiction grew (Slack & Bird, 2013).

The final concern regarding sense of community comes from differing culture. In studies focussed on a proposed consolidation of Moncton, Dieppe and Riverview, Acadian residents of Dieppe were afraid they would lose their culture and voice in government (Sancton, 1996). As Acadians were numerically limited to popular representation at the municipal level, they believed an amalgamation would threaten their culture (Sancton, 1996). This opposition was also held by members of the francophone community, further emphasizing the importance of cultural security (Sancton, 1996).

#### 4.2.6 Municipal Size

To achieve economies of scale a region must be sizable enough to realize efficiencies from taxpayers, but it could come at the cost of accessibility and accountability. Consolidation in Toronto has resulted in the creation of a city that is both too small and too large (Slack & Bird, 2013). Toronto is still too small to have a major impact on large regional issues such as

transportation, planning and economic development. However, the region is too large to adequately respond to the needs of specific residents. It has been indicated that small government units are important to provide adequate local voice and accountability (Slack & Bird, 2013). The closer a government is to its residents' the greater efficiency, accountability, and responsiveness in resource allocation (Slack & Bird, 2013).

Contrarily, many municipalities face interjurisdictional spillovers which should be addressed to ensure benefits of service are utilized by resident within jurisdictional boundaries who are paying for them (Slack & Bird, 2013). This is the justification of many municipalities for consolidation, but if the region is too large this increases bureaucracy, which may reduce access and accountability (Slack & Bird, 2013). As a counter measure, large municipalities create community committees or satellite offices which reduces cost savings.

So what size is appropriate for consolidations? While there is no direct answer, reports indicate there are few realized economies of scale once municipalities reach populations of about 20,000 to 40,000 (Slack & Bird, 2013). This is due to savings on capital intensive infrastructure investments having a lower cost of capital, but not requiring drastic changes in labour intensive employment. The justification behind this is services such as police, fire, and refuse collection which are labour intensive (Slack & Bird, 2013).

### 4.3 What Made Mergers Succeed?

Despite limitations on available literature on municipal consolidation which specify the exact criteria for evaluating the “success,” there are a few examples which illustrate the long-term benefits of consolidation. While benefits may require some time to realize or appear, existing studies on consolidation success focusses on the services shared under new municipalities, the increased capacity for economic development, an ease of interaction with other government bodies, and increased consistency in regional planning. Some literature focuses on the consolidations of Abbotsford-Matsqui, the City of Toronto, the City of St. John's, and the Region of Queens.

#### 4.3.1 The Abbotsford-Matsqui Consolidation

The consolidation of Abbotsford-Matsqui in 1995 has proven to be reliable for measuring success (Vickers, 2016). A study completed by the District of North Vancouver (DNV) in June 2016 provides several takeaways: the new municipality had a higher capacity for shared projects, a stronger regional presence, and stronger long-term planning. This example demonstrated that citizen-led consolidations generally have resulted in better outcomes than forced consolidations, as the unified community had made economic development relatively easier by engaging in projects it otherwise would not have.

Some benefits observed were in the provision of infrastructure services, like improvements made to the older network of pipes within the former district of Abbotsford, which the newly consolidated municipality was able to rehabilitate for both water supply and sewers. These infrastructure improvements were the result of a better spread of costs which could result in an enhancement of the quality of the infrastructure.

Although cost-saving is an expected outcome from consolidation which is not always realized, Abbotsford-Matsqui observed some positive financial outcomes (Vojnovic, 2000). This includes a reduction in costs when the new municipality moved their city hall to Matsqui's municipal hall, and a reduction in expenditure on employee costs and their equipment. Further, unlike some other mergers, Abbotsford was able to avoid salary increases for employees beyond an expected 1.5% cost-of-living increase (Vickers, 2016).

#### 4.3.2 The Toronto Consolidations

The consolidation of six separate municipalities of Toronto -- namely, Etobicoke, Scarborough, York, East York, North York, and the City of Toronto -- in 1998 also demonstrated a level of success with municipal consolidation. The consolidated municipality saw a more uniform provision of services across the city, while some of the poorer pre-consolidated municipalities, like York, observed financial improvement due to the redistribution of wealth (Farrooqui, 2017).

These improvements were explored in the article "Amalgamation of the six cities forming Metro Toronto has been a success" (The Star, 2014), which reported that while Toronto's amalgamation process had no doubt been time-consuming, the new municipality has emerged as a stronger, more equitable, and more efficient city. Similarly, Smith (2007) states that the city no longer had to impose separate tax rates, which exemplified this more uniform provision of services and helped the City establish themselves as being the centrepiece of a stronger, more developed regional economy. He argued that the new consolidated council worked well as it resolved many of the problematic sewage and water problems; greatly improved transportation by constructing expressways, roads, and the subway; addressed educational issues through construction of new schools and the renovation of old ones; and attempted to control future development through the introduction of a regional parks system.

#### 4.3.3 The City of St. John's

A report by Stantec Consulting Ltd. (2011) reviewed consolidations of the *City of St. John's* and *Region of Queens*. It analyzed financial data and concluded that consolidation had not led to an increase in overall costs. For St. John's, immediate cost savings and rise in service standards was observed, and the new municipality has pursued a higher level of community and cultural infrastructure, partly because of income re-distribution and partly due to the ease of usage and time coordination of resources

The growth of the City of St. John's is primarily attributed to the annexation and consolidation process beginning in the 1960s with the continuous expansion of its boundaries (Stantec Consulting Ltd., 2011). St. John's has continued to function well and able to resolve challenges of the former towns and service issues of Airport Heights, Kilbride, and Shea Heights in the 1980s. In 1992, Wedgewood Park, the Goulds and Southlands were included within the City to create viable municipal units. This consolidation has appeared to be successful, as Wedgewood Park and East Meadows were developed to a "reasonable urban standard" as compared to the pre-consolidation levels (Stantec Consulting Ltd., 2011).

As a separate town, Goulds faced financial problems, lacked infrastructure, faced flooding of disposal fields which used to cause contamination of wells and roadside areas. After the consolidation, the municipality invested \$6 million on the Shoal Bay Road water and sewer project and the Lakeview Drive watermain to provide water services to residents using wells (Stantec Consulting Ltd., 2011).

Other significant advantages of the consolidation were improved planning, development control, engineering services and building of an arena which the town could not have afforded earlier (Stantec Consulting Ltd., 2011).

#### 4.3.4 The Region of Queens Amalgamation

Similar results were found by Stantec while analyzing the amalgamation of the Region of Queens, which was created with the amalgamation of County of Queens, the Town of Liverpool and the Villages of Milton and Brooklyn (Dunn, 2016).

Stantec (2011) outlines the main objective of this consolidation was to achieve benefits from economies of scale, especially for Liverpool. Immediate cost savings, reduction in municipal conflicts, and a rise in taxes were observed; however, after 1997, most tax rates started to decline. The town residents saw considerably lower property tax rates than pre-amalgamation levels with the removal of waste disposal fees previously levied by Liverpool, a result of eliminating their joint-service agreement with the former County of Queens.

Other benefits included a reduction in expenditures (health and welfare costs) by half, with the monetary benefits accrued enabling the construction of a wastewater treatment plant in the consolidated municipality (Region of Queens Municipality, 2018). The consolidation has seen a reduction in the rural-urban divide over time, and the new municipality is one of the few areas in Nova Scotia which has a separate comprehensive plan for a rural area. The construction of Queens Place Emera Centre, built-in December 2011 and located in Liverpool acts as the hub of recreational, social and cultural activity in the Region of Queens Municipality (Stantec, 2011; Region of Queens Municipality, n.d.). With a budget of \$22 million, it is approximately 1.5 hours from significant markets such as Halifax, the Annapolis Valley and Yarmouth (Dunn, 2016; Region of Queens Municipality, n.d.), increasing opportunities for economic development than pre-consolidation levels (Stantec, 2011).

Similarly, interviews conducted by Stantec with the municipal staff of other consolidated municipalities in Atlantic Canada stated that municipal restructuring was more productive than intermunicipal agreements (Region of Queens Municipality, n.d.). Although modest economies of scale were observed, expenditures were seen to be steady as an expanding tax base has supported the expansion of services without any increase in the tax rates.

## **4.4 What Have Caused Mergers to Fail?**

While a review of literature evaluating the success of Canadian municipal mergers did not produce a list of universally agreed upon examples of consolidation “failures”, there were common themes or areas of criticism prevalent in the literature. These themes includes: the failure of a

consolidated municipality to achieve cost-savings; the failure of a consolidated municipality to have an efficient or equitable tax system, including maintaining tax rates at existing pre-consolidation rates or below; and citizen dissatisfaction with the consolidated municipality, including a perceived decline in quality of service, sense of community, and value for taxes.

#### 4.4.1 Failure to Achieve Cost Savings

A common critique of municipal consolidation is the failure of these consolidated municipalities to live up to the expectation that municipal services will be delivered at a lower cost (Kushner & Seigel, 2003; Miljan & Spicer, 2015; Vojnovic & Poel, 2000). That is, consolidated municipalities fail to meet expectations that cost savings will be abundant due to factors like a reduction in municipal staff and elected officials, or an ability to purchase things in larger quantities at a lower cost due to increased purchasing power through increased revenue and reserves.

Slack has been a key researcher in evaluating the success of the “new” City of Toronto consolidation in 1998 (2000, 2013). Her findings show that while there were initial staff reductions, there were increased costs shortly after consolidation (2013). This was a result of an increased need to hire firefighters following a review of existing fire services; cost of administrative restructuring; service expansion for solid waste; enhancements in service delivery including litter cleaning; and the signing of new collective agreement. However, these cost increases were not limited to initial start-up costs, and it did not seem to produce cost-savings in the long-term for the consolidation.

Vojnovic (2000) researched into the consolidations of both the Miramichi Urban Community in New Brunswick and HRM illustrates the complexity that comes from consolidation of municipalities of which contain differing levels of urban and rural areas. Because of the different service standards and service levels across the originating original municipalities, and varying expectations from rural and urban residences, consolidations have produced cost-increases in both municipalities to ensure one service standard. This meant governance for certain residents were costlier than prior to the consolidation in the case of both mergers.

Similarly, Spicer’s review of the efforts to create the modern Montreal metropolitan government through consolidation of surrounding municipalities resulted in several cost-increases, mostly due to low-density suburban developments and related geographic sprawl (Miljan & Spicer, 2015). While it does not suggest the consolidation, itself has been a failure, but it does indicate that cost increases need to be better considered during the consolidation process and should not necessarily be expected.

#### 4.4.2 Tax Inequity, Inefficiency and Rates

A related critique of municipal consolidations has been their inability to create a tax system that is equitable and efficient for citizens compared to what existed prior to consolidation, and a failure to produce cost-savings which could be passed onto residents through lower municipal taxes.

Vojnovic (2000) analysis of the consolidations which formed the Miramichi Urban Community and the Halifax Regional Municipality highlighted some difficulties with the design of a tax-structure for newer consolidations. He further identified several circumstances in which inter-jurisdictional spillovers can cause rural residents to be over-charged for services they were not able to equally utilize, such as public transit. He concludes that the design of an efficient tax-service structure is required to ensure fiscal accountability in an urban economy for consolidated municipalities.

Using data for years 2000 to 2012, Miljan and Spicer (2015) analyzed tax rates from three Ontario municipalities that were subject to consolidations: The Town of Essex, the Regional Municipality of Haldimand-Norfolk; and the City of Kawartha Lakes. They then compared these tax rates for other unconsolidated municipalities of comparable size and demography. They concluded that there were significant increases in property taxes for consolidated municipalities compared to their unconsolidated counterparts, in part due to increased municipal costs such as municipal employee compensation and long-term debt.

#### 4.4.3 Citizen Dissatisfaction and Involvement

The satisfaction of citizens in consolidated municipalities is measured both in academic literature, and in popular media sources (Kushner & Siegel, 2003) and is often presented to evaluate the success or failure of a consolidation. Popular concerns studied in the literature includes the perceived efficiency of service delivery, value for taxes, and involvement and sense of community.

Kushner and Siegel (2003) attempted to evaluate the success of the consolidation of three Ontario consolidated municipalities – Central Elgin, Chatham-Kent, and Kingston – through an opinion survey of residents. Most residents surveyed in all three municipalities found that service delivery was more inefficient than pre-consolidation and found that the value they were receiving for their taxes has declined, contrary to pre-consolidation expectation. Regarding sense of community, while most residents surveyed felt no change in attachment to their community, most residents still identified themselves as part of their smaller pre-consolidated municipality rather than the new municipality identity.

Slack and Bird (2013) analyzed the long-term impacts of the consolidation of the City of Toronto, highlighting reduced citizen participation and involvement in municipal matters as a key failure. This includes less opportunity for involvement in local governance as the City expanded, such as a reduction in citizen initiatives like community councils in which local issues could be easily raised. The consolidation also resulted in less direct contact with politicians, less community development initiatives, reduced participation in public consultations on specific issues, and less opportunities per capita for involvement in council subcommittees and task forces.

Poel (2000) analyzed citizen responses to HRM consolidation using the 1999 HRM Citizen Survey, finding similar dissatisfaction and reduced involvement from citizens as referenced by both Kushner and Siegal, and Slack and Bird. Notably, opposition to consolidation increased from 42% to 66% following the consolidation (Poel, 2000). Citizens indicated several reasons for this dissatisfaction with the consolidation, including that they found quality declined services offered

including parks and playgrounds, library services, street and road paving and repair, and snow plowing. There was also heavy reduction what Poel dubs “active participation items” – patterns in attention to and participation in the HRM political community, such as communication with local councillors or attendance in municipal council meetings.

#### 4.5 Appropriate Performance Measurement Framework Design

Relevant academic literature reviewed focussed on the tools used to design and evaluate the success of municipalities. Specifically, the prominent themes identified include current performance metrics used in municipalities, the best practices in the development of evaluative frameworks and key performance indicators (KPIs), the use of non-economic variables in measuring community well-being, and the use of indices and dashboards in evaluative practices.

##### *4.5.1 Current Performance Metrics in Municipalities*

Around the world, there is an increasing demand for governments at all levels to demonstrate accountability and improvements in performance (Sharma, & Gadenne, 2011). One of the earliest mandatory municipal performance reporting initiatives in Canada was the Municipal Performance Measurement Program (MPMP), developed by the Ontario Ministry of Municipal Affairs and Housing in 2000, and discontinued in 2014 (Chan, 2004). Through this performance measurement framework, municipalities were required to report on fifty-four financial and non-financial indicators across twelve service areas, including police services, transit, drinking water, and land-use planning (Chan, 2004; Government of Ontario, 2007). The chosen performance metrics measured efficiency and effectiveness of service delivery (Government of Ontario, 2007). Efficiency measures the amount of resources required to deliver a service, and is typically communicated as a unit cost, for example “the operating costs for police services per household” (Government of British Columbia, 2003; Government of Ontario, 2007). Effectiveness measures are usually expressed as a percentage or ratio, such as “violent crime rate per 1000 persons” (Government of British Columbia, 2003; Government of Ontario, 2007).

Another Canadian performance measurement initiative to measure efficiency and effectiveness of service delivery to municipal residents is the Municipal Benchmarking Network Canada (MBN Canada) (City of Thunder Bay, n.d; MBN Canada, 2017). MBN Canada is a network of sixteen single-tier and upper-tier municipalities from across Canada that share a common framework as well as similar standard measures and definitions for measuring municipal performance (City of Thunder Bay, n.d.). The most recent MBN Canada report, which was published in 2017, presented 177 KPIs across thirty-six service areas (MBN Canada, 2017). Some of the service areas that differ from the MPMP include culture, information technology, and sports and recreation (MBN Canada, 2017).

The MPMP and MBN Canada focus on measuring the efficiency and effectiveness of service delivery. However, this is just one component of what can be measured by municipalities. Although it was initially created for private sector companies the balanced scorecard (BSC) approach, which is a performance and strategic management system, has gained momentum in public sector organizations and municipalities across the world (Sharma, & Gadenne, 2011). The BCS was first developed in the early 1990’s by Kaplan and Norton who believed that financial

metrics did not provide enough information for senior level managers in decision-making, and that it was important to consider other aspects such as customers, internal processes, and learning and growth for long-term success (Madsen, Azizi, Rushiti, & Stenheim, 2019). As such, the BSC “translates an organization’s mission and strategy into a balanced set of integrated performance measures,” which include both financial and non-financial KPIs, as well as leading and lagging indicators across four perspectives: learning and growth, internal processes, customer, and financial (Chan, 2004). He distributed a survey to American and Canadian municipalities to understand their performance measurement strategies and study their view on the BSC. It was found that municipalities’ performance measurement frameworks focussed primarily on financial performance and operating efficiency (Chan, 2004). Furthermore, although few municipalities have implemented the BSC (7.5 percent), many respondents believed that if implemented successfully, the benefits of the BSC would outweigh the costs (Chan, 2004).

#### 4.5.2 Developing Performance Metric Frameworks

Measuring performance is essential for an organization to track the effectiveness of specific programs and initiatives over time (New Zealand Government, 2008). This can help with an organization’s strategic plan as it can therefore understand which services, capability investments, or resource allocations it should prioritize; and which actions and policies it should implement to achieve desired outcomes (New Zealand Government, 2008). Several organizations have released guidance on how to develop effective performance measurement frameworks, including the Society for Human Resource Management Foundation, the New Zealand Treasury (2008), the Government of Canada (2010), the Canadian Transportation Agency (n.d.) and Root Cause, a socially focussed consulting group (Pulakos, 2004; Wolk, Dholakia, & Kreitz, 2009). There are numerous commonalities between these guiding principles, such as the creation of a logic model or a basic results chain, the selection of appropriate indicators, and the development of benchmarks or targets.

One of the first steps an organization must undertake when creating a performance measurement framework is determining the ultimate outcomes it seeks to achieve (New Zealand Government, 2008; Government of Canada, 2010). A logic model, or basic results chain, can then be created, working backwards from the ultimate outcomes, to understand the links between an organization’s resources, activities, outputs, and the ultimate outcomes (Government of Canada, 2010). Generally, the ultimate outcomes to be achieved are divided into time frames; some organizations divide outcomes into short-term and long-term outcomes within the logic model (Public Health Ontario, 2016), whereas others will consider immediate, intermediate and ultimate outcomes (Government of Canada, 2010). Table 1 provides definitions and examples of inputs, activities, outputs and outcomes (Government of Canada, 2010; Public Health Ontario, 2016).

Logic Model Component	Description	Examples
<b>Inputs</b>	These are the financial and non-financial resources that are required to deliver the activities, which will subsequently produce outputs and the intended outcomes.	<ul style="list-style-type: none"> <li>• Funding</li> <li>• Employees</li> <li>• Equipment</li> <li>• Physical facilities</li> </ul>
<b>Activities</b>	These are the actions that an organization must complete to produce an output.	<ul style="list-style-type: none"> <li>• Conducting research and development</li> <li>• Delivering training sessions</li> <li>• Issuing building permits</li> <li>• Delivering workshops</li> </ul>
<b>Outputs</b>	These are the results of the activities – the direct products are services generated by the activities.	<ul style="list-style-type: none"> <li>• Number of people trained</li> <li>• Number of workshops delivered</li> <li>• Water treatment plant</li> <li>• Research reports</li> </ul>
<b>Outcomes</b>	These are the impacts of the outputs; the changes and results which occurred because of the outputs.	<ul style="list-style-type: none"> <li>• Improved policies</li> <li>• Increased knowledge of a certain issue</li> </ul>
<b>Immediate outcomes</b>	This outcome is directly attributable to the output and occurs in the short-term.	<ul style="list-style-type: none"> <li>• Change in awareness, knowledge or skills of a target population</li> </ul>
<b>Intermediate outcomes</b>	This outcome is typically expected to occur after several immediate outcomes have first been achieved.	<ul style="list-style-type: none"> <li>• Change in a target population’s behaviour</li> </ul>
<b>Ultimate outcomes</b>	These are the highest-level outcomes that can be attributable to a program, policy or initiative	<ul style="list-style-type: none"> <li>• Change of state in a target population</li> </ul>

Table 1: Logic Model Components  
Source: (Modified from Government of Canada, 2010)

Once a logic model has been developed and links between inputs, outputs, and outcomes are made, the next step in the development of a performance measurement framework is to choose the appropriate indicators, set targets and benchmarks for those indicators, and develop a performance management plan (Canadian Transportation Agency, n.d.). The performance management plan’s purpose is to describe how performance measurement will be implemented, that is, how the data will be collected, where it will be collected from (primary or secondary data sources), how frequently, and by whom (Government of Canada, 2010; Canadian Transportation Agency, n.d.). Once the data has been collected, it must then be analyzed, and communicated to appropriate stakeholders (Canadian Transportation Agency, n.d.).

#### 4.5.3 Best Practices in KPI Development

There are several elements to consider when developing key performance indicators (KPI). First off, two types of indicators can be used: qualitative and quantitative (Government of Canada, 2010; Canadian Transportation Agency, n.d.). Quantitative indicators measure a number and a unit, whereas qualitative indicators measure judgment or perception (Government of Canada, 2010; Canadian Transportation Agency, n.d.). For both quantitative and qualitative KPIs, validity is an important attribute, meaning that KPIs must measure what they were designed to (KPI Basics, n.d.). They must also offer comparisons to understand how performance for a certain criterion has evolved over time (KPI Basics, n.d.). As such, there should be time-series data available (Miller, 2007). Indicators should also be simple to communicate to the target audience and relevant to aid in policy decision-making (Miller, 2007). Reliability is another indicator attribute – if more than one measurement was made for that indicator, the same result would be obtained (Miller, 2007). Good indicators should also be able to detect a small change within a system (Miller, 2007). In summary, validity, policy relevance, simplicity, time-series data, sensitivity and reliability are important characteristics of indicators (Miller, 2007).

Beyond these indicator characteristics, when developing a set of indicators, it is important to ensure that there is a balance between the number of leading indicators and lagging indicators (KPI Basics, n.d.). The difference between a leading and lagging indicator is that “a lagging indicator measures the current results of our past actions, whereas leading indicators measure the future results of our current efforts” (Trivedi, 2018). Similar to what was described in 4.5.2, lagging indicators involve measuring outcomes, whereas leading indicators measure outputs (Trivedi, 2018). It is crucial to include these two types of indicators within a set of KPIs to measure government performance because the consequences of government decisions are often felt in the long-term (Trivedi, 2018). A performance management system that only uses lagging indicators does not provide a real perception of the consequences of current decisions (Trivedi, 2018).

#### 4.5.4 Measuring Community Well-Being

Beginning with the Beyond GDP initiative in the late 2000s, in recent years, there has been increased emphasis on measuring the social and community well-being of populations (OECD, n.d.a.) As such, around the world, countries have been developing well-being frameworks which measure environmental, social and economic dimensions of well-being. In addition to countries, international organizations have created well-being frameworks, such as the Organization of Economic Co-operation and Development (OECD) Better Life Index and the World Happiness Report (OECD, n.d.b; Helliwell, Layard, & Sachs, 2017). The World Happiness Report assesses the well-being of residents using evaluative well-being measures, in which respondents are asked how satisfied they are with their life (Helliwell et al., 2017). This way of measuring the subjective well-being (i.e. self-reported data) of individuals has garnered increased attention in recent years (Tiberius, 2006). The OECD Better Life Index measures well-being using objective and subjective measures across a dashboard of eleven domains (OECD, 2017). These domains are housing, income, jobs, community, education, environment, civic engagement, health, life satisfaction, safety, and work-life balance (OECD, 2017). For each domain, the indicators are averaged with equal weights to produce an index. The OECD Better Life Index was produced following many of the recommendations in Stiglitz, Sen and Fitoussi’s 2009 Report on the Measurement of Economic

Performance and Social Progress, one of the most influential publications about measuring well-being (OECD, 2017). This framework has served as a basis for many well-being frameworks created by countries around the world, including the Luxembourg Index of Well-Being New Zealand's Living Standards Framework (King, Huseynli & MacGibbon, 2018; Stiglitz, Fitoussi & Durand, 2018).

In Canada, the University of Waterloo has produced the Canadian Index of Well-being (CIW), which evaluates well-being separately at the national, provincial and community level (University of Waterloo, n.d.). At the national and provincial levels, well-being is assessed based on a composite index giving equal weight to 64 indicators across eight domains: (1) living standards, (2) healthy populations, (3) community vitality, (4) democratic engagement, (5) leisure and culture, (6) time use, (7) education and (8) the environment (University of Waterloo, 2016). On the community level, well-being is assessed using a survey, which measures subjective well-being (University of Waterloo, n.d.). This was chosen as the ideal method for measuring well-being within a community because local indicator data is minimal (University of Waterloo, n.d.). The questions in the survey relate to the eight domains from the national and provincial index, which helps to understand the stronger and weaker domains of a community, based on survey responses (University of Waterloo, n.d.).

#### 4.5.5 Index v Dashboard

In choosing a performance measurement approach, it must be decided whether to present results as a composite index, or in a dashboard format. A composite index amalgamates the results from several indicators into one single value. This is beneficial because complex, multi-dimensional issues can be summarized into a single score that is simple to understand (Chakraborty, 2002). The dashboard approach, on the other hand, presents indicator results side-by-side without combining them into one single number (Stiglitz, Sen & Fitoussi, 2018). The dashboard approach is more visual – stronger and weaker indicator results are evident, which increases transparency, and details are not lost, as they would be with a composite index. However, one issue with dashboards is that most of them do not demonstrate the causal links or hierarchies between the indicators (Stiglitz et al., 2018). Furthermore, dashboards are also often criticized for lacking what made GDP a success: a single, powerful headline number that can be tracked over time and that can be compared between countries (Stiglitz et al., 2009). Despite this, in the field of well-being, the use of the dashboard dominates (Stiglitz et al., 2009). The dashboard is also as a business management tool as a way of tracking performance (Rasmussen, Bansal & Chen, 2009).

## 5. JURISDICTIONAL SCAN

To answer the third research question about which KPIs can be used to measure consolidation within each of them specific thematic categories – governance; service and infrastructure provision; economics and finances; staff and administrative structure; and sociocultural identity and concerns of citizens – a jurisdictional scan was used. In addition, the scan was used to better inform the report’s assessment of indicators as an extension of the literature review’s discussion of performance measurement.

In this scan, municipalities were examined to determine what the impact of consolidation had been as illustrated by indicators implemented by post-consolidation jurisdictions. For feasibility and applicability, specific inclusion criteria were developed to focus the scope of research. The inclusion criteria employed consisted of single-tier municipalities created in the last twenty-five years. Further, for comparison to the Consolidated Municipality, the focus was placed on large rural municipalities that were merged with urban centres. Preferential consideration was also given to consolidated Nova Scotia municipalities, as well as those that pursued amalgamation voluntarily. More analytical consideration was given to municipalities that most closely matched these five criteria.

The scan includes an inclusion criteria chart, a brief report on each municipality, as well as the indicators used by them, followed by best practices and lessons learned from each municipality. The individual reports include a brief history of the municipality, an examination of whether the consolidation was deemed a success and by who, and lastly, a breakdown of some of the KPIs used by the municipality in question. Altogether, the jurisdictional scan from these eight municipalities reveals the standards and norms of performance measurement in municipalities comparable to Consolidated Municipality and provide contextual background and inspiration for the recommended indicators (Appendix A). It is important to note that for use in the jurisdictional scan, information must have been available online and accessible to the general public.

### 5.1 Inclusion Criteria

Municipality	Year Consolidated (< 25 years)	Single-Tier	Rural/Urban Merger	Province	Voluntary Consolidation
Halifax Regional Municipality	1996	Yes	Yes	NS	No
Cape Breton Regional Municipality	1995	Yes	Yes	NS	No
Region of Queens Municipality	1996	Yes	Yes	NS	Yes
Chatham-Kent	1998	Yes	Yes	ON	No
Prince Edward County	1998	Yes	Yes	ON	No
Quinte West	1998	Yes	Yes	ON	No
Norfolk County	2000	Yes	Yes	ON	Yes
Kawartha Lakes	2001	Yes	Yes	ON	No

Table 2: Inclusion Criteria

### 5.2 Halifax Regional Municipality (Nova Scotia)

HRM meets four of the five possible inclusion criteria, apart from being involuntary. HRM is an example of Nova Scotia municipal restructuring. Amalgamated in 1996, the municipality covers approximately 6000 km<sup>2</sup> and contains 45% of the province's population (Halifax Partnership, 2019). While the imposition of this merger faced staunch opposition in its inception, competition between communities now within its confines has been cooled to a level beneficial to the area as a whole and is now broadly considered a success by its residents and staff (Tindal, 2013).

HRM has measured its success post-amalgamation through many KPIs internally, and externally through partnerships with NGOs and business organizations. The municipality's current internal indicators fall under six thematic breakdowns including culture and heritage, economy and finance, environment, services and infrastructure, settlement, and transportation, referenced in its strategic plan (HRM, 2019). The purpose of these bi-annual indicators is reported by HRM to

ensure transparency, to promote the municipality, to measure success and resiliency, and to inform and engage the public (HRM, 2019). The vast majority of HRM's external indicators are developed in collaboration with the Halifax Partnership, and represent a comprehensive list related to economic development in the municipality, while also touching on sociocultural indicators of success as outcomes (Halifax Partnership, 2019). HRM's internal indicators should be seen as inputs and outputs directly under the scope of municipal government in Nova Scotia; whereas the Halifax Partnerships are focussed on external indicators or community outcomes that can be influenced by the municipality but are not directly under its control.

In addition, as a Nova Scotia municipality, HRM has access to the province's Financial Condition Indicators (FCIs) that provide a holistic analysis of fiscal performance.

### 5.2.1 Examples of Indicators by Theme

#### Governance:

- N/A

#### Service and Infrastructure Provision:

- New roads accepted by HRM (km)
- Percentage of population served by a central sewer
- Percentage of population served by central water
- Value of servicing upgrades within the Regional Centre
- Trails/greenways, bike lanes, and sidewalks (km) by subregion
- Number of water treatment facilities
- Total water use per capita (in litres per capita per day)
- Age of water and sewer infrastructure by sub-region within Urban Settlement Designation
- Percentage of population obtaining water from private wells
- Percentage of population on a private septic system
- Tonnage of solid waste generated
- Tonnage of solid waste processed at solid waste facility

#### Economics, Finances, and Taxation:

- Percentage of employed persons and unemployed persons by sub-region
- Commercial growth by square foot within the Regional Centre
- Number of new businesses starts and business failures
- Number of Business Improvement Districts
- Commercial growth by sub-region (building permits)
- Employment density in Regional Centre and Urban Settlement Designation
- Number of flights at the airport, shipping tonnage at the ports, freight movement (tonnage) on trains
- Employment in the natural resource sector (direct and indirect jobs)
- Value and diversity of natural resource export
- HRM investment in capital and operating programs in the Regional Centre
- Cost of housing relative to income by growth centre

- Percentage of rental housing and percentage home ownership
- Number of dwellings by type by sub-region
- Average value of owned dwellings
- Number of beds in homeless shelter and number of beds occupied
- Households in core housing need
- Financial Condition Indicators

Staff and Administrative Structure:

- N/A (Internal use only)

Sociocultural Identity and Concerns of Citizens:

- Population growth by growth centre
- Population growth by age
- Aging population by income and activity level
- Resident satisfaction with quality of life by sub-region
- Resident satisfaction with built environment
- Number of HRM-organized civic events and number of participants
- Number of HRM-offered arts and cultural programs and number of participants
- Number of recreation programs and number of participants
- Municipal investment in culture per capita
- Number of HRM-supported events and participants
- Number of HRM-supported public art installations
- Number of people employed in culture, arts and recreation
- Priority for cultural attractions
- Number of tourists
- Development of special arts and culture advisory committee (implementation of recommendations)
- Completion of culture and heritage inventory
- Number of heritage sites, heritage buildings and cultural landscapes designated

### 5.3 Cape Breton Regional Municipality (Nova Scotia)

CBRM meets four of the five possible inclusion criteria, apart from being involuntary. CBRM is another example of Nova Scotia municipal restructuring. The municipality is the second largest geographically in Nova Scotia after HRM, and was established in 1995 following the amalgamation of the City of Sydney, the Towns of Dominion, Glace Bay, Louisburg, New Waterford, North Sydney, Sydney Mines, and the County of Cape Breton (McCinnis, 2012). The economy of the area has traditionally relied on coal, steel and fishing. The area has struggled to find an alternative as several of these industries have experienced a decline (McCinnis, 2012). Due in part to the struggling economy, the area has also experienced population decline. Over the last 20 years since consolidation, the population has fallen by nearly 20% (Hoath & McIntosh, 2018). The consolidation was suggested at the time to address the large number of special purpose bodies needed to provide services in the region, with an expectation that it would provide cost savings

(Tindal, 2013). Due to external forces such as adjustments to municipal-provincial service swaps, these savings did not materialize to what was expected, although efficiencies in service delivery were achieved (Tindal, 2013).

Regarding the measurement of merger success post-consolidation, CBRM has relied on external studies and reports to measure success, while lacking a central dashboard or strategic document that outlines indicators (CBRM, n.d.). However, the recent CBRM Viability Study has acknowledged the lack of indicators, while providing suggestions regarding financial measurements of success, strategic prioritization through asset planning, and long-term success broadly (Grant Thornton, 2019). Furthermore, as a Nova Scotia municipality, CBRM has access to the province's Financial Condition Indicators (FCIs) that provide a holistic analysis of fiscal performance.

The Viability Study also highlights key expectations of the consolidation that have remained elusive, namely concerns around community identity (Grant Thornton, 2019).

### 5.3.1 Examples of Indicators by Theme

#### Governance:

- Number of special purpose bodies

#### Service and Infrastructure Provision:

- N/A

#### Economics, Finances, and Taxation:

- Financial Condition Indicators
- Internal Accounting Indicators

#### Staff and Administrative Structure:

- N/A

#### Sociocultural Identity and Concerns of Citizens:

- N/A

## 5.4 Region of Queens Municipality (Nova Scotia)

The Region of Queens Municipality (RQM) meets all inclusion criteria. RQM was formed through the consolidation of the Town of Liverpool and Municipality of the County of Queens in the 1996. The regional municipality of Queens was the first voluntary amalgamation in Nova Scotia (Tindal, 2013). The population, geographic size, and urban-rural composition are all comparable to the Consolidated Municipality. Forestry is an important part of the local economy, along with agriculture, tourism, and fishing. Queens has been widely held as an example of a successful amalgamation by academics, staff, and residents, having achieved expectations of more equitable services, some economies of scale, removal of intermunicipal conflict, and increased ability to promote the municipality (Tindal, 2013).

Regarding the measurement of merger success post-consolidation, RQM has focussed its external-facing indicators on finances and taxation, although there is recognition from

consultations with the municipality that other indicators are measured internally. No single comprehensive list, website page, or dashboard exists as of December 2019 to illustrate these any of these indicators, although some may be found in budget review documents available on their site (RQM, April 2018).

In addition, as a Nova Scotia municipality, RQM has access to the province's Financial Condition Indicators (FCIs) that provide a holistic analysis of fiscal performance.

#### 5.4.1 Examples of Indicators by Theme

Governance:

- N/A

Service and Infrastructure Provision:

- N/A

Economics, Finances, and Taxation:

- Financial Condition Indicators
- Internal Accounting Indicators

Staff and Administrative Structure:

- N/A

Sociocultural Identity and Concerns of Citizens:

- N/A

### **5.5 Chatham-Kent (Ontario)**

The municipality of Chatham-Kent meets three out of the five inclusion criteria. The municipality was created with the provincially imposed consolidation of 23 municipalities in 1998 (Tindal, 2013). Chatham-Kent is one of the many Ontario municipalities that were amalgamated in the 1990s, but one of the few that were restructured as a single-tier municipality.

After amalgamation, the municipality began a new approach to public administration by implementing the business unit model, similar to HRM, whereby each unit was responsible for setting key performance indicator to provide quantitative weight to goals outlined in their strategic plan (Tindal, 2013). Under this regime, KPIs and corresponding targets were established for each service provided and infrastructure maintained by the municipality, and are reported on annually (Public Sector Digest, February 2018). In addition to these inputs and outputs, Chatham-Kent has developed a community index in partnership with NGOs and businesses called CK Counts, which provides indicators for community success that can be influenced by the municipality (Chatham-Kent, September 2019). These indicators are primarily socioeconomic centred.

Financial indicators are also used by the municipality, including a per capita financial position index (Chatham-Kent, 2018).

### 5.5.1 Examples of Indicators by Theme

#### Governance:

- N/A

#### Service and Infrastructure Provision:

- Percentage of total reinvestment compared to asset replacement value
- Completion of strategic plan objectives (related to roads, and bridges & culverts)
- Annual revenues compared to annual expenditures
- Annual replacement value depreciation compared to annual expenditures
- Cost per capita for roads, and bridges & culverts
- Maintenance cost per square metre
- Revenue required to maintain annual network growth
- Total cost of borrowing vs. total cost of service
- Overall Bridge Condition Index (BCI) as a percentage of desired BCI
- Percentage of road network rehabilitated/reconstructed
- Percentage of paved road lane kilometres rated as poor to very poor
- Percentage of bridges and large culverts rated as poor to very poor
- Percentage of asset class value spent on O&M
- Percentage of roads inspected within the last five years
- Percentage of bridges and large culverts inspected within the last two years
- Operating costs for paved lane per kilometres
- Operating costs for bridge and large culverts per square metre
- Percentage of customer requests with a 24-hour response rate
- Recycling rates
- Waste diversion rates

#### Economics, Finances, and Taxation:

- Per capita breakdowns
- Internal Accounting Indicators
- Median household income
- Median individual income
- Value of construction projects
- Average price of homes sold (annual)

#### Staff and Administrative Structure:

- N/A

#### Sociocultural Identity and Concerns of Citizens:

- Percentage of seniors residing in municipality
- Post-secondary education completion rate
- Unemployment rate
- Percentage of people that feel they have workplace stress
- Percentage of population that are active

- Percentage of households facing food insecurity
- Violent crime index
- Number of fires
- Km of walking trails
- Number of people who used free recreational and leisure programs
- Social housing waitlist
- Percentage of people who feel community belonging
- Percentage of people satisfied with their life in the municipality
- Number of households stabilized (homelessness)

## 5.6 Prince Edward County (Ontario)

Prince Edward County meets three of the five inclusion criteria. The municipality was amalgamated in 1998 under provincial imposition and negotiations. This consolidation brought together nine rural municipalities located around the urban centre and county seat of Picton. Since then, the single-tier municipality has measured the success of their merged county, which has been viewed by other jurisdictions as a success story of Ontario amalgamations (Bertrim, 2019).

The County has established a Community Development Department to measure and promote these evaluations. The Department in conjunction with community and business partners operate the Community and Economic Development Commission, a special body tasked with using grassroots-created indicators to measure the success of the municipality (PEC, 2018). Indicators implemented by the municipality are primarily economic development focussed, using key performance indicators related to services, demographics, cost of living, job opportunities, and housing statistics (PEC, 2017). In addition, other indicators with more governance and social aspects are also used by the department, including voter turnout, volunteerism statistics, and youth retention statistics (PEC, 2017).

### 5.6.1 Examples of Indicators by Theme

#### Governance:

- Number of seats on youth council

#### Service and Infrastructure Provision:

- N/A

#### Economics, Finances, and Taxation:

- Financial Information Return (AMOS)
- Internal Accounting Indicators
- Number of marketing materials distributed
- Number of business start-up inquiries (potential \$ amount as well)
- Number of visitors/tourists (tracked using hotspot sensors)
- Job fair participation rate
- Number of jobs
- Number of employers
- Average size of businesses (Number of people employed)

- Average home prices
- Percentage of homes selling for listed price vs over

Staff and Administrative Structure:

- Number of County jobs

Sociocultural Identity and Concerns of Citizens:

- Number of social media impressions
- Number of visits to youth centres
- Youth volunteerism rate
- Youth employment rate
- Demographics (median age, age distribution, etc.)

## 5.7 Quinte West (Ontario)

The City of Quinte West, located approximately halfway between Ottawa and Toronto, was formed in 1998 through the amalgamation of the former City of Trenton, the Village of Frankford and the Townships of Sidney and Murray (Osborne, 2012). The merger of Quinte West combined an urban and rural community (City of Quinte West, n.d.a). The Consolidated Municipality and Quinte West are also comparable in terms of demography and location relative to a big city. While the Consolidated Municipality is located directly along Highway 101 and within one-hour of Halifax, the city of Quinte West is located directly along Highway 401 and is 1.5 hours east of Toronto (Bay of Quinte, n.d.). According to the city's Community Profile, following municipal amalgamation the City of Quinte West has "thrived" (City of Quinte West, 2019). It has a diverse economy related to textiles, agriculture, and telecommunications and is home to the Canadian Air Force Base CFB Trenton (Osborne, 2012).

Quinte West had historically measured its success along with most other Ontario municipalities in accordance with Section 299 of the Municipal Act, 2001, before the Municipal Performance Measurement Program was removed in 2015 (City of Quinte West, n.d.b). It is evident from examining strategic plans, reports, and past databases that information needed for external facing indicators are collected and used in the municipality but are no longer available to the public following the change in provincial policy.

### 5.7.1 Examples of Indicators by Theme

Governance:

- N/A

Service and Infrastructure Provision:

- N/A

Economics, Finances, and Taxation:

- N/A

Staff and Administrative Structure:

- N/A

Sociocultural Identity and Concerns of Citizens:

- N/A

**5.8 Norfolk County (Ontario)**

Norfolk County is a rural single-tier municipality on the north shore of Lake Erie in Southwestern Ontario (Norfolk County, n.d.). For several years in the late 20th century, the county was forcibly merged with Haldimand County, but the merged entity was dissolved in 2000 (Tindal, 2013). However, the Townships of Delhi and Norfolk, the Town of Simcoe, and the western half of the City of Nanticoke were amalgamated to form the Town of Norfolk following this restructuring, opting for the name of Norfolk County (Norfolk County Council, 2019). The primary tourist attractions are the ports, towns and villages along Lake Erie, which the municipality promotes as "Ontario's South Coast" (Norfolk County, n.d.). To measure the success of the municipality, Norfolk participates in the provincial Ministry of Municipal Affairs and Housing's Financial Information Return (FIR) (Ontario Municipal Affairs, May 2019). It is clear from strategic and economic development plans that the municipality uses and measures indicators to pursue outlined goals, but the information is not accessible to the public (Norfolk County Council, 2019). In their economic development plan this is acknowledged, and the County states their desire to join the World Council on City Data (WCCD), which provides a dashboard to display and compare indicators that the municipality has access to (Norfolk County, June 2019). These indicators are still tentative as Norfolk is not included on WCCD's website yet as of December 2019 (WCCD, 2019). However, WCCD's indicators will be used for the scan under the assumption that they are implemented in accordance with the report's recommendation.

5.8.1 Examples of Indicators by Theme (Tentative to WCCD Registration)

Governance:

- Voter participation in last municipal election (as a percentage of eligible voters)
- Women as a percentage of total elected to city-level office
- Percentage of women employed in the city government workforce
- Number of convictions for corruption and/or bribery by city officials per 100,000 population
- Citizens' representation: number of local officials elected to office per 100,000 population
- Number of registered voters as a percentage of the voting age population

Service and Infrastructure Provision:

- Total residential electrical energy use per capita (kWh/year)
- Percentage of city population with authorized electrical service
- Energy consumption of public buildings per year (kWh/ m<sup>2</sup>)
- Percentage of total energy derived from renewable sources, as a share of the city's total energy consumption
- Total electrical energy use per capita (kWh/year)
- Average number of electrical interruptions per customer per year
- Average length of electrical interruptions (in hours)

- Number of firefighters per 100,000 population
- Number of fire related deaths per 100,000 population
- Number of natural disaster related deaths per 100,000 population
- Number of volunteer and part-time firefighters per 100,000 population
- Response time for emergency response services from initial call
- Response time for fire department from initial call
- Percentage of city population with regular solid waste collection (residential)
- Total collected municipal solid waste per capita
- Percentage of the city's solid waste that is recycled
- Percentage of the city's solid waste that is disposed of in a sanitary landfill
- Percentage of the city's solid waste that is disposed of in an incinerator
- Percentage of the city's solid waste that is burned openly
- Percentage of the city's solid waste that is disposed of in an open dump
- Percentage of the city's solid waste that is disposed of by other means
- Hazardous Waste Generation per capita (tonnes)
- Percentage of the city's hazardous waste that is recycled
- Kilometres of high capacity public transport system per 100,000 population
- Kilometres of light passenger public transport system per 100,000 population
- Percentage of city population served by wastewater collection
- Percentage of the city's wastewater that has received no treatment
- Percentage of the city's wastewater receiving primary treatment
- Percentage of the city's wastewater receiving secondary treatment
- Percentage of the city's wastewater receiving tertiary treatment
- Percentage of city population with potable water supply service
- Percentage of city population with sustainable access to an improved water source
- Percentage of population with access to improved sanitation
- Total domestic water consumption per capita (litres/day)
- Total water consumption per capita (litres/day)
- Average annual hours of water service interruption per household
- Percentage of water loss (unaccounted for water)

Economics, Finances, and Taxation:

- Financial Information Return
- Assessed value of commercial and industrial properties as a percentage of total assessed value of all properties
- City's unemployment rate
- Percentage of city population living in poverty
- Percentage of persons in full-time employment
- Youth unemployment rate
- Number of businesses per 100,000 population
- Number of new patents per 100,000 population per year

- Total city population
- Land area
- Population density
- Country gross domestic product
- City gross operating budget
- City gross capital budget
- Percentage of country's population
- Annual population change
- Population dependency ratio
- Total number of households
- Person per unit
- Total number of occupied dwelling units (owned and rented)
- Dwelling density per sq/km
- Average household income (USD)
- City product per capita (USD)
- Employment annual percent change - based on last 5-year data
- Annual inflation rate - average last 5 years
- Income distribution (GINI Coefficient)
- Country GDP per capita (USD)
- City product as a percent of country's GDP
- Debt service ratio (debt service expenditure as a percentage of a municipality's own- source revenue)
- Capital spending as a percentage of total expenditures
- Own-source revenue as a percentage of total revenues
- Tax collected as a percentage of tax billed
- Percentage of city population living in slums
- Number of homeless per 100 000 population
- Percentage of households that exist without registered legal titles
- Annual number of public transport trips per capita
- Number of personal automobiles per capita
- Percentage of commuters using a travel mode to work other than a personal vehicle
- Areal size of informal settlements as a percentage of city area
- Jobs/housing ratio

Staff and Administrative Structure:

- N/A

Sociocultural Identity and Concerns of Citizens:

- Percent of population that are youth aged 15-24
- Percent of population that are seniors aged 65+
- Percent of population foreign born
- Percent of population that are new immigrants
- Percent of population that are children aged 0-14
- Percent of population that are adults aged 25-64

- Male to Female ratio (number of males per 100 females)
- Fine particulate matter (PM2.5) concentration
- Particulate matter (PM10) concentration
- Greenhouse gas emissions measured in tonnes per capita
- NO2 (nitrogen dioxide) concentration
- SO2 (sulphur dioxide) concentration
- Noise pollution
- Percentage change in number of native species
- Average life expectancy
- Number of in-patient hospital beds per 100,000 population
- Number of physicians per 100,000 population
- Under age five mortality per 1,000 live births
- Number of nursing and midwifery personnel per 100,000 population
- Number of mental health practitioners per 100,000 population
- Suicide rate per 100,000 population
- Square meters of public indoor recreation space per capita
- Square meters of public outdoor recreation space per capita
- Number of police officers per 100,000 population
- Number of homicides per 100,000 population
- Crimes against property per 100,000
- Response time for police department from initial call
- Violent crime rate per 100,000 population
- Number of internet connections per 100,000 population
- Number of cell phone connections per 100,000 population
- Number of landline phone connections per 100,000 population
- Kilometres of bicycle paths and lanes per 100,000 population
- Transportation fatalities per 100,000 population
- Commercial air connectivity (number of non-stop commercial air destinations)
- Green area (hectares) per 100,000 population
- Annual number of trees planted per 100,000 population

### 5.9 Kawartha Lakes (Ontario)

The City of Kawartha Lakes was formed in 2001 from the amalgamation of 18 townships within the former County of Victoria, in Ontario (Welch & Payne, 2012; Neptis Foundation, 2014). In contrast to the merger of the Town of Windsor and the Municipality of the District of West Hants, this was a forced amalgamation that caused tremendous public disagreement (Gray, 2003). Similar to the merger of the Consolidated Municipality, however, the merger of Kawartha Lakes brought together a mixture of urban and rural communities (Welch & Payne, 2012). In the southern part of the Kawartha Lakes, dairy and cattle farms are common whereas in the northern part, the economy is dependent on tourism and recreation (Welch & Payne, 2012).

Manufacturing is also an important industry; between 2012 and 2016, the number of manufacturing jobs in Kawartha lakes grew by 34 percent (City of Kawartha Lakes, n.d.a). In

terms of location, the City of Kawartha Lakes is located 1.5 hours Northeast of Toronto (City of Kawartha Lakes, n.d.b). Since amalgamation, the city has grown by approximately 6000 people (City of Kawartha Lakes, n.d.c).

To measure the success of the municipality, Kawartha Lakes has developed a workforce evaluation dashboard that uses census data to illustrate key workforce indicators (Kawartha Lakes Economic Development, 2016). The City has also created committees to partner with local communities and businesses to measure socioeconomic indicators with funding from the province (Kawartha Lakes Economic Development, n.d.). These indicators are found within strategic plans. The municipality also provides information to the province for FIRs (Ontario Municipal Affairs, May 2019).

### 5.9.1 Examples of Indicators by Theme

#### Governance:

- N/A

#### Service and Infrastructure Provision:

- N/A

#### Economics, Finances, and Taxation:

- FIRs
- Percentage of population achieving certain level of education
- Percentage of population in given occupation
- Number of people in a given industry
- Commute times (work)
- Primary mode of transport
- Number of households (and type)
- Income distribution (%)
- Household annual expenditures (\$) breakdown by good/service

#### Staff and Administrative Structure:

- N/A

#### Sociocultural Identity and Concerns of Citizens:

- Population
- Daytime Population
- Median Age
- Age distribution
- Family Structure and Marital Status
- Housing Tenure and Dwelling Characteristics
- Ethnic origins

## 5.10 Best Practices and Lessons Learned

From examining these jurisdictions, common elements may be noted. One such example includes the perception of success. The belief that a municipality has succeeded or faltered after the act of consolidation has much to do with how the process was framed or promoted pre-consolidation. This ties in with the discussion about consolidation expectations in the literature review, primarily the validity and feasibility of anticipated results. For example, the most commonly used criteria for a successful or failed amalgamation is the generation of cost savings. However, many external economic forces impact a municipality's finances, which could sway their fiscal state positively or negatively, regardless of the merger's effects on resource efficiencies. This is the case in CBRM, and many other Ontario municipalities referenced in the literature review, that were presupposed with cost savings that never materialized despite being heavily promoted. By not managing expectations of consolidation accordingly, perceptions of success can be unnecessarily damaged. Not only that, but it can also retract from other positive externalities of consolidation that were not as eagerly advertised at the outset of amalgamation, such as the removal of inter-municipal conflict or more equitable service provision, that are of tangible benefit to citizens post-consolidation.

Regarding indicators, the examined municipalities also share commonalities. Financial inputs were a common theme throughout each municipality examined, primarily due to the mandated nature of reporting legislated by the provincial governments of Nova Scotia and Ontario. Governance, staff, and service provision were typically the most neglected measurement themes from the jurisdictions examined, with only the most comprehensive municipalities of HRM, Chatham-Kent, Prince Edward County, and Norfolk County (tentatively) employing external-facing indicators related to these areas. These jurisdictions generally had more robust reporting centred on their strategic plan and could therefore more easily track progress in regard to priority areas, a desire touched upon in CBRM's aforementioned Viability Study (Grant Thornton, 2019). The tracking of this information is also typically accompanied by provincial funding especially in the Ontario municipalities examined, so it may be a matter of affordability.

Municipal measurement of community outcomes that may be influenced but are inherently outside of local jurisdictional scope, can and is used by municipalities to petition or lobby other orders of government for assistance in tackling issues. This is accomplished by reinforcing awareness of the problem at hand, while demonstrating that the municipality is willing to help through collaborative intergovernmental partnerships.

Best practices examined include the measurement of demographics, economic development inputs and outputs, and sociocultural community outcomes. The inclusion of outcomes is also important, as it is the most easily recognized by community members and can act as an aspiration for input and output indicators. Furthermore, any indicator that could acknowledge the expected cost-saving effects of amalgamation should be included, as responsible fiscal management as it relates to the tax rate is typically top of mind for citizens. This is demonstrated by its inclusion in every municipality's indicators. The most impactful practice utilized by municipalities examined was ensuring that the indicators used were external-facing and easily accessible, to ensure transparency and accountability post-consolidation when determining the level of success achieved.

## 6. RESULTS

### 6.1 Defining Success

The purpose of this project was to develop performance metrics that could be used in the future (2025, 2030 and beyond) to determine whether the consolidation of the Town of Windsor and the Municipality of the District of West Hants has been successful. Although this project was focussed on the consolidation of the two municipalities, it is hoped that these indicators can be used by other municipalities seeking to restructure.

When governments and businesses create indicators to measure success, they do so by first defining a clear mission statement and strategy as well as specific goals that need to be met to achieve their overall mission (Chan, 2004; New Zealand Government, 2008; Government of Canada, 2010; Public Health Ontario, 2016). Organizations then set specific targets to achieve their goals and create indicators to measure whether those targets are being achieved (Balanced Scorecard Institute, n.d.; & Government of Canada, 2010) Essentially, the achievement of their specified goals and targets is defined as successful.

What indicators can be used to measure success in the context of a municipal consolidation was established in two ways. First, by determining what the Consolidated Municipality seeks to achieve from consolidation, which represents the Consolidated Municipality's vision and goals and second, by understanding some general expectations and successes and failures of municipal consolidations in the literature. The desired outcomes for the Consolidated Municipality have been described in vision section of the paper (section 1.2). They include growing infrastructure, employment, education and industry, and having a stronger voice and regional presence, amongst other things. It is therefore important to create indicators to measure whether these desired outcomes are being achieved. Whether or not the consolidation is viewed as "successful" would be determined according to whether specific targets that the consolidated Municipality would set, have been met.

Based on the literature review of other single-tier Canadian municipalities that have undergone consolidation, the primary expectations and concerns of municipal consolidations revolve around three main elements: (1) cost savings, (2) tax structure, and (3) citizen satisfaction with regard to tax structure, equitable service delivery, and their sense of community. Municipal consolidations that have been deemed as successful in the literature are generally able to achieve cost savings, maintain or decrease the tax rate, and provide equitable services to citizens in urban and rural communities, all of which makes citizens satisfied. Although achieving cost savings and maintaining or decreasing the tax rate is not a specified outcome in the Consolidated Municipality's vision and goals for consolidation, these are important elements to measure because they will determine if citizens are satisfied. Moreover, the issue of cost savings and the fluctuation of the tax rate are such important points in the discussion of municipal consolidations that if other municipalities considering governance reform are to assess how successful the Consolidated Municipality is, they will certainly be curious to understand if cost savings were achieved and how the tax rate changed.

The analysis section of the paper provided an understanding of what elements can be used to measure success in the context of the Consolidated Municipality. From the municipality's standpoint, success is achieved when the desired outcomes and targets based on the Consolidated Municipality's vision and goals have been met. From the perspective of the literature, success is associated with cost savings, tax rate fluctuation and citizen satisfaction. For this project, the authors of this report have chosen to consider success as an inclusion of both those viewpoints. As such, the Consolidated Municipality's success could be measured through indicators that reveal how employment, infrastructure, employment, education and industry has grown; as well as if a stronger regional presence has been achieved, and if cost savings, tax rate, and citizen satisfaction have been achieved. It is recommended that the Consolidated Municipality set specific targets for each of these indicators as is typically done when governments and businesses hope to measure success.

## 6.2 Choosing a Performance Measurement Framework

As described in the literature review, there exist several different options of performance measurement frameworks. Certain municipalities within Canada, one of them being HRM, are currently using Municipal Benchmarking Network (MBN) Canada as a municipal performance measurement framework (MBN Canada, 2018). Another performance measurement framework, which has supposedly increased in popularity within the public sector, is the Balanced Scorecard Approach (Sharma, & Gadenne, 2011). Neither of these performance measurement frameworks was chosen for this project due to the specific disadvantages presented below. **A performance measurement framework was established using the Government of Canada's guidance for the development of effective performance measurement frameworks, which is comparable to the performance measurement framework guidance produced by many other organizations. Its validity was also reinforced by the Nova Scotian Department of Municipal Affairs, who specified that logic models should be used in the creation of performance indicators.**

### 6.2.1 MBN Canada Disadvantages

Although the MBN Canada framework includes a variety of valuable metrics to evaluate municipal performance, it is not particularly suited for measuring the success of municipal consolidations specifically as there is an overwhelmingly large amount of metrics and the large majority of them are quantitative measures of outputs related to service delivery (MBN Canada, 2018). As aforementioned, it was found that to evaluate the success of municipal consolidations, it is important to include measures of outcomes. For the purposes of this project, it is thus important to use a performance metric framework that includes indicators of outcomes, and this can be created using the Government of Canada and other organizations' guidance for the development of effective performance measurement frameworks.

### 6.2.2 The Balanced Scorecard Approach Disadvantages

The Balanced Scorecard (BSC) approach, described briefly in the literature review, includes outcome measures and relates performance metrics to an organization's strategic priorities (Lim, 2019). This approach could have been used to develop metrics to measure the

success of the town of Windsor and Municipality of the District of West Hants' consolidation. Unfortunately, details about how to practically apply the BSC approach to an organization are only offered through a paid online course. Because the information was not readily available for the time allotted in this course, the Balanced Scorecard approach was not chosen for this project.

### 6.3 Developing a performance measurement framework

Section 6.1 identified important outcomes to measure consolidation success, which is the first step in developing a performance measurement framework using the Government of Canada's guidance on the development of performance measurement frameworks. These desired outcomes and expectations with regard to consolidation from the point of view of both the Consolidated Municipality and the literature are needed to develop a logic model (Government of Canada, 2010; New Zealand Government, 2008). The logic model created for this project is presented in Figure 1 below.

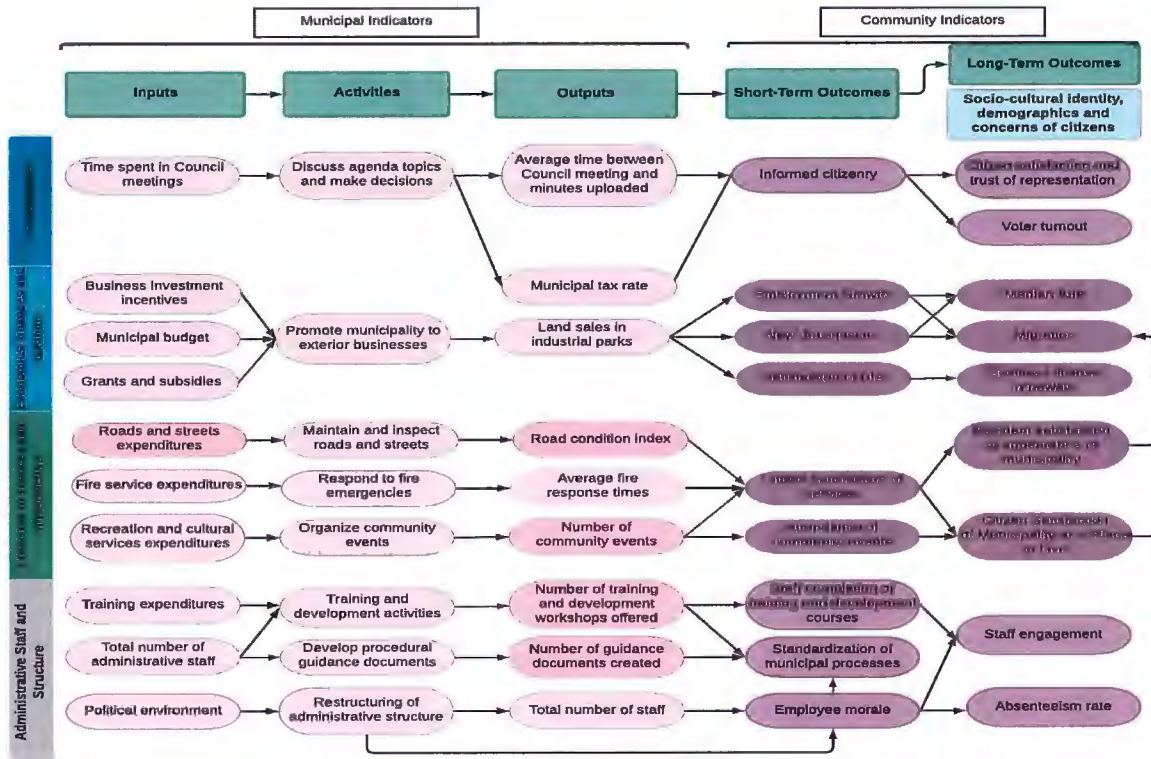


Figure 1: Logic Model

The logic model was created first, using the identified desired outcomes of municipal consolidation. Outcomes were divided into short and long-term outcomes depending on the time frame in which they can reasonably be achieved. It is expected that short-term outcomes would be noticeable within less than five years, whereas long-term outcomes may take five years or more years to truly understand if they were achieved. Working backwards from the outcomes, input and output indicators which can impact the specified outcomes, were then created. **The consultations with CBRM, HRM, RQM, and the Nova Scotia Department of Municipal Affairs reinforced the importance of establishing input and output performance metrics as indicators, because**

**these are the types of indicators that municipalities can directly influence through municipal activities.** For example, a municipality can control how much time and resources it invests into a project (input). It can also control the output, for example, the number of building permits it issues (output), or the percentage of roads plowed (output), which will thereby influence citizen satisfaction of services (outcome), and citizen satisfaction of services is an important outcome of a successful consolidations. Inspiration for the input and output indicators, as well as some of the outcome indicators, was taken from the jurisdictional scan and consultation with experts, which provided an understanding of what indicators other consolidated single-tier municipalities are measuring and reporting on. Although these municipalities measure indicators that we have chosen, none of them have formally assessed how that specific indicator relates to pre-consolidation, and the merger process as a whole.

## 7. RECOMMENDATIONS

**Using the logic model, a list of 101 indicators that can measure the success of the consolidation of the Town of Windsor and the Municipality of the District of West Hants was compiled. It is recommended by the authors of the report that they be adopted by the Consolidated Municipality (complete list can be found in Appendix A).** Although the logic model includes input indicators, it is important to note that the 101 indicators in Appendix A are *output* and *outcome* indicators. Input indicators remain consistent and are straightforward to comprehend; they include time, funds, and number of staff.

The number of indicators recommended demonstrates the complexity of municipal governance as well as the complexity of a successful consolidation. Indeed, there are many factors that can influence elements of the Consolidated Municipality's vision of growing employment, infrastructure, education and coming together as a more prosperous region. There are also many factors that determine citizen satisfaction of services, because of the multitude of services provided by a municipality.

## **8. NEXT STEPS**

### **8.1 Establishing Benchmarks**

It is recommended that the Consolidated Municipality establish indicator benchmarks as a next step. As the Town of Windsor and the Municipality of the District of West Hants are currently two separate entities, for each of the indicators in Appendix A, each entity will have their own benchmark, which will need to be combined to provide an understanding of the region prior to consolidation. For example, the population of the Town of Windsor and the population of the Municipality of the District of West Hants will need to be added together to provide a benchmark in understanding how population has grown. For other indicators, such as the percentage of customer requests addressed within 24 hours, the average percentage between the two municipalities can be used as a benchmark. It will be up to the Consolidated Municipality to determine if it should consider the average for the last year prior to consolidation only, or if it should use an average of two, three, four or five years prior to consolidation as a benchmark.

### **8.2 Establishing Targets**

It is recommended that the Consolidated Municipality establish a performance management plan in which it would set targets relative to indicator benchmarks to determine success.

### **8.3 Establishing an External Facing Dashboard**

It is recommended that the Consolidated Municipality establish an external facing dashboard to both record and present indicators to the public in an accessible way, to ensure accountability and transparency to residents as a next step.

### **8.4 Determining Reporting Mechanisms and Responsibilities**

It is recommended that the Consolidated Municipality determine reporting mechanisms and sources for indicator insights, and that responsibility for its collection is clearly communicated to applicable departments and staff.

### **8.5 Establishing a Reporting Frequency**

It is recommended that the Consolidated Municipality establish and maintain a reporting frequency for these indicators to be updated as a next step. Potential frequencies include every census year, staggered evenly with election years, annually, or biannually.

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APPENDIX A

Theme	Indicator	Input/Output/Outcome	Rationale	Short/Long-Term	Data Source
<b>Governance (NUMBER OF INDICATORS: 8)</b>					
<b>Governance</b>	Number of Special purpose bodies	Output	Reduces bureaucracy associated with intermunicipal matters; reduces expenditures; ensures matters are handled in Council and are therefore more transparent (accountable). Supported by literature review of expectations, and municipal usage by CBRM.	Short-term	Council Data
<b>Governance</b>	Cost of councillors per capita	Output	Demonstrates less cost to the taxpayer. Supported by literature review of expectations on cost savings.	Short-term	Internal
<b>Governance</b>	Number of councillors per capita	Output	Supports the cost of Councillor indicator. Can be used to demonstrate accountability when compared to provincial or federal elected counterparts (i.e. less people per official results in greater accountability). Supported by literature review on expectations and concerns of consolidation.	Short-term	Internal
<b>Governance</b>	Time spent by councillors in council (hours/year)	Output	Demonstrates an open, transparent, and accountable government. Illustrates a willingness of elected officials throughout the municipality to work together in the eyes of the public. Would illustrate removal of intermunicipal clashes which is an expectation examined in the literature review.	Short-term	Council Data

<b>Governance</b>	Time spent by councillors in meetings, in camera	Output	Demonstrates a lack of open, transparent, and accountable government. Illustrates a potential unwillingness of elected officials throughout the municipality to work together in the eyes of the public. Would illustrate extant municipal rivalries, the elimination of which is an expectation examined in the literature review.	Short-term	Council Data
<b>Governance</b>	Percentage of council meeting minutes posted online	Output	Demonstrates open, transparent, and accountable government. The added resources of combined municipalities should improve overall accountability. Would illustrate an increased service capacity in regard to governance, which is an expectation discussed in the literature review.	Short-term	Internal
<b>Governance</b>	Average time elapsed between council meetings and meeting minutes uploaded online (days)	Output	Demonstrates open, transparent, and accountable government. The added resources of combined municipalities should improve overall accountability. Would illustrate an increased service capacity in regard to governance, which is an expectation discussed in the literature review.	Short-term	Internal
<b>Governance</b>	Citizen satisfaction with municipally elected officials	Outcome	Citizen satisfaction is an important outcome to measure because it is one of the elements that determines consolidation success.	Long-term	Survey
<b>Infrastructure and Provision of Services (NUMBER OF INDICATORS: 40)</b>					
<b>Infrastructure</b>	Percentage of projects initiated within 12 months of	Output	Demonstrates municipal capacity to fulfill directives and objectives in an efficient manner. Illustrates agility of government. <b>Supported by literature review</b>	Short-term	Internal

	funding authorization			expectations on less intermunicipal conflict and bureaucracy.	Long-term	Internal
<b>Infrastructure</b>	Total number of capital assets	Output		Demonstrates the combined resources of the municipality. Provides a better understanding of assets, how to manage them strategically, and how to plan for the future. Better planning and larger resource capacity are expectations of consolidation examined in the literature review.	Long-term	Internal
<b>Infrastructure</b>	Average age of capital assets	Output		Demonstrates the state of assets owned by the municipality. Provides a better understanding of assets, how to manage them strategically, and how to plan for the future. More resources should mean a reduction in average age. Supported by expectations on service equity, conflict reduction, and competitiveness.	Long-term	FCI
<b>Infrastructure</b>	Total number of new projects	Output		Demonstrates the combined resources of the municipality. Illustrates the ability to develop new services/infrastructure for citizens. Supported by literature review on reduced conflict over external funding opportunities, and increased ability to promote the municipality.	Long-term	Internal
<b>Infrastructure</b>	Total number of municipal buildings	Output		Demonstrates the combined resources of the municipality. Provides a better understanding of assets, how to manage them strategically, and how to plan for the future.	Long-term	Internal
<b>Infrastructure</b>	Percentage of new projects completed within budget	Output		Demonstrates the fiscal restraint of the municipality, and ability to plan expenditures well. Fiscal capacity and	Long-term	Internal

<b>Infrastructure</b>	Percentage of municipal buildings that are accessible in accordance with Provincial Accessibility Standards	Output	management are expectations examined in the literature review.	Long-term	Internal
<b>Waste management</b>	Average number of people serviced per route	Output	Demonstrates the ability of the municipality given its increased resources to address the legislative requirements of the province. In addition, it illustrates the willingness and capacity of the municipality to provide equitable services to citizens. Supported by expectations on equitable services, conflict reduction, and competitiveness.	Short-term	Internal
<b>Waste management</b>	Average cost of waste management services per route	Outcome	Demonstrates level of service provided by municipality given new efficiencies and resources. Used in conjunction with average cost per route indicator. Supported by expectations on equitable service delivery and cost efficiencies, and by the jurisdictional scan.	Short-term	Internal
<b>Waste management</b>	Waste diversion rate	Output	Demonstrates ability of municipality to influence recycling rates, and thereby help the environment while saving money. Supported by literature review on expectations of cost savings, and by the jurisdictional scan.	Long-term	Internal
<b>Waste management</b>	Percentage of people aware of waste	Outcome	Demonstrates ability of municipality to market and promote itself to improve services, quality of life, and investment in the municipality.	Long-term	Survey

<b>Technology</b>	management services Usage of waste management cellular app (number of downloads)	Outcome	Demonstrates the municipality's ability to promote municipal services. Can lead to increased satisfaction of services by citizens. Supported by expectations of marketability and promotion ability examined in literature review.	Long-term	Internal
<b>Technology</b>	Number of visits to the municipal website	Outcome	Demonstrates the municipality's ability to promote municipal services. Is also an indicator of engaged citizenry. Increased number of visits could also indicate that the municipal website is useful, with a positive user experience, leading to citizen satisfaction of services. Supported by literature review on expectations regarding increased ability to promote municipality.	Long-term	Internal
<b>Technology</b>	Number of subscribers and followers on social media (Facebook, Twitter)	Output	Demonstrates the municipality's ability to promote municipal services and to engage its citizens. Supported by literature review on expectations regarding increased ability to promote municipality.	Long-term	Internal
<b>Technology</b>	Total number of homes with access to high-speed internet	Outcome	Demonstrates the municipality's commitment to growing infrastructure and bettering service provision, which is an output that would lead to overall citizen satisfaction of services. Supported by literature review on expectations regarding increased ability to promote municipality (lobby other orders of government).	Long-term	Survey

Technology	Satisfaction with municipal website	Outcome	Citizen satisfaction is an important outcome to measure because it is one of the elements that determines consolidation success.	Long-term	Survey
<b>Fire service</b>	Average fire response time	Output	Demonstrates the municipality's efficiency and effectiveness in service delivery, as well as its commitment to ensuring the safety and well-being of its residents. Supported by literature review on service equity and efficiency, as well as the jurisdictional scan.	Short-term	Internal
<b>Fire service</b>	Number of community outreach and inspection events	Output	Demonstrates the municipality's commitment to ensuring the safety and well-being of residents, which can lead to overall citizen satisfaction of services, which is an important component of successful municipal consolidations. Supported by increased staff specialization capacity, an expectation examined in the literature review.	Short-term	Internal
<b>Road service</b>	Percentage of roads inspected within the last (X) years	Output	Demonstrates the municipality's ability to maintain its roads. This can lead to resident satisfaction of services. Supported by the literature review and jurisdictional scan.	Long-term	Internal
<b>Road service</b>	Percentage of bridges and culverts inspected within the last (X) years	Output	Demonstrates the municipality's to maintain its infrastructure. Inspecting bridges and culverts is the first step in maintaining them, which can lead to resident satisfaction of services. Supported by literature review and jurisdictional scan.	Long-term	Internal

<b>Road service</b>	Average cost per km of road maintained	Output	Demonstrates the municipality's investments in maintaining its infrastructure. Is one element that would lead to overall citizen satisfaction of services, which is an important component of successful municipal consolidations. Also demonstrates efficiency in service delivery, which relates to cost savings, an expectation of municipal consolidations. Also supported by jurisdictional scan.	Short-term	Internal
<b>Road service</b>	Percentage of total road (km) plowed	Output	Demonstrates the municipality's commitment to improving services for its residents and is one element that would lead to overall citizen satisfaction of services, which is an important component of successful municipal consolidations.	Short-term	Internal
<b>Road service</b>	Road Condition Index	Outcome	Demonstrates the municipality's investments in its roads and maintaining its infrastructure. This leads to citizen satisfaction of services, which is an important component of successful municipal consolidations.	Long-term	Internal
<b>Road service</b>	Percentage of customer requests addressed within 24 hours	Output	Demonstrates the capacity of the municipality to provide services given larger resource availability. Supported by expectations examined in literature review.	Short-term	Internal
<b>Water and storm service</b>	Number of homes with wastewater collection	Output	Expanding the number of homes that have access to wastewater collection demonstrates an improvement in municipal service delivery, which can lead	Long-term	Internal

				to increased satisfaction of citizens, an important component of municipal consolidations. This is supported by expectations on equitable service delivery in the literature review. Also supported by jurisdictional scan.			
<b>Water and storm service</b>	Operating costs for the distribution of drinking water per kilometre of water distribution pipe	Output	Output	Demonstrates the municipality's investments in its water and storm services. Also demonstrates efficiency in service delivery, which relates to cost savings, an expectation of municipal consolidations. Supported by jurisdictional scan.	Short-term	Internal	
<b>Water and storm service</b>	Hours of water service interruption	Output	Output	Demonstrates municipality's ability to deliver services to citizens effectively. Supported by literature review.	Short-term	Internal	
<b>Water and storm service</b>	Percentage of residents' complaints addressed within 24 hours	Output	Output	Demonstrates municipality's ability to deliver services effectively. Satisfaction of services is an important component of successful municipal consolidations. Supported by literature review.	Long-term	Internal	
<b>Recreational services</b>	Percentage of youth participating in recreational programs	Outcome	Outcome	Indicates that the municipality is improving the promotion of recreational programs and that citizens are satisfied with the quality of recreational programs. Citizen satisfaction is an important component of municipal consolidation success. <b>Supported by</b> literature review.	Long-term	Internal	
<b>Recreational services</b>	Citizen satisfaction with recreation	Outcome	Outcome	Citizen satisfaction with services is an important component of municipal consolidation success. Supported by literature review.	Long-term	Survey	

	infrastructure (indoor/outdoor)	Outcome		Long-term	Internal
<b>Recreational services</b>	Percentage of dates booked in municipal facilities (pool, arena, gyms, theatres, etc)	Outcome	Indicates that citizens are satisfied with municipal recreational facilities, and citizen satisfaction with services is an important component of municipal consolidation success. Also implies that the municipality is properly maintaining its infrastructure, which is encouraging citizens to use the facilities. Supported by literature review.	Long-term	Internal
<b>Community services</b>	Number of daycare programs	Output	Demonstrates the municipality's commitment to improving service provision for young families. An increase in daycare programs could lead to increased citizen satisfaction with services, which is an important component of municipal consolidation success. This could also potentially encourage new, young families to move to the area growing the population and workforce. Supported by literature review.	Long-term	Internal
<b>Community services</b>	Number of senior care programs	Output	Demonstrates the municipality's commitment to improving service provision for seniors. An increase in senior care programs could lead to increased citizen satisfaction with services, which is an important component of municipal consolidation success. Supported by literature review.	Long-term	Internal
<b>Community services</b>	Number of community	Output	Demonstrates the municipality's commitment to building a strong and inclusive community, which is one of the	Short-term	Internal

Community services	events organized Attendance at community events and festivals as a proportion of total population	Outcome	visions and goals of the Windsor/West Hants Consolidation Indicates that citizens are satisfied with the quality of events, and citizen satisfaction is an important component of municipal consolidation success. Attendance could also demonstrate citizen engagement and can lead to the creation of a sense of community.	Long-term	Internal / Survey
Planning and transportation services	Percentage of residents who live within a 10-minute walk of a park	Output	Contributes to citizen well-being and satisfaction of residents with the municipality as a place to live.	Long-term	Internal
Planning and transportation services	Kilometers of active transportation paths (walking and biking)	Output	Demonstrates the municipality's commitment to develop active transportation networks, which are shown to improve overall well-being of residents. This could contribute to citizens' overall satisfaction of the municipality as a place to live.	Long-term	Internal
Planning and transportation services	Sum total length of each route in the public transit system	Output	Demonstrates the municipality's commitment to develop its transit infrastructure. Public transit is one of the key elements for supporting economic development of a city, which is part of the vision and goals of the Consolidated Windsor/West Hants Municipality.	Long-term	Internal
Planning and transportation services	Citizen satisfaction with transportation services	Outcome	Citizen satisfaction with services is an important component of consolidation success.	Long-term	Internal

Planning and transportation services	Percentage of workforce that relies on public transportation or active transportation for their commute to work	Outcome	Demonstrates the effectiveness of public transportation services offered by the municipality.	Long-term	Internal
<b>Economics, Finances and Taxation (NUMBER OF INDICATORS: 25)</b>					
<b>Economic development</b>	Unemployment rate	Outcome	Demonstrates municipality's ability to attract and retain labour. Indicates how the region is performing in terms of job growth, workforce retention, and regional growth. Employment growth is part of the vision and goals of the Consolidated Windsor/West Hants Municipality. Supported by literature review and jurisdictional scan.	Long-term	Internal
<b>Economic development</b>	Youth employment rate	Outcome	Demonstrates municipality's ability to attract and retain youth. Indicates how the region is performing in terms of job creation, youth retention, and regional growth. Employment growth is part of the vision and goals of the Consolidated Windsor/West Hants Municipality. Supported by literature review and jurisdictional scan.	Long-term	Internal
<b>Economic development</b>	Net employment growth	Outcome	Demonstrates municipality's ability to attract and retain labour. Indicates how the region is performing in terms of growth of jobs, retention of working population and growth of the region. Growth in	Long-term	Internal

<b>Economic development</b>	Total number of tourists (collected at Fort Edward National Historic Site or Chimeczuk Museum)	Outcome	employment is part of the vision and goals of the Consolidated Windsor/West Hants Municipality. Supported by literature review and jurisdictional scan. Demonstrates the region's ability to promote itself as an attractive destination within Nova Scotia. An increase in tourism also contributes to economic growth of the region by increasing employment. This overall growth aligns with the Consolidated Windsor/West Hants Municipality's growth goals. Supported by literature review on promotability expectations.	Long-term	Internal
<b>Economic development</b>	Value of commercial projects constructed	Outcome	Demonstrates growth in the region, which aligns with the vision of growth, strength and prosperity of the Consolidated Windsor/West Hants Municipality. Supported by literature review and jurisdictional scan.	Long-term	Internal
<b>Economic development</b>	Storefront vacancy rate	Outcome	Demonstrates municipality's ability to support industry. Reflects changing market trends, consumer habits, rental incomes, shift in consumer habits, and taxes in the area. Supported by literature review on promotability and jurisdictional scan.	Long-term	Internal
<b>Economic development</b>	Number of new businesses in the region	Outcome	Demonstrates municipality's ability to attract and retain businesses. Illustrates business growth, which aligns with the vision of growth, strength, and prosperity of the Consolidated Municipality.	Long-term	Internal

<b>Economic development</b>	Percentage of business licence renewals	Outcome	Supported by literature review and jurisdictional scan. Demonstrates the existence of a favourable business environment, which is an important element in fostering industry growth. This is a part of the vision and goals of the Consolidated Windsor/West Hants Municipality.	Long-term	Internal
<b>Economic development</b>	Business Improvement Area (BIA) satisfaction	Outcome	Demonstrates if property owners and tenants within the municipality are satisfied with the municipality's efforts to attract shoppers, diners, tourists and new businesses to the area. BIA satisfaction could be an indication that the municipality is working in the right direction toward its growth goals. Supported by literature review and jurisdictional scan.	Long-term	Survey
<b>Economic development</b>	Land sales for commercial purpose	Outcome	Demonstrates municipality's ability to promote the area as an attractive place to develop. If businesses are establishing factories and offices in the municipality, and if they view the region as an ideal market.	Long-term	Internal
<b>Economic development</b>	Net migration rate	Outcome	Demonstrates municipality's ability to promote the area as an attractive place to live. Supported by literature review and jurisdictional scan.	Long-term	Internal
<b>Workforce</b>	Total workforce	Outcome	Demonstrates available labour in relation to total population. This is important for long term viability of the municipality. Supported by literature review and jurisdictional scan.	Long-term	Internal

Workforce	Resident satisfaction with municipality as a place to work	Outcome	Indicates if the municipality possesses desirable and fulfilling employment opportunities. Supported by literature review and jurisdictional scan.	Long-term	Survey
<b>Finances</b>	Total grants, subsidies, and transfers as a percentage of total revenue)	Outcome	This shows the amount of funds the municipality receives from other orders of government and other organizations to fund its programs and objectives. Demonstrates ability to draw more external funding municipality as an expectation of municipal mergers noted in the literature review..	Short-term	Internal
<b>Finances</b>	Value of grants received	Outcome	Another way of demonstrating the ability of the municipality to draw external funding, which is an expectation of municipal mergers. Supported by literature review and jurisdictional scan.	Short-term	Internal
<b>Finances</b>	Debt-to-equity ratio	Outcome	Demonstrates the level of debt owed by the municipality to finance its programs or resources compared to total worth, which is an indicator responsible fiscal management. Supported by literature review and jurisdictional scan.	Long-term	Internal
<b>Finances</b>	Property taxes (Tax Rate/Total Taxable Property Amount)	Output	Demonstrates the total assessed value of property within the municipality, and therefore the base of revenue generation. Supported by literature review and jurisdictional scan.	Long-term	Internal
<b>Finances</b>	Capital expenditure	Output	Demonstrates the amount spent on infrastructure by the municipality. Indicates greater capacity for investment. Supported by literature review and jurisdictional scan.	Short-term	Internal

<b>Finances</b>	Self-generated revenue	Outcome	Demonstrates the amount of revenue generated solely by the municipality through taxes, user fees, and donations. Illustrates self-sufficiency and resiliency of the municipality. Supported by literature review and jurisdictional scan.	Long-term	Internal
<b>Finances</b>	Taxes collected per capita	Output	Indicates the average tax rate per person which impacts overall satisfaction. Supported by literature review and jurisdictional scan.	Long-term	Internal
<b>Finances</b>	Debt per capita	Output	Demonstrates the amount of debt accumulated by the municipality as the amount each resident would have to pay to ameliorate it. This is an indicator of whether the Consolidated Windsor/West Hants municipality is achieving its vision of growth and prosperity. Supported by literature review and jurisdictional scan.	Long-term	Internal
<b>Finances</b>	Total revenue generated	Outcome	Demonstrates the financial viability of the municipality. Supported by literature review and jurisdictional scan.	Long-term	Internal
<b>Finances</b>	Total reserves	Output	Indicates the amount saved by the municipality for investments and emergency situations. Supported by literature review and jurisdictional scan.	Long-term	Internal
<b>Finances</b>	Percentage of capital projects completed within project budget	Output	Demonstrates ability to plan expenditures well. Supported by literature review.	Short-term	Internal
<b>Finances</b>	Total municipal expenditures	Output	Demonstrates the amount spent by the municipality. Indicates greater capacity	Short-term	Internal

			for investment. Supported by literature review and jurisdictional scan.	
<b>Administrative Staff and Structure (NUMBER OF INDICATORS: 13)</b>				
<b>Organizational Structure</b>	Total number of administrative staff	Outcome	Due to the change in government structure, the number of administrative staff are expected to fluctuate due to voluntary resignations or retirements. This may also change over time as staff retires but does not need to be replaced due to reduced bureaucracy. Alternatively, the municipality may grow so additional staff will be needed to support the growth. Total number of administrative staff needed has an impact on overall cost savings. Supported by literature review and jurisdictional scan.	Long-term
<b>Organizational Structure</b>	Supervision rate (number of employees that a manager has to supervise on average)	Output	Is an indication of managers' workload, which influences overall employee engagement and satisfaction. Supported by literature review.	Short-term
<b>Organizational structure</b>	Percentage of vacant municipal positions filled internally through staff promotion	Output	Demonstrates succession planning, and the ability of the municipality to foster a culture of personal development and growth. Supported by literature review.	Long-term
<b>Organizational structure</b>	Number of guidance documents created	Output	Standardization of procedures is a challenge when municipalities consolidate. Guidance documents can demonstrate standardization of	Short-term
				Internal
				Internal
				Internal

<b>Organizational structure</b>	Percentage of employees who have completed training on municipal internal policies and procedures	Output	procedures, which can lead to efficiency and effectiveness of service delivery and overall cost savings, which is an expectation of municipal consolidation. Supported by literature review. Standardization of procedures is a challenge when municipalities consolidate. Employee training on internal policies and procedures can demonstrate standardization of procedures, which can lead to efficiency and effectiveness of service delivery and overall cost savings, which is an expectation of municipal consolidation. Supported by literature review.	Short-term	Internal
<b>Employee engagement</b>	Employee morale	Outcome	Following a reorganization in government structure, employee morale may be low. It is important to measure employee morale because employee morale determines if an employee will be engaged. Supported by literature review.	Long-term	Survey
<b>Employee engagement</b>	Level of employee engagement	Outcome	Demonstrates municipality's ability to motivate employees. Supported by literature review.	Long-term	Survey
<b>Employee engagement</b>	Absenteeism rate	Outcome	Absenteeism rate is an indirect way of measuring employee engagement; employees that are disengaged will have a higher absenteeism rate. Supported by literature review.	Long-term	Internal
<b>Employee engagement</b>	First year voluntary termination rates	Outcome	Is an indicator of the effectiveness of the municipality's onboarding process. Supported by literature review.	Short-term	Internal

<b>Employee engagement</b>	Employee reasons for resigning (exit survey)	Outcome	Indicates areas of improvement for the municipality in terms of the growth and development opportunities it offers, as well as the administrative staff culture. Supported by literature review.	Long-term	Internal
<b>Learning and Development</b>	Percentage of employees who receive a yearly (or bi-yearly) employee evaluation	Output	Demonstrates municipality's ability to foster a culture of personal development and growth within the municipality, which could lead to innovation, increased initiative and engagement of employees.	Short-term	Internal
<b>Learning and Development</b>	Number of training and development courses or workshops offered to employees	Output	Demonstrates municipality's ability to foster a culture of personal development and growth within the municipality, which could lead to innovation, increased initiative and engagement of employees and help with succession planning.	Short-term	Internal
<b>Learning and Development</b>	Percentage of employees that completed one or more training and development courses or workshops offered	Outcome	Indicates employees' interest in the training and development courses offered.	Long-term	Internal
<b>Socio-Cultural Identity, Demographics and Concerns of Citizens (NUMBER OF INDICATORS: 15)</b>					
<b>Socio-Cultural Identity</b>	Percentage of people feeling a sense of community belonging	Outcome	One of the goals of the Windsor/West Hants consolidation is to bring the region together and become stronger. This requires citizens to feel a sense of belonging to the community. Losing the	Long-term	Survey

<b>Socio-Cultural Identity</b>	Resident satisfaction with appearance of municipality	Outcome	sense of community is also a common concern of citizens when consolidation occurs, so it is important to measure. Citizen satisfaction with appearance of municipality could insinuate that citizens are satisfied with municipal service provision. It could also lead to another outcome: citizen sense of belonging to community.	Long-term	Survey
<b>Socio-Cultural Identity</b>	Youth satisfaction of municipality as a place to live	Outcome	If the youth are satisfied with the municipality as a place to live, they may choose to settle in the municipality to raise their own family later in life. This could lead to a growth in population over time. Population growth is part of the vision and goals of the consolidated municipality.	Long-term	Survey
<b>Socio-Cultural Identity</b>	Resident satisfaction with municipality as a place to live	Outcome	If residents are satisfied with the municipality as a place to live, they will likely not leave, which will lead to a growth in population over time. Population growth is part of the vision and goals of the consolidated municipality.	Long-term	Survey
<b>Socio-Cultural Identity</b>	Voter Turnout as a percentage of total population of voting age	Outcome	Higher voter turnout rates symbolize that citizens are engaged and interested in the political process.	Short-term	Internal / Census
<b>Socio-cultural identity</b>	Percentage of population that believe that most or many	Outcome	Trust is an important element that demonstrates the strength of a community, and developing a strong community is one of the goals of the Windsor/West Hants consolidation. Strong feelings of trust	Long-term	Survey

	people can be trusted		contribute to community relationships which affects well-being and a person's sense of belonging to a community.		
<b>Safety</b>	Percentage of people who feel safe walking home at night in their community	Outcome	High levels of perceived safety contribute to overall quality of life and bring people together, fostering a sense of community.	Long-term	Survey
<b>Safety</b>	Crime rate	Outcome	Research demonstrates that a high crime rate will reduce community quality of life. It would decrease trust amongst citizens leading to a decreased sense of community. One of the Windsor/West Hants goals is to grow the strength of the community and crime would hinder that.	Long-term	RCMP
<b>Demography</b>	Education attainment of citizens above the age of 25	Outcome	One of the goals of the Windsor/West Hants consolidation is to grow education, therefore tracking the educational attainment of citizens could demonstrate whether this goal is being achieved. Supported by literature review and jurisdictional scan.	Long-term	Census
<b>Demography</b>	Median age of residents	Outcome	One of the goals of the Windsor/West Hants consolidation is to grow employment and industry. Employment and industry growth bring in a diverse workforce, which could decrease the median age of the municipality. Supported by literature review and jurisdictional scan.	Long-term	Census
<b>Demography</b>	Percentage of residents	Outcome	Reveals what percentage of the region's population is struggling financially, which goes against the vision of growth and	Long-term	Internal

	accessing the local food bank		prosperity of the Windsor/West Hants Consolidated Municipality. Supported by literature review and jurisdictional scan.		
<b>Demography</b>	Percentage of population below poverty line	Outcome	Reveals what percentage of the region's population may be struggling financially, which goes against the vision of growth and prosperity of the Windsor/West Hants Consolidated Municipality. Supported by literature review and jurisdictional scan.	Long-term	Census
<b>Demography</b>	Total population size	Outcome	One of the goals of the Windsor/West Hants consolidation is to grow the region and understanding how the total population changes year over year could demonstrate whether this growth is being achieved. Supported by literature review and jurisdictional scan.	Long-term	Census
<b>Demography</b>	Total number of households	Outcome	One of the goals of the Windsor/West Hants consolidation is to grow the region and understanding how the total number of households changes year over year could demonstrate whether this growth is being achieved. Supported by literature review and jurisdictional scan.	Long-term	Census
<b>Demography</b>	Median household income	Outcome	Demonstrates the changes in the level of income and employment levels of the population, which can measure if the vision of growth and prosperity of the Windsor/West Hants Consolidated Municipality is being achieved. Supported by literature review and jurisdictional scan.	Long-term	Census

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## MEMORANDUM

**TO:** The Windsor West Hants Coordinating Committee

**FROM:** Jacob Che

**DATE:** March 7, 2020

**RE:** Benchmarking Workshop – Dalhousie University – March 5, 2020

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In 2019, the Coordinating Committee asked Masters Students from Dalhousie's "Management Without Borders" program to develop a number of performance metrics to measure the short and long-term success of the consolidation. The students produced a comprehensive report in December that was well-received by the Co-ordinating Committee. The Committee expressed interest in focusing on a smaller number of performance metrics that could be used as a tool by the new region (and other municipal units) to gauge success going forward.

On March 5<sup>th</sup>, a number of Nova Scotia municipal thought leaders participated in a workshop at Dalhousie with the goal of producing a short, practical list of performance metrics. A copy of the workshop invitation is attached (Appendix 1). A list of the attendees is also attached (Appendix 2). The workshop was facilitated by Jol Hunter.

The workshop participants initially identified the "key stakeholders" of Windsor-West Hants. The objective was to identify who might be affected by the consolidation – so that those stakeholders were kept in mind in developing the key performance indicators. A list of the key stakeholders is attached as Appendix 3.

After identifying the key stakeholders, the workshop participants were split into two groups. Each group discussed the interests of the key stakeholders for each of the following broad categories identified in the MWB team report:

- Governance
- Economics, finances, and taxation
- Socio-cultural identity
- Provision of services and infrastructure
- Administrative staff and structure

The groups then generated their top key performance indicators (KPIs) to measure the success of Windsor-West Hants based on the key stakeholders and their interests.

The groups then came together and discussed their findings as a single group. The large group took a closer look at KPIs to assess the practicality of using these KPIs to measure stakeholder interests. As the KPIs were evaluated, some were eliminated and some were modified.

The result of this exercise was a shortened list of top KPIs:

1. Financial Condition Index (FCI);
2. Income of citizens;
3. Unemployment rate;
4. Gross Domestic Product (GDP);
5. Transportation
6. Connectivity;
7. Citizen satisfaction of services;
8. Municipal employee engagement;
9. Affordable housing;
10. Population; and
11. Equity, inclusion, and diversity.

To conclude the workshop, the participants recognized that there was still some work to do to determine the best way to measure each of these KPIs. A number of participants offered to help define the best measures (quantitative and qualitative).

There was a great deal of enthusiasm around developing a framework that could serve as a practical tool (and be tracked by Windsor/West Hants going forward). The session involved some great idea exchanges, collaborative thinking - and a willingness to work together to finalize the KPI measures for the items identified above.

You Are Invited to Attend

## WWH Benchmarking Workshop

The Town of Windsor and the Municipality of the District of West Hants are joining forces April 1, 2020 to become stronger together.

Citizens, municipal players and business leaders are watching the new region take shape. Those watching the consolidation are undoubtedly wondering about the future success of the new region. How will we measure that success? What are today's key performance indicators for a thriving Nova Scotia municipality?

In 2019 the Coordinating Committee enlisted the help of a team of Dalhousie University Faculty of Management Masters students to develop a set of performance metrics to measure the short and long-term success of the consolidation. The team presented its report and recommendations to the Committee in December 2020.

We would like to share the Team's report and solicit your input to produce a practical shortlist of performance metrics that is accessible to citizens and can serve as a guidepost to other municipalities committed to accountability and transparency.

**Come join a small group of municipal thought leaders and help the Coordinating Committee take the next step in building a stronger region for the citizens of Windsor and West Hants.**

**Thursday, March 5, 2020**

12:30 pm – 1:00 pm Welcome and light lunch

1:00 pm – 5:00 pm Facilitated workshop

Room 2-22 | Steele Ocean Science Building  
1355 Oxford Street | Halifax



RSVP to Donna Jones at [djones@westhants.ca](mailto:djones@westhants.ca)

**APPENDIX 2**  
**Workshop Attendance**

Name	Position
Anna Allen	Outgoing Mayor of the Town of Windsor
Jenny Baechler	Senior Instructor, School of Public Administration at Dalhousie University
Jacob Che	Articled Clerk, Cox & Palmer
Lou Coutinho	Former Chief Administrative Officer of the Town of Windsor
Bruce Fisher	Manager, Financial Policy and Planning at the Halifax Regional Municipality
Matt Hebb	Assistant Vice President of Government Relations, Dalhousie University
Jol Hunter	Workshop Facilitator
Donna Jones	Project Administrator for the Region of Windsor and West Hants
Emily Lutz	Deputy Mayor of the County of Kings and VP at the Nova Scotia Federation of Municipalities
Chris McNeill	Chief Administrative Officer for the Region of Queens
Laurie Murley	Former Deputy Mayor of the Town of Windsor
Mark Phillips	Chief Administrative Officer for the Region of Windsor and West Hants
Emily Robinson	Rad Consulting
Patrick Rooney	Dalhousie University MBA Student and Management Without Borders Team Member
Kilian Schlemmer	Associate, Cox & Palmer
Kathy Cox-Brown	Municipal Sustainability / Province of Nova Scotia
Bongsun Cho-MacDonald	Municipal Sustainability / Province of Nova Scotia
Shalian	Dal Grad Student

## APPENDIX 3

### Key Stakeholders

In no particular order:

1. Other Government
2. Labour Force
3. Business owners and Entrepreneurs
4. Youth
5. Seniors
6. Marginalized or Underrepresented Communities
7. Communities
8. Families
9. Taxpayers
10. Elected Officials
11. Prospective Citizens



**The Region of Windsor and West Hants Municipality**  
**Consolidation Budget**  
**As of March 31, 2020**

Description	Approved Budget	Expensed to Date	Amount this Claim	Balance	Explanation/Notes
RFP's	\$ 538,615.00	\$ 357,293.79	\$ 179,267.79	\$ 2,053.42	
Salaries	\$ 476,000.00	\$ 399,852.90	\$ 121,842.43	\$ (45,695.33)	
Professional Services (Includes IT)	\$ 285,000.00	\$ 72,212.86	\$ 82,599.62	\$ 130,187.52	
Administration	\$ 200,385.00	\$ 71,755.45	\$ 119,544.96	\$ 9,084.59	
<b>Total</b>	<b>\$ 1,500,000.00</b>	<b>\$ 901,115.00</b>	<b>\$ 503,254.81</b>	<b>\$ 95,630.19</b>	



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# Nova Scotia restructuring offers new model for consolidation



Kevin Latimer, QC, is a partner with Cox & Palmer, a leading Atlantic Canadian law firm. He draws on 30 years of experience advising government and business on governance, land development, and regulatory issues. Kevin was appointed Coordinator for the Windsor-West Hants municipal consolidation project by the Province of Nova Scotia in December 2018. He can be reached at [klatimer@coxandpalmer.com](mailto:klatimer@coxandpalmer.com).

Nova Scotia's first municipal consolidation in more than 20 years is gaining attention as, potentially, a new model for consolidating two already stable and viable municipalities that are convinced they can achieve even more by coming together.

The Municipality of the District of West Hants and the Town of Windsor, vibrant municipalities within an hour of Halifax, are now well advanced in the process of bringing the municipalities together. This process began in July 2018 when the municipalities asked the province to pass the necessary legislation. Three months later, the legislation was passed and two months after that, in December, I was selected through a procurement process as project coordinator. The new municipality will be launched on April 1, 2020.

The project coordinator's job is to manage the consolidation in conjunction with a coordinating committee that includes Windsor Mayor Anna Allen, Deputy Mayor Laurie Murley, West Hants Warden Abraham Zebian, and Deputy Warden Paul Morton. Professional support is coming from the two chief administrative officers (CAOs) of Windsor and West Hants, Louis Coutinho and Martin Laycock, and their staffs. The province has provided \$1.5 million to support the consolidation work.

## Making the Case for Amalgamation

Nova Scotia municipalities have been well studied. Over the last 50 years, many thoughtful studies have consistently recommended streamlining Nova Scotia's 50-plus municipal units. The recommendations have generally been ignored, but the need for

top-drawer municipal governance has not diminished. Meanwhile, the challenges for both urban and non-urban municipalities have arguably grown.

While the case for consolidation is often clear to the consultants and the academics, the fear of change has deterred many. The loss of local heritage, of local identity, and the possible fracturing of the highly personal relationships that now exist between taxpayers and their municipal representatives have caused many to shy away from transformative change. That has led, in many cases, to crises as municipalities have lost their viability and dissolution became the only option.

Windsor and West Hants, two viable municipalities with relatively stable populations (3,700 and 15,000, respectively), weren't going to let that happen to them. Municipal leaders in those communities recognized that change of some sort was desirable and they were determined to create their own future to the best of their abilities.

West Hants Warden Zebian says the decision to consolidate "while both municipal units are at their peaks of strength was the single best and most important decision ever made in the history of these two municipal units." He's convinced that, because of the consolidation, "we will eliminate the competitive nature that has plagued our community in the past while focusing on our strengths as a single, unified municipality ... We will continue an upwards growth trajectory, both economically and population wise."

Windsor Mayor Allen says the consolidation project is the most important and rewarding project

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she's been involved with. "Change is not just the responsibility of the federal and provincial governments; it is also our responsibility, starting at the grass roots," she says. "It's up to us to deliver the best municipal services possible to our residents. I am very excited about the future here. The possibilities are endless."

Mayor Allen and Warden Zebian, along with their councils and CAOs, deserve enormous credit for their leadership. They did their due diligence and concluded that the municipal structures established long ago were no longer compatible with the region achieving its best future.

### Trusting in the Consolidation Process

As the Coordinating Committee embarked on the consolidation journey, it was recognized that, in and of itself, the process had to be right. The process needed to have the community's understanding and trust. For the new regional municipality to be launched successfully in 2020, the community would need to believe that the key merger issues had been addressed thoughtfully and transparently and that, where necessary, reasonable compromises had been achieved.

The Coordinating Committee agreed that it would meet the first and third Monday of every month – alternating the meeting location between the respective municipal council chambers – and that all meetings would be open to the public. Terms of Reference were adopted to provide transparency around committee decision making and process. It was also agreed that studies commissioned by the Coordinating Committee would be made public.

Working together, and with strong support from the Nova Scotia Department of Municipal Affairs, a project work plan was developed in March with scheduling milestones and the necessary related studies. The work plan remains a regular agenda item for each meeting to allow the committee to monitor progress.

### Progress Continues to Build

As of late May, good progress was being made.

A contract was awarded in December for the review of issues surrounding council size and polling districts. By mid-April, we had the consultant's report and recommendations that now form the basis for our application to the Nova Scotia Utility and Review Board, which will make the final determination on council size and polling districts. The consultant's work was guided by input gathered from an online and hard copy survey and meetings throughout the two municipalities. Direct survey responses were received from about 800 residents.

Another consultant was retained to help the Coordinating Committee better understand, for example, how best to combine the two existing administrative structures and work forces. The committee hired a communications firm to develop a public engagement and information strategy. Following a national search for a CAO, Mark Phillips (current CAO for the Town of Kentville, Nova Scotia, and a 20-plus year member of the Canadian Association of Municipal Administrators) begins his new job on September 16. With further consulting support, an asset registry is being developed that will be essential to understanding the condition of critical infrastructure and associated maintenance and replacement costs.

**NOVA SCOTIA, cont'd on p. 44**

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## NOVA SCOTIA, cont'd from p. 22

Other municipal players are watching our work. Patrick Tighe, Deputy Mayor of Sturgeon County, Alberta, is among those who have arranged for a direct briefing. He says he believes that the process, and the results, are of national interest.

The Nova Scotia Federation of Municipalities (NSFM) is also paying attention. At an NSFM workshop in May, after hearing a discussion with the Coordinating Committee, Councillor Lee Nauss, who has served for 52 years on the council of the Municipality of the District of Lunenburg, said if he has one regret after a half-century of municipal service, it is that he did not push harder for some sort of consolidation of neighbouring municipalities on the south shore of Nova Scotia.

### As Progress Continues, Conclusions Are Reached

Much work remains in Windsor and West Hants.

Even as conclusions on the key issues are reached, we recognize more residents of these municipalities will be drawn into the discussions. They will have their own learning curves as they increasingly become engaged; they will want information and they will want reassurance. And we need to listen.

That's the way it should be when you're breaking new ground, following a new path. We will not have done a good job unless those who live in what will be the new regional municipality recognize that we have acted in their best interests.

In the months ahead, we will continue to work diligently while reminding ourselves that the future best interests of those who live in these municipalities must be paramount in the decisions being made.

There's an element of growth and renewal about it. A sense of building something new together in, and for, the region itself. That concept is integral to the process and thinking. In this model, local autonomy and decision making carry the day and shape the future. Ultimately, everyone involved believes that local control will make all the difference as this exciting experiment in community building crosses the finish line in April 2020. **MW**

## OPEN LETTER, cont'd from p. 32

### Hidden costs and biases

It may also be worthwhile to look at hidden costs. For example, a budget that is paid out to a U.S. vendor today instantly loses 25 percent of its value. As noted above, the cost of preparing the winning bid will also be a hidden cost and deducted from your budget before any actual work gets started.

You might also like to consider how to avoid the distance bias. Qualified bidders from far away will have less to spend on your project when the costs of travel and accommodations are included in the fee, leaving less for the actual work. Be aware of this reality and try to find a way to eliminate this bias.

You could also look at the bias related to the size of firm. Don't make the submission process so onerous that only very large firms can respond (unless it's a job only very large firms can do). Small firms tend to have lower overheads and can deliver more service per dollar.

### Final thoughts

In achieving the best results for all concerned, it might also be worth thinking about what happens when your RFP hits the street. For example, bidders in my field are sometimes partners rather than competitors and we often check in with one another before deciding to bid. ("Did you see this RFP? What do you think of it? Are you going to bid? Would it be appropriate for us to form a team? etc.")

This is not collusion; it's often about avoiding losing money on what might be a no-hope submission. In regard to best value, you should also be aware of those qualified bidders who did not bid and find out why.

There are many other small niggling details about the bidding process. But, let's not lose sight of the fact that we who bid are professionals who want to do the best we can for your municipality and its residents. So please, make the path to our involvement as clear, straightforward, and efficient as possible. It's good customer relations and public money well spent. **MW**

15



**Municipal Affairs and Housing  
Office of the Minister**

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May 8, 2020

Transition Committee Members and Support Staff  
Region of Windsor and West Hants Municipality  
VIA EMAIL

Dear Transition Committee Members and Support Staff:

With April 1, 2020, behind us, and as we complete the transition from the Town of Windsor and the Municipality of the District of West Hants into the Region of Windsor and West Hants Municipality, I would like to take this opportunity to thank all of you for your hard work and dedication to this endeavour. The amount of time and effort that goes into consolidating two municipalities is extraordinary, and I commend you for the enthusiasm and perseverance that you have demonstrated throughout the consolidation process.

It is not every day that two municipalities voluntarily agree to consolidate into a new municipal unit. In fact, it has happened only once in the history of this Province: the formation of the Region of Queens Municipality in 1996. The magnitude of your accomplishment in this regard cannot be overstated. Your efforts will have a lasting positive impact on, not only the residents of the new Regional Municipality, but on the Province of Nova Scotia as a whole.

The work that you have done in the past 14+ months is remarkable, and I am sure that you will look back on this work proudly when you have the opportunity to reflect on your accomplishments. Rest assured that we will continue to use your work as a shining example of what can be achieved when one truly believes in the importance of working together for the benefit of all.

Thank you, again, for all that you have done for the Region and the Province.

Sincerely,

A handwritten signature in blue ink that reads 'Chuck Porter'.

Chuck Porter  
Minister

16

**DECISION**

**2019 NSUARB 112  
M09052**

**NOVA SCOTIA UTILITY AND REVIEW BOARD**

**IN THE MATTER OF the REGION OF WINDSOR AND WEST HANTS MUNICIPALITY  
ACT**

- and -

**IN THE MATTER OF AN APPLICATION** to determine the number of councillors and the boundaries of the polling districts for the new Regional Municipality

**BEFORE:** Roland A. Deveau, Q.C., Vice Chair  
Roberta J. Clarke, Q.C., Member  
Stephen T. McGrath, LL.B., Member

**APPLICANT:** **CO-ORDINATOR FOR REGION OF WINDSOR AND  
WEST HANTS MUNICIPALITY**  
Kevin Latimer, Q.C.

**FORMAL  
INTERVENOR:** **THINK HANTSPORT INNOVATIVE DEVELOPMENT  
ASSOCIATION**  
Toni Heatley, Jane Davis and Sally Zamora

**HEARING DATE:** June 24 and 25, 2019

**DECISION DATE:** August 19, 2019

**DECISION:** Application approved for 11 polling districts, each electing one councillor.

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## I INTRODUCTION

[1] In October 2018, the Legislature passed the *Region of Windsor and West Hants Municipality Act* which will amalgamate the Municipality of West Hants and the Town of Windsor into a Regional Municipality called the Region of Windsor and West Hants Municipality, effective on April 1, 2020. Under the *Act*, Cabinet appointed Kevin Latimer, Q.C., as the Co-ordinator of the Regional Municipality. The *Act* also provides for the establishment of a Co-ordinating Committee consisting of the Mayor and Deputy Mayor of Windsor, the Warden and Deputy Warden of West Hants, and the Co-ordinator.

[2] Section 10(1) of the *Act* provides that the Co-ordinator must apply to the Nova Scotia Utility and Review Board to determine the number of councillors and the boundaries of the polling districts. The Co-ordinator and Co-ordinating Committee retained Stantec Consulting Ltd. to conduct a process to assist the Committee in determining an appropriate governance structure for the new Regional Municipality. The Committee also engaged Dr. Jamie Baxter to conduct a study about the formation of regional governance in Nova Scotia.

[3] Stantec Consulting's process included public consultations and analysis about the number of councillors and polling districts, as well as the boundaries of polling districts. Stantec recommended that Council of the Regional Municipality be comprised of a Mayor, elected at large, and 11 councillors elected from 11 polling districts, as proposed in its Report.

[4] The Co-ordinating Committee accepted Stantec's recommendations, and the Co-ordinator filed an application with the Board, to establish the council size and the polling district boundaries in accordance with Stantec's Report. The Board held a public

hearing in West Hants Municipal Council Chambers at Windsor, Nova Scotia. The Board heard evidence from the Co-ordinator and from the Think Hantsport Innovative Development Association (THIDA), which was granted formal standing as an Intervenor in the matter.

[5] Following its review of the evidence and submissions, the Board sets the number of councillors and polling districts at 11 and establishes the boundaries of the polling districts as set out in the Stantec Report.

## **II BACKGROUND**

[6] The new Regional Municipality will be the fourth created in Nova Scotia (the others being Halifax Regional Municipality, Cape Breton Regional Municipality and Region of Queens Municipality), and the first in 25 years. In his opening statement, Mr. Latimer, the Co-ordinator, emphasized that while some regional municipalities were created through legislative edict in the past, the Region of Windsor and West Hants Municipality is different. He described how the existing municipalities, through their elected leaders, and sparked very much by the citizens themselves, reflected on their changing circumstances and concluded that they wanted to build something different – something that would advance the best interests of both municipalities by working together.

[7] The Board is aware that there have been citizens in these communities who have been working towards a new municipality for some time. In 2016, the Board received an application from citizens in both Windsor and West Hants to amalgamate the municipalities (Matter M07325). The application was brought under s. 358(c) of the

*Municipal Government Act*, S.N.S. 1998, c. 18 (*MGA*) and was supported by petitions gathered by the Avon Region Citizens Coalition, which were signed by more than 2,000 electors in West Hants and more than 500 electors in Windsor. A resolution of the Windsor Town Council also supported the application.

[8] In February 2017, the application was adjourned when West Hants and Windsor entered into a Memorandum of Understanding. Although the municipalities had different views about amalgamating Windsor and West Hants, the MOU reflected their desire to work collaboratively to strengthen their greater community. The Board granted a further adjournment in the spring of 2018 following the initiation of a municipal modernization project, in association with the Province, "to develop a new model for regional governance and improved municipal cooperation and collaboration." Windsor and West Hants were to pilot this initiative. Ultimately, the application was withdrawn in October 2018 when the Province passed the *Act*.

[9] The present application is to set the number of councillors and the boundaries of the polling districts in the new Regional Municipality. In past decisions dealing with such matters, the Board has noted that the style of the council desired by citizens influences the determination of council size. This involves questions about how much accessibility to their councillors citizens want, and a choice between what the Board has described as a board of management style or a board of directors style of governance. The number of councillors also affects the effectiveness and efficiency of a council, and the extent to which it is able to address matters from many viewpoints and perspectives. The definition of boundaries within a municipality, while balancing the

voting power of each elector, tends to highlight commonalities and differences within individual communities within a municipal unit.

[10] Establishing the number of councillors and boundaries can sometimes be divisive, but the Co-ordinator, in his remarks to the Board, emphasized the collaborative nature of the process leading to the application now before the Board. He discussed the consultation efforts undertaken throughout West Hants and Windsor in which citizens were invited to "Have your say!". The Co-ordinator also emphasized that the Co-ordinating Committee was designed by the Legislature to be representative of the municipalities involved and noted that the Co-ordinator only had a vote in decisions of the Co-ordinating Committee if there was a tie. In this way, he said, the municipalities were encouraged to find ways to communicate and work together, and to find solutions that were in the best interests of both – or someone else would cast a vote to make the decision. The Co-ordinator advised the Board that he never had to cast that vote, as individual members of the Committee found a way to set aside any individual or parochial interests or agendas, and made unanimous decisions that found ways to move forward while keeping the bigger picture in mind.

[11] It is in this spirit of cooperation and leadership that the present application was unanimously supported by all members of the Co-ordinating Committee.

### **III PROCEEDINGS**

[12] In the application, the Co-ordinator outlined the process leading to the application:

- (a) The Act requires the Co-ordinator to make application to the Board to determine the number of councillors and the boundaries of the polling districts for the new Regional Municipality;

- (b) At the request of the Co-ordinating Committee, Stantec Consulting Ltd. ("Stantec") conducted a governance review process to assist the Committee in determining an appropriate governance structure for the new Regional Municipality. Stantec's review included consultations and analysis with respect to:
  - i. Phase 1 - number of councillors; and
  - ii. Phase 2 - boundaries and polling districts.
- (c) The Co-ordinating Committee also commissioned a study by Dr. Jamie Baxter with respect to the formation of regional governance in Nova Scotia. The purpose of the report was to provide background context and analysis with respect to institutional design of the new regional government.
- (d) Based on its review, Stantec ultimately recommended the Council of the Regional Municipality of Windsor and West Hants should consist of a Mayor, elected at large and 11 Councillors elected from districts generally bounded as illustrated in Stantec's final report;
- (e) Following consideration of Dr. Baxter's study and Stantec's report the Co-ordinating Committee unanimously passed a motion on April 15, 2019 adopting Stantec's recommendation that the council of the new Regional Municipality should consist of a Mayor, elected at large and 11 Councillors elected from districts generally configured as proposed in Stantec's final report.

[Stantec Report, Exhibit W-1, pp. 4-5]

[13] The Board scheduled the public hearing on June 24 and 25, 2019, to be held in the West Hants Municipal Council Chambers at Windsor, Nova Scotia. The Notice of Hearing was published in the Chronicle Herald on May 11 and 15, 2019, and in the Valley Journal Advertiser on May 14 and 21, 2019.

[14] On May 23, 2019, THIDA filed a letter with the Board requesting formal standing as an Intervenor. It opposed the Co-ordinator's application with respect to the proposed boundaries in the area of the community of Hantsport. THIDA was concerned that the proposed polling district boundaries would not reflect Hantsport's community of interest and would threaten the community's effective representation on Council. In a letter dated May 28, 2019, the Board granted THIDA formal standing at the hearing.

[15] Mr. Latimer, the Co-ordinator, appeared on his own behalf at the public hearing, while Toni Heatley and Jane Davis acted as agents for THIDA. A scheduled

evening session was cancelled when no one registered to speak. The Board received eight letters of comment.

#### IV STATUTORY PROVISIONS

[16] The *Region of Windsor and West Hants Municipality Act*, S.N.S. 2018, c. 26, was enacted in October 2018. The statute amalgamates the Municipality and the Town into a Regional Municipality called the Region of Windsor and West Hants Municipality, until a new name is later chosen under s. 11. The new Regional Municipality is to come into effect on April 1, 2020.

[17] The *Act* provides for the appointment of a Co-ordinator and the establishment of a Co-ordinating Committee to deal with the transition to the Regional Municipality:

**Co-ordinator**

4 (1) The Governor in Council shall appoint a person to be the Co-ordinator of the Regional Municipality for such term as the Governor in Council determines.

(2) The Co-ordinator has all the powers of a commissioner appointed pursuant to the *Public Inquiries Act*.

**Co-ordinating Committee**

5 (1) A Co-ordinating Committee is established consisting of the Mayor and Deputy Mayor of Windsor, the Warden and Deputy Warden of West Hants, and the Co-ordinator.

[18] Cabinet appointed Mr. Latimer as the Co-ordinator of the Regional Municipality.

[19] The ordinary polling day for the first election of the Mayor and councillors is set under the *Act* as Saturday, March 7, 2020, with nominations to be filed with the returning officer by February 12, 2020. To that end, the Co-ordinator must apply to the Board to determine the number of councillors and the polling district boundaries:

**Council**

**10 (1)** The Co-ordinator shall apply to the Nova Scotia Utility and Review Board for a determination of, and the Board shall determine, the number of councillors and the boundaries of the polling districts in the Regional Municipality.

[20] The Board has powers under the *Municipal Government Act* to determine the number of councillors and to set the boundaries of polling districts:

**Powers of Board**

- 368 (1)** Upon application, the Board may, by order
- (a) divide or redivide a municipality into polling districts;
  - (b) amend the boundaries of any polling district;
  - (c) dissolve polling districts;
  - (d) determine that a town be divided into polling districts or cease to be divided into polling districts;
  - (e) determine the number of councillors for a municipality; and
  - (f) determine the date upon which the order takes effect.
- (2)** An application may be made by
- (a) the Minister;
  - (b) a municipality; or
  - (c) at least fifty electors of a municipality.
- (3)** The Board may make an order granting the whole or part of an application, and may grant such further or other relief as the Board considers proper.
- (4)** In determining the number and boundaries of polling districts the Board shall consider number of electors, relative parity of voting power, population density, community of interest and geographic size.
- (5)** In determining the number of councillors for a town, the Board shall consider the population and geographic size of the town.

**Study of polling districts required**

**369 (1)** In the year 1999, and in the years 2006 and every eighth year thereafter the council shall conduct a study of the number and boundaries of polling districts in the municipality, their fairness and reasonableness and the number of councillors.

**(2)** After the study is completed, and before the end of the year in which the study was conducted, the council shall apply to the Board to confirm or to alter the number and boundaries of polling districts and the number of councillors. [Emphasis added]

## **V EVIDENCE**

### **(i) Evidence of the Co-ordinator**

[21] The Co-ordinator called four witnesses, namely Louis Coutinho, CAO for the Town of Windsor; Martin Laycock, CAO for the Municipality of the District of West Hants; John Heseltine; and Dr. Baxter. John Heseltine is a consultant with Stantec. He was qualified as an expert witness, able to provide opinion evidence respecting municipal boundary reviews. Dr. Baxter was also qualified as an expert in the field of institutional design.

[22] There are at present 10 councillors (and 10 corresponding polling districts) in the Municipality, one of whom is elected as the Warden by his or her peers. There are at present four councillors elected at large in the Town, plus the Mayor. According to the most recent 2016 Census, the population of the Town is 3,648. The population of the Municipality is 15,368.

[23] The application requests that the number of councillors for the new Regional Municipality be set at 11 councillors, elected from 11 polling districts, as proposed in the Stantec Report. The following table (which was compiled by the Board based on the application) shows the estimated number of electors in each proposed polling district, based on the number of eligible electors in the last municipal election which was held on October 15, 2016:

Polling District	Area Km <sup>2</sup>	Number of Electors	Variation from Avg. Number of Electors	
			#	%
1 Walton-Centre Burlington	215.38	1,216	(174)	(12.5%)
2 Cogmagun - Avondale	202.00	1,252	(138)	(9.9%)
3 Newport Corner - Sweets Corner	65.7	1,382	(8)	(0.6%)
4 St. Croix - Ellershouse	251.63	1,325	(65)	(4.7%)
5 Wentworth Creek - Three Mile Plains	58.81	1,409	19	1.4%
6 Panuke Lake - Garlands Crossing	126.54	1,489	99	7.1%
7 Vaughan - Upper Falmouth	353.63	1,500	110	7.9%
8 Hantsport - Mount Denson	38.36	1,524	134	9.6%
9 Falmouth	12.97	1,324	(66)	(4.8%)
10 North Windsor	5.50	1,358	(32)	(2.3%)
11 South Windsor	5.25	1,511	121	8.7%

Total number of electors: 15,290  
 Number of councillors: 11 (plus Mayor)  
 Average number of electors per councillor: 1,390

[24] Two Stantec Reports, the initial report on Council Size dated February 21, 2019, and the final Report on Council Size and Polling District Boundaries dated April 10, 2019, were filed in this proceeding. Unless otherwise indicated, all references to the Stantec Report in this Decision relate to the latter final Report.

[25] Mr. Heseltine outlined the consultation process followed in the conduct of Stantec's study and the preparation of its Report. Stantec followed a two-step process to conduct its study. Adopting a methodology recommended by the Board in its prior decisions, the first step was to determine the appropriate number of councillors to serve the Regional Municipality, followed by the second phase of the process of determining appropriate polling district boundaries.

[26] Both phases of Stantec's study consisted of a series of public meetings and a survey. Stantec also conducted interviews with current Council members from the Town and Municipality. Notices for the public meetings were published on a website maintained by the Co-ordinating Committee and on the websites maintained by the Town

and Municipality. For each phase of the study, a total of five notices were also placed in publications circulating in the municipalities: the Advertiser Journal and the Valley Harvester. The public meetings were also listed at the end of the online survey questionnaires.

[27] The surveys were published online and made available on paper as well, although the paper versions of the survey for the first phase of the study were not produced until concerns were raised that not all residents were able to access the online surveys. Paper copies of these surveys were made available at the public meetings, the Windsor Town Hall and the West Hants Municipal Building. In some cases, they were delivered door to door.

[28] For Phase 1 of the study, Stantec held five public meetings in different locations and on different dates as follows:

<b>Location</b>	<b>Dates</b>
Avondale Community Hall	Tuesday, January 29, 2019
Brooklyn Civic Centre	Wednesday, January 30, 2019
Southwest Hants Fire Hall, Vaughn	Thursday, January 31, 2019
Windsor Community Centre	Tuesday, February 5, 2019
Falmouth Community Hall	Thursday, February 7, 2019

Stantec estimates that 86 residents attended these meetings although some participated in more than one session.

[29] For the benefit of those who attended these public sessions, Stantec prepared posters with information about governance and the council size review. Attendees were encouraged to read these posters and Mr. Heseltine was available to assist with questions. He also made a formal presentation at each meeting and provided the audience with an opportunity to ask questions or make comments. Stantec included a summary of concerns raised during these meetings in the Stantec Report. Stantec also

noted that it received one written submission during the Phase 1 public meetings from the Avon Region Citizens Coalition.

[30] The Phase 1 survey was posted on January 17, 2019 and remained open for responses until February 13, 2019. Stantec received 748 survey responses (most of which were online responses). The Stantec Report noted:

Notwithstanding concerns with Internet access in rural areas expressed at public meetings, responses were also well-distributed. Of 51 named communities in West Hants, at least one online response was received from 50 based on responses to Question 5.

[Exhibit W-1, p. 106]

[31] Stantec analyzed the survey results and determined that most of the respondents preferred a council size (including a mayor) of between 10 and 12. A council size of 10 was preferred by the largest number of respondents (23.2%), but a council size of 12 was preferred by nearly as many (21.8%). A council size of 11 was preferred by 16.5% of respondents, and was the third most popular choice. Stantec observed that rural residents tended to prefer larger council sizes than residents who lived in more suburban and urban areas, but Stantec did not find the differences to be particularly pronounced.

[32] The Stantec Report noted that the survey that was conducted was not a poll and the method of distributing the survey could not obtain a representative sample.

However, the Stantec Report also notes:

Council sizes from ten through twelve were clearly favoured by respondents to our survey of residents. Even in the Town of Windsor, which had the largest constituency preferring a smaller council, nearly half of residents expressed preferences between ten and twelve, and the majority (54.3%) favour a council of ten or more. While there are very clear shortcomings with the representativeness of the survey, all significant sub-groups that we have examined favoured a council in the same range. In areas outside of Windsor the majority generally favoured a larger council.

[Exhibit W-1, p. 112]

[33] A council of 9 or 11 councillors, plus a mayor, would produce a council size of either 10 or 12, so Stantec therefore recommended that 9- and 11- district scenarios be assessed in Phase 2 of the Study. Stantec prepared scenario maps showing a configuration for 9 and 11 districts in the new Regional Municipality and used these in its Phase 2 public consultation.

[34] For Phase 2 of the study, Stantec held five public meetings in different locations and on different dates as follows:

<b>Location</b>	<b>Dates</b>
Three Mile Plains	Tuesday, March 5, 2019
Hantsport	Wednesday, March 6, 2019
Summerville	Thursday, March 7, 2019
Ardoise	Wednesday, March 13, 2019
Windsor	Thursday, March 14, 2019

The meetings were conducted in a fashion similar to Phase 1. Stantec estimates that 56 residents attended these meetings although some participated in more than one session.

[35] The Phase 2 survey was posted on February 28, 2019 and remained open for responses until March 21, 2019. These surveys incorporated maps of the 9- and 11- district scenarios. Additionally, the municipalities posted large format maps in 42 publicly accessible locations in the Town and Municipality to assist residents with their responses to the survey and their participation in the public meetings. Stantec received 883 responses to the Phase 2 survey. Stantec observed that there was a disproportionate number of responses to the survey from residents in some areas, which it attributed to the door to door delivery of the survey by the councillor for the current District #3.

[36] Stantec analysed the survey results and found that respondents most frequently preferred the 11- district scenario using the boundaries developed by Stantec (49.1%). A smaller number of respondents (35.2%) preferred the 9- district scenario. A

minority of respondents preferred an 11- district scenario or a 9- district scenario, but did not like the boundaries proposed by Stantec. A small number of residents who responded to the survey (6.2%) rejected both scenarios. Stantec observed that, if the results from areas where there were a disproportionate number of survey responses provided were excluded, there was "essentially a dead heat" between residents favoring 9 districts and residents favoring 11 districts.

[37] After the Phase 2 public meetings, Mr. Heseltine interviewed 13 of the 15 council representatives of the two municipalities and the chief administrative officers of both. These interviews were loosely structured around the questions in the Phase 2 survey and the municipal representatives who were interviewed were asked about their preference for a 9- or 11- district Regional Municipality and any suggestions they had about boundary improvements. Based on suggested boundary changes, Stantec made specific changes to realign some of the boundaries in its scenarios. The Stantec Report notes:

We are pleased with the results of these changes. In addition to responding to suggestions from council members and residents, the resulting boundaries are generally clearer and fewer communities are divided.

[Exhibit W-1, p. 127]

[38] The revised 9- district and 11- district scenarios were reviewed with members of both municipal councils on April 1, 2019.

[39] The final recommendation in the Stantec Report is:

Taking into account the foregoing considerations, we recommend the Council of the Regional Municipality of Windsor and West Hants should consist of a Mayor elected at large and eleven Councillors elected from districts generally bounded as illustrated in the April 10, 2019, Windsor West-Hants Governance Review Council Size and Polling District Boundaries Report.

[Exhibit W-1, p. 135]

**(ii) Evidence of THIDA**

[40] As noted earlier in this Decision, the Board granted formal standing to THIDA to participate as an Intervenor in this matter. THIDA is concerned that the proposed polling district boundaries do not reflect the appropriate community of interest for the community of Hantsport. Its concern was summarized in THIDA's request for formal standing. It alleged:

... that without effective representation, the prosperity of Hantsport is at risk. We believe that to have effective representation, Hantsport must retain its community of interest designation and current boundaries. As intervenors, we will present evidence to support this.

[Heatley email, May 24, 2019]

[41] THIDA is a not for profit society in Nova Scotia, established in 2014. Its mandate and purpose is "to incubate and develop Hantsport-centric ideas and projects and be an advocate for its prosperity". Membership is open to anyone who supports the mandate.

[42] As noted at the hearing, THIDA was involved in a prior proceeding before the Board respecting the dissolution of the Town of Hantsport. In its Decision dated June 10, 2015, the Board ordered the dissolution of the Town, 2015 NSUARB 154 (Matter M06209). The Town was dissolved into the Municipality of the District of West Hants, effective July 1, 2015.

[43] Jane Davis, the President of THIDA, testified in response to cross-examination by Mr. Latimer and questions by the Board. She said that THIDA is an incorporated society. Its membership was around 65 persons at the time of the application to dissolve the Town of Hantsport. Membership is currently about 24 persons. She described THIDA as "strong advocates for Hantsport".

[44] Ms. Davis acknowledged that four of the letters of comment to the Board came from supporters of THIDA or their spouses. She further acknowledged that the letter from a Hantsport resident who supported the Co-ordinator's recommendation represented a different point of view than THIDA's, although she said it did not illustrate a broad consensus.

[45] THIDA proposed that the Windsor/West Hants region should have 12 electoral districts, rather than 9 or 11, one of which would be Hantsport using its current boundaries. In response to questions from the Board, Ms. Davis suggested the 12 districts could be the 10 districts currently in West Hants (one of which is Hantsport alone) and two from the Town of Windsor.

[46] Ms. Davis said THIDA agreed with the Board's 2016 West Hants boundary review Decision which retained Hantsport as a separate district, although not permanently. Instead, she suggested that any change should only happen if there were a significant change, which had not yet occurred.

[47] THIDA's written evidence was intended to support its key arguments that:

- Hantsport was found, in the 2016 West Hants boundary review to be, and remains, a unique community of interest;
- The terms of reference for the Request for Proposals (RFP) for the boundary review were flawed due to: over-emphasis on voter parity; a failure to inform Hantsport residents that its status as a community of interest was in jeopardy; and, the minimal scope of advertising and consultation;
- The surveys conducted were inadequate in content and accessibility;
- The reports from Stantec were deficient and/or inaccurate regarding Hantsport, and;
- The Hantsport Area Advisory Committee representation has been ineffectual.

[48] THIDA provided evidence of the tax rate paid by residents of Hantsport, including an area rate for various services, separate from the general rate paid by other

residents of West Hants. It noted that, from 1895 to 2015, Hantsport had enjoyed status as an incorporated town, and has "urban" density, compared to other areas of West Hants, as well as the current Town of Windsor. It stated that 19% of the commercial assessment roll of West Hants is in Hantsport.

[49] THIDA also pointed out that a portion of the area rate for recreation supports many recreational facilities, including the Hantsport Memorial Community Centre. In addition, the community's sewer and water services are not shared by any other area of West Hants.

[50] THIDA described Hantsport as having a "defined 'downtown'" with roads owned and maintained by West Hants out of the area rate, as well as its own distinct municipal planning documents.

[51] Finally, THIDA provided a portion of a Statistics Canada map which showed that, geographically, Hantsport is naturally divided by the Avon and Halfway Rivers from the remainder of West Hants, and by the political boundary of Kings County on the west.

[52] Regarding the RFP, which it filed, THIDA stated that three options were to be provided, and that only a  $\pm 10\%$  variance in the targeted relative parity of voting power was referenced, rather than the exceptional variance of  $\pm 25\%$ . Further, the RFP stated that "communities of interest, including the former Town of Hantsport and the present Town of Windsor" were to be taken into consideration.

[53] Ms. Davis said that if Hantsport were one of 12 districts, she had roughly calculated the variance from the average number of electors per district to be -27% for the Hantsport district, which is very close to the existing -26% variance from the 2016 boundary review, and less than the -33% in the 11- district scenario and -46% in the 9-

district scenario. While she agreed on cross-examination that all voters should be treated equally, she said there are exceptions.

[54] THIDA's evidence included excerpts from the report of the 2019 Nova Scotia Electoral Boundaries Commission review which recommended eight provincial electoral districts which exceeded the  $\pm 25\%$  variance due to exceptional circumstances. One of these districts was Queens, based on "political boundaries", a feature which THIDA said applied to Hantsport.

[55] THIDA filed copies of advertising which did not indicate that Hantsport's status as a community of interest was to be discussed in the public consultation. THIDA also suggested that no local advertising was done in Hantsport. According to THIDA, some meetings were on very short notice, and online advertising was ineffective, due to lack of internet services in some areas of the Municipality.

[56] The Phase 1 survey conducted by Stantec did not allow residents of the former Town of Hantsport to indicate they had voted in municipal council elections prior to 2016. THIDA also asserted that the survey was deficient in not mentioning that Hantsport is currently an electoral district, and in not explaining that the mayor would be elected at large and not representing a district.

[57] Ms. Davis agreed that she was able to keep informed about the boundary review and attend and participate in consultation meetings. Ms. Davis suggested the low turnout at the Hantsport meeting was the result of a lack of understanding of the process, the ambiguity surrounding the position of mayor, and the lack of advertising the potential loss of Hantsport's status as a single district. She said that people did not know what was

at stake. However, Ms. Davis confirmed that THIDA has attempted to "get the word out" about the Hantsport meeting.

[58] THIDA had several concerns about the Stantec Report, suggesting it was biased against Hantsport as a community of interest, and gave undue weight to voter parity. Further, it said that Stantec was in error in stating that Hantsport was separated from other areas of West Hants by Highway 101, and that Hants Border is in West Hants. In addition, THIDA said that Bishopville and Hants Border, two areas which are included in the proposed District 8 which includes Hantsport, were not, as Stantec reported, exclusively accessed through Hantsport.

[59] Ms. Davis agreed that based on the number of voters, Hantsport would still have the most voters in its district under either the 9- or 11- district scenarios. She also agreed that leaving Hantsport as a district would give it greater voting power but she did not believe that voter parity should play the only role in deciding the number of districts and boundaries.

[60] In response to questions from the Board, Ms. Davis agreed that although she had said that the rural areas which would be part of the new district containing Hantsport had "nothing to do with Hantsport", the residents of those areas shop or work in Hantsport or use facilities there. Her point was that they do not share the area rates, services or planning documents.

[61] Ms. Davis acknowledged that some communities within the new region were being combined and others divided in the scenarios presented in the Stantec Report; however, she observed that the Town of Windsor, while divided into two districts, was maintaining its "town boundaries". Ms. Davis did not agree that Hantsport would

have a stronger voice under either scenario despite having the majority of electors in the district.

[62] Ms. Davis said the elected councillor would have divided loyalties and, therefore, Hantsport would not have effective representation. She stated that the councillor would ignore views. She preferred Hantsport to have a solely dedicated councillor. At the same time, it was acknowledged that the current councillor did not attend the Stantec information session held with the councillors from both municipal units, nor did he participate in the individual interviews done by Mr. Heseltine, although this could have been accommodated by phone.

[63] In Ms. Davis's view, the change to regional governance will not affect Hantsport as it is already part of a region; further she said that leaving Hantsport alone will not hinder the new Regional Municipality.

**(iii) Letters of comment**

[64] Eight letters of comment were filed in this matter; five of them related to concerns addressed by THIDA. Of those five letters, only one supported the recommended number of councillors and the district boundaries. The writer said it would be unfair for Hantsport with fewer people than other districts to make up one district. The other four letters relating to Hantsport supported the continuation of Hantsport as a single district, based mainly on the concept of community of interest.

[65] Of the other three letters, one writer expressed a wish to eliminate districts entirely and to be able to vote for 11 councillors at large (the Board notes this is not permitted under the *MGA*). The other two letters suggested that what one writer described as "the Town/County divide" would be perpetuated under the recommended

boundaries. The writers both suggested that Windsor should not merely be divided into two districts but should be re-configured to take in suburban areas abutting Windsor. This would eliminate the "divide" and promote integration of Windsor and the more rural areas. Both writers supported a 9- district model.

[66] The Board appreciates the interest in municipal governance which is apparent from the letters of comment. They contained comments which Mr. Latimer and the Board raised during the hearing with witnesses.

## **VI ANALYSIS AND FINDINGS**

### **(i) Board's Jurisdiction**

[67] Section 368(4) of the *MGA* sets out the criteria for the Board to consider as follows:

**368 (4)** In determining the number and boundaries of polling districts the Board shall consider number of electors, relative parity of voting power, population density, community of interest and geographic size.

[68] In 2004, the Board determined that the target variance for relative parity of voting power shall be  $\pm 10\%$  from the average number of electors per polling district: see *Re Halifax Regional Municipality*, [2004] NSUARB 11 (*HRM Decision*). Any variance in excess of  $\pm 10\%$  must be justified in writing. The larger the proposed variance, the greater the burden on the municipal unit to justify the higher variance from the average number of electors.

[69] While the Board will permit variances up to  $\pm 25\%$ , the outer limits of this range should only apply in exceptional cases, where the affected municipality provides detailed written reasons showing that population density, community of interest or geographic size clearly justify the necessity of an increased variance within a polling

district. In most cases, however, the Board expects municipalities to meet a target variance of the number of electors in each polling district which is within a  $\pm 10\%$  range of the average.

[70] The Co-ordinator's application requests approval for 11 polling districts, each electing one councillor. The application notes that, in addition, there will also be a Mayor.

[71] Currently, the Town of Windsor has a Mayor, while the Municipality of the District of West Hants has a Warden. In the mayoral model (including for the current Town of Windsor), the Mayor is elected at large by the electors and sits as an additional member of council. Under the warden model (including for the current Municipality) one of the newly elected councillors is elected by his or her fellow councillors (from amongst themselves), following a general municipal election.

[72] As noted earlier in this Decision, a new Regional Municipality is being established under the *Region of Windsor and West Hants Municipality Act*. After it becomes effective April 1, 2020, the new Regional Municipality will be governed under the relevant provisions of the new statute and the provisions of the *Municipal Government Act*, as they relate to regional municipalities. In both cases, the statutory provisions require, at least impliedly, that the council of a regional municipality be chaired by a mayor.

[73] It was confirmed at the hearing that the Board is not being asked to approve the mayoral model for the new Regional Municipality.

[74] For the purposes of the *MGA*, the position of mayor is not included in the number of councillors and, accordingly, does not fall within the scope of this review

conducted by the Board. The Board's review under s. 368 of the *MGA* is limited to the determination of the appropriate number of councillors and polling districts, as well as approving polling district boundaries.

**(ii) Public consultation**

[75] THIDA has submitted that there were various flaws in Stantec's public consultation process.

[76] Among other things, THIDA alleged that the terms of reference for the Request for Proposals (RFP) for the boundary review were flawed because they placed too much emphasis on voter parity and failed to inform residents of Hantsport that its status as a community of interest was in jeopardy. THIDA said that the advertising and the scope of the public consultation process were deficient in that no local advertising was done in Hantsport, that some meetings were held on very short notice, and the online advertising was ineffective due to the lack of internet services in some areas of the municipality.

[77] THIDA also had concerns with the content of the survey, stating (correctly) that the Phase 1 survey did not allow residents of the former Town of Hantsport to indicate they had voted in municipal council elections prior to 2016. It also asserted that the survey was deficient in not mentioning that Hantsport is currently an electoral district, and in failing to explain that the mayor would be elected at large and not be representing a district. On the latter point, THIDA said that the questions on the survey led to confusion over whether or not the various council size options included the mayor, who is to be elected at large.

[78] In its *HRM* Decision, the Board outlined the importance of public consultation in municipal boundary reviews and the two-phased process to be followed:

#### **VIII GUIDANCE FOR FUTURE APPLICATIONS**

[106] The Board feels that it would be useful to provide some guidance to HRM and other municipalities with respect to future applications pursuant to ss. 368 and 369 of the Act. ...

##### **A. Number of Councillors and Polling Districts**

[107] It is the Board's view that the logical starting point under the Act is for Council to determine the desired number of councillors. Questions related to the distribution of polling districts should be addressed in a second stage.

[108] Determining the size of Council involves the consideration of the desired style of Council, the governance structure of Council, and a determination of an effective and efficient number of councillors.

[109] The style of government is a question which should not be decided by Council until adequate public consultation has occurred respecting the expectation of constituents.

[110] However, the size of Council and its governance structure is a matter to be determined by Council in an informed debate after further consultation. On this issue it would be helpful to consult senior staff and perhaps experts in the field.

[111] Once the total number of councillors and polling districts is determined, the task becomes one of distributing the polling districts to satisfy the objectives listed in s. 368(4) of the Act.

##### **E. Public Consultation**

[115] Just as with determining the desired number of districts, public consultation is essential to a successful process of setting boundaries. Ideally, municipalities should do this in two phases: a first set of public consultations and hearings prior to setting tentative district boundaries, and then another round of public consultations once tentative boundaries have been determined. ...

[*HRM* Decision, paras. 106-111, and para. 115]

[79] The Board does not dictate how municipal bodies are to conduct their public consultation on such matters. It recognizes that each municipality is different in terms of its accepted practice and the expectations of its residents. In its Decision respecting the *Town of Canso*, 2007 NSUARB 68, the Board stated as follows with respect to public consultation on municipal boundary reviews:

[19] In the Board's opinion, public consultation is an inherent component of the study to be conducted by Council pursuant to s. 369 of the Act. In the view of the Board, the

danger of limiting or not actively canvassing the public's views on such issues is that members of the public may intervene in the Board hearing, and raise issues which may have been better addressed during the consultation process (which occurred in this instance). If the public's concerns are legitimate or persuasive, and no avenue has been afforded for those concerns to be considered by Council, it could lead to an application by Council being referred back for further deliberation, or varied by the Board.

[20] The nature and extent of the study to be conducted by Council is within its discretion, depending on the circumstances existing in each case. However, the consultation should be of a type and degree which allows members of the public an opportunity to express their views on the size of their council, on whether a town [municipality] should be divided into wards, and upon the location of boundaries for town wards or municipal polling districts, should that be applicable. The Board notes that most municipal units already incorporate some form of public consultation into their study. [Emphasis added]

[Canso Decision, paras. 19-20]

[80] In the present matter, the Board considers that the public consultation carried out by Stantec, on behalf of the Co-ordinating Committee, was extensive and appropriate. The Co-ordinating Committee engaged Stantec to conduct the public consultation, and also provided resources to Mr. Heseltine to assist him in booking the public meeting locations, arranging the advertising and distribution of meeting notices, and posting the online survey on the respective town and municipal websites, as well as on the Co-ordinating Committee's new website.

[81] First, the Co-ordinating Committee outsourced this important task to a neutral outside party. In conducting its own process, Stantec could take an objective view of the public input and make appropriate recommendations on council size and polling district boundaries.

[82] Second, consistent with the guidelines outlined by the Board as described above, Stantec carried out its study in the two-phased approach recommended by the Board: i.e., Phase 1 to determine the appropriate council size and Phase 2 to determine the polling district boundaries.

[83] Third, each phase of Stantec's study consisted of a series of five public meetings and an online survey. To address a deficiency discovered early in the process, Stantec and municipal staff also arranged for hard copies of the survey to be available to residents. The surveys were made available at the public meetings, the Windsor Town Hall and the West Hants Municipal Building. Some were also delivered door to door by local councillors.

[84] Fourth, notices for the public meetings were posted on the Co-ordinating Committee's new website and on the town and municipal websites. Moreover, notices were published in the Advertiser Journal and in the Valley Harvester. The details of the public meetings were also listed at the end of the survey questionnaires. Also, during Phase 2, notices relating to the 9- and 11- district scenarios were distributed in 42 public locations in communities throughout the region, inviting participation in the public meetings and on the survey.

[85] In the Board's view, the success of the circulation of the surveys and advertisement of the public meetings is demonstrated by the response to each of these components of the consultation. Stantec estimated that 86 residents attended the Phase 1 meetings and 56 residents attended the Phase 2 meetings, although some participated in more than one session in each phase. With respect to the survey, each questionnaire remained open for about three weeks, which the Board considers provided ample time for members of the public who wished to share their views. In Phase 1, Stantec received 748 survey responses (most of which were online responses). Stantec received 883 responses to the Phase 2 survey.

[86] Mr. Heseltine noted during the hearing that the number of responses to the survey, and attendance at the public meetings, was the best response he had seen in his prior municipal boundary engagements. This is also consistent with the Board's experience in its municipal boundary reviews.

[87] Further, Stantec's engagement with the public during the meetings was meaningful. Stantec prepared posters with information about governance and the council size review for those who attended the sessions. Attendees were encouraged to read these posters and Mr. Heseltine was available to assist with inquiries. This was followed by a formal presentation at each meeting, as well as a question and answer period.

[88] Finally, the Board is mindful that the above public consultation process had to be carried out in a timeline that was somewhat compressed, considering the overall timeline set out in the *Act* and the time needed by the Co-ordinator and the Committee to ensure the orderly conduct of the first municipal election in March 2020, and the transition to the new Regional Municipality, which is to take effect April 1, 2020.

[89] In hindsight, Stantec and municipal staff supporting Mr. Heseltine would possibly have made some different choices regarding scheduling and advertising of the public meetings, or with the content and distribution of the survey. However, the overall process was comprehensive and accessible. In the Board's view, any of the deficiencies noted by THIDA were minor in nature and not material to the conduct of the exercise.

[90] THIDA alleged that the survey created confusion over whether the position of Mayor was included in the council size options identified during Phase 1. On this point, the Board accepts the testimony of Mr. Heseltine that he received no comments or complaints about this issue. Further, if any confusion arose during Phase 1, it was clearly

put to rest in Phase 2, which outlined the council size options, with accompanying maps of the polling districts.

[91] Taking all of the above into account, the Board considers that THIDA's criticism of the public consultation process was unfounded. The consultation process implemented by Stantec, as supported by the Co-Ordinating Committee and staff, was both reasonable and appropriate in the circumstances.

**(iii) Hantsport**

[92] THIDA submitted that Hantsport should be afforded its own polling district in the new Regional Municipality. In its view, Hantsport has a distinct community of interest which should be reflected in its unique polling district. THIDA takes this view for either the 9- or 11- district scenario, adding that a separate polling district in a 12- district scenario may be even more appropriate, presumably because, under a 12- district scenario, it would reduce the rather large variance from the average number of electors per district. For example, the variance would be -33.7% for an 11- district council, but it would decrease to -27.7% for a 12- district council.

[93] The Board notes that THIDA's position does not appear to have any broad support from the public. Only five letters of comment filed with the Board addressed this issue. No member of the public registered to speak at the Board's evening session. Mr. Heseltine also confirmed that apart from appearances by a few THIDA members during the public consultation sessions conducted by Stantec, the Hantsport issue was not raised in the public meetings or in survey responses. In the Board's opinion, it is reasonable to assume that if this issue had been a concern for Hantsport residents, they would have responded in greater numbers to convey their comments to the Board.

[94] THIDA has taken a very narrow view of the term "community of interest" as it relates to this application. Mr. Heseltine identified 51 named communities in West Hants. None of these communities will have their own unique voice in the new Regional Municipality governance structure. Most of these 51 communities will be combined with other communities to form polling districts. Even larger communities that are similar in population to Hantsport, like Falmouth and Brooklyn, will not have their unique polling district. In those cases, the communities are combined with others to form new polling districts. In fact, Falmouth will be divided among three districts: Districts #7, #8, and #9.

[95] As noted by the Board in earlier decisions, there may indeed be various different communities of interest that overlap one another in a municipality: see *HRM Decision*, para. 113. The political boundaries of the former town of Hantsport, with its corresponding area rate, are factors to be considered in assessing community of interest. However, other factors are also relevant, such as geography, road networks, fire protection coverage, catchment areas for shopping and business enterprise, as well as for recreational activities, and other factors. All such factors have to be considered in totality when determining what is the appropriate community of interest in a municipality.

[96] Further, the Board considers that council size, itself, may also play an important part in defining the appropriate community of interest, when combined with its direct mathematical relationship to relative parity of voting power. The communities of interest in a municipality may be materially impacted by the total number of polling districts. To illustrate the point, the communities of interest reflected in polling districts will necessarily be different in a 5, 10 or 15- district scenario for council.

[97] Thus, as it relates to Hantsport, the various communities of interest must be assessed in determining polling district boundaries. The number of electors in each polling district, as impacted by council size, will also have an impact on the drawing of district boundaries. In the end, all these factors must be taken into account in determining the appropriate configuration of polling districts. In this context, the Board does not accept THIDA's submission that the former Town boundaries form the only line of delineation for districts in the new Regional Municipality.

[98] The Board accepts the Co-ordinator's submission that the Board should also take into account the broader intent of the *Act*, which is to create a new Regional Municipality. In that context, it is reasonable to conclude that the drawing of polling district boundaries should reflect a council that is structured to take a regional perspective, rather than protecting parochial or territorial constituencies with the former municipality.

[99] Further, the Board observes that assigning a separate polling district which reflects the strict community boundaries of Hantsport would significantly offend the Board's guidelines respecting appropriate variances from the average number of electors per district. This requirement is specifically referenced under s. 368(4) of the *MGA* as relative parity of voting power. As noted earlier in this Decision, the Board has determined that the target variance for relative parity of voting power shall be  $\pm 10\%$  from the average number of electors per polling district.

[100] If the Board were to accept THIDA's submission to create a distinct polling district for Hantsport, the resulting variances for each scenario would significantly exceed the target of  $\pm 10\%$ : i.e., -27.7% for the 12- district scenario; -33.7% for the 11- district scenario; and -45.7% for the 9- district scenario. The Board notes that each of these

three results also exceed the maximum  $\pm 25\%$  which the Board may accept in exceptional circumstances.

[101] In the Board's opinion, granting Hantsport its own polling district would give electors in that polling district too much voting power relative to electors in other districts of the new Regional Municipality. This result would be neither reasonable nor appropriate.

[102] As support for its position, THIDA also referred to the conclusions in the report of the 2019 Nova Scotia Electoral Boundaries Commission, wherein it recommended eight provincial electoral districts which exceeded the  $\pm 25\%$  variance due to exceptional circumstances. One of these recommended districts was Queens, based on its "political boundaries", which THIDA said applied to Hantsport.

[103] While the municipal boundary review conducted by the Board under the *MGA* and the work undertaken by the Nova Scotia Electoral Boundaries Commission both apply very similar principles and guidelines, the Board considers that not all findings made in the provincial context necessarily carry over to the municipal space. The issue of "political boundaries" is one such example. The case of Queens at the provincial level is distinguishable from the situation of Hantsport at the municipal level. The Board considers that THIDA's request to make Hantsport a separate district is not justified on the basis of political boundaries as in the recommendation of the provincial Electoral Boundaries Commission respecting Queens.

[104] The Board is mindful that when the Town of Hantsport was recently dissolved, the Dissolution Order directed that the area comprising the former Town be reflected as a separate polling district on municipal council for the Municipality. As noted

by THIDA, the Board also accounted for Hantsport's distinct community of interest in the subsequent municipal boundary review. The Board stated:

[39] The Dissolution Order increased the council to 10 by adding a representative from the former Town of Hantsport. No evidence was led as to whether this increase was an issue of concern. The Municipality relied upon the Stantec Report to support the Application to have nine councillors. As has been stated the Report was based upon consultations undertaken before the hearing on the town's dissolution was held. No study was performed to determine if the view of the public had changed since July 1, 2015, the date of dissolution.

[40] Because of the lack of further study and/or discussion by the Municipality about the size of council since July 1, 2015, and because of a possible dilution of representation within the former unamalgamated Municipality of the District of West Hants, the Board finds that the council size should be set at 10, with the former town of Hantsport comprising one polling district.

[41] By maintaining the number of councillors at 10 (the number that presently exists after the dissolution of the town), the variance in electors for the former town of Hantsport is -26%. The Board finds, for the purpose of this upcoming municipal election, this to be a reasonable variance when considering all of the above factors and submitted evidence. As has been stated earlier in this Decision, this does not mean that such a large variance would be acceptable in future applications. [Emphasis in original]

*[Municipality of West Hants, 2016 NSUARB 44, paras. 39-41]*

[105] However, it is also clear from the 2016 Decision that the Board did not intend to create a polling district of a permanent nature for the community of Hantsport. The Board noted at the time that the resulting large variance for relative parity of voting power would not be acceptable indefinitely. This was acknowledged by THIDA during the hearing. In the Board's view, the effect of the 2016 Decision was to provide Hantsport with a voice on council during the important initial transitional period following dissolution. Hantsport's unique polling district was an interim measure, the only issue being how long its status would continue.

[106] Mr. Heseltine specifically addressed the Hantsport issue in the Stantec Report:

5.1.3. Hantsport

A few residents from Hantsport have asserted that the former town should continue to be a separate district as approved by the NSUARB in 2016. At our boundaries consultation

meeting in Hantsport, two participants contended that the Board had recognized Hantsport as a "community of interest" and that designation justified the ongoing separation of the former town from adjacent communities such as Mount Denson and Bishopville.

A wide range of arguments counter this position. To begin with, all 51 communities in West Hants as well as the Town of Windsor, can be regarded as communities of interest. Most of them are combined in other districts and some have been split between districts to meet the NSUAR's parity criterion and/or to address other considerations.

With 921 electors, Hantsport on its own falls well short of the average number of electors with either eleven (-33.7%) or nine (-45.7%) districts [sic]. The community is separated from many areas of West Hants by Highway 101; however, at least two of the communities the residents in question are resisting joining (i.e., Bishopville and Hants Border) are only accessible via Hantsport.

In its 2016 decision, the Board was clear that Hantsport should not "always be considered as [a separate community of interest] for future polling district boundary reviews." Our view is that it is time to incorporate Hantsport with adjacent communities in the same manner as other communities in the region. [Emphasis added]

[Stantec Report, Exhibit W-1, Tab C, p. 45]

[107] The Board accepts, and adopts, Mr. Heseltine's reasoning on this issue.

[108] Taking into account all of the above, the Board concludes that the community of Hantsport should not be afforded its own polling district, whether it be in a 9-, 11- or 12- district scenario.

**(iv) Council size**

[109] The Co-ordinator has applied to the Board for approval of 11 polling districts, each electing one councillor. As noted earlier in this Decision, the 11- district scenario was recommended by Stantec after it conducted its consultation.

[110] Mr. Heseltine testified that after excluding a disproportionate number of survey responses from the current District #3, there were generally an equal number of responses favoring a 9- district and 11- district scenario. In the end, he testified that he proceeded in a fashion which he considered to be the most beneficial in the process of establishing a new government for the Regional Municipality, recommending the 11- district scenario. Mr. Heseltine chose this number to provide greater rural representation

on the new council. In his view, this incremental approach would provide greater buy-in from the rural residents of the region, noting that the survey results had shown this constituency was the most sceptical about regional government. In doing so, Mr. Heseltine highlighted the importance of buy-in to the success of new regional government, as outlined in Dr. Baxter's Report.

[111] Dr. Baxter described the need to address "buy-in". He stated that the tendency to prefer pre-amalgamation patterns of representation:

...highlights the importance of securing "buy-in" from constituents and community leaders at the outset of consolidation - and of using buy-in as an additional factor in determining polling districts toward the goal of establishing a strong political foundation for future reforms down the road. Research has found that buy-in may be especially important in circumstances where a regional consolidation is driven wholly or in part by senior government and/or municipal officials. Rosenfeld and Reese (2005) note that lack of local support in some "top-down" amalgamations can lead to a more protracted transition process "because there is no political buy-in on a larger scale." The fact that the consolidation of the Town of Windsor and the Municipality of the District of West Hants is a response by the provincial government to requests from both Councils forms an important part of this context for [Windsor West Hants].

[Baxter Report, Exhibit W-1, Tab A, p. 21]

[112] Ultimately, Mr. Heseltine recommended an 11- district council in the Stantec Report:

While the difference between a council of ten or twelve [including the Mayor] is hardly dramatic, commentary through consultation at meetings and interviews, and well as through two surveys, showed a clear divide between supporters of each scenario. Individuals who favour nine districts were more likely to favour consolidation. They are seeking a more efficient council that will be able to take full advantage of co-ordinated service delivery through the regional municipal structure. Those who would prefer eleven were most concerned with representation of their communities and easing into regional governance.

Opinions concerning boundaries reflected similar priorities. While some supporters of nine districts did not necessarily endorse all boundaries proposed, most were comfortable with major features such as the division of the Town of Windsor among several districts and the combination of urban, suburban, and rural areas in many of the proposed districts. Proponents of eleven districts generally did not like those features of the nine-district approach. Many comments suggested they wanted to minimize change from the current district arrangement in West Hants. Many also commented that the eleven-district scenario "kept communities together."

As we have noted and results of both surveys quantified, preference for a larger or smaller council correlated with geography. Urban residents were the strongest supporters of a

small council followed by suburban residents (including Hantsport). Rural residents favoured a larger council, frequently stating that it would provide better representation for their communities and more manageable areas for their councillors to serve. ... however, we expect that concerns for the ratio of residents to council representatives and for a more gradual transition of governance arrangements will continue to prevail for most who prefer eleven districts.

...

## 5.2. Recommendation

The most important consideration for the many decisions that the Co-ordinating Committee must make as it works toward consolidating of the Town of Windsor and the Municipality of the District of West Hants on April 1, 2020, will be the implications of each choice for the success of the future regional municipality. That choice, in the case of this Governance Review, is between "ambitious change" and "incremental change" as outlined by Dr. Baxter. Ambitious change, we assume, will make the most of the potential of consolidation as quickly as possible after the new municipality is formed. Incremental change, as Dr. Baxter states, will encourage acceptance from those who are less committed to the new structure.

As we are confident that residents who support consolidation will encourage the new municipality to achieve its potential regardless of council size or boundary arrangements, we feel the more important issue for the success of the municipality is to bring those who are doubtful into the fold. In reaching that difficult decision, we noted that the NSUARB has supported larger councils in the initial terms of regional municipalities and some municipalities enlarged as a result of dissolutions. We also noted that in those cases, council numbers have eventually been reduced as the municipalities in question have matured.

...

## Recommendation

Taking into account the foregoing considerations, we recommend the Council of the Regional Municipality of Windsor and West Hants should consist of a Mayor elected at large and eleven Councillors...

[Stantec Report, Exhibit W-1, Tab C, pp. 43-44 and 46-47]

[113] The only other option discussed during the hearing was THIDA's submission that the Board should consider a 12- district scenario, which would provide Hantsport with its own polling district that THIDA said would recognize its distinct community of interest. For the reasons set out earlier in this Decision, the Board did not accept THIDA's submission that the council size should be increased to reflect Hantsport's community of interest.

[114] As noted earlier, the Board considers it appropriate to take account of the context in which the present application was made to the Board. This application is the result of the creation of a new Regional Municipality, resulting from the consolidation of the Municipality of West Hants and the Town of Windsor into a new municipal unit under the *Region of Windsor and West Hants Municipality Act*. In the Board's view, appropriate regard should be given to the intent of the statute which is to create a new regional government by combining a former town and municipality. The *Act*, at least impliedly, reflects an intention to create a new municipal government having a regional perspective. The Board notes that the present matter is not the usual municipal boundary review under the *Municipal Government Act*, where there is little change in the number of total polling districts and the discussion often proceeds to a realignment of boundaries rather than a material change in council size.

[115] The Board notes that the current application reduces the number of elected officials in the region from 15 (including Windsor's Mayor) down to 12 (including the Mayor for the new Regional Municipality). Adding another polling district simply to reflect Hantsport's community of interest (without regard to relative parity of voting power and other factors) would not be consistent with the general intent of the new statute creating a Regional Municipality.

[116] The Board finds that with the creation of a new Regional Municipality, representation on the new council should assume a more regional approach reflected in a smaller number of councillors and polling districts.

[117] Taking all the above into account, the Board is satisfied that the Co-ordinator has demonstrated, on the balance of probabilities, that the number of councillors should be set at 11 (excluding the Mayor).

**(v) Polling district boundaries**

[118] At the conclusion of Phase 2 of the consultation process, Mr. Heseltine made various final adjustments to some polling district boundaries, relying on information he received in the public meetings and his interviews with the councillors, individually and as a group. Most of the adjustments addressed points related to communities of interest, while a few incorporated more recognizable boundaries (e.g., such as Highway #101 between District #8 and #9). In a final presentation of his recommendations to the Co-ordinating Committee and both councils, the various adjustments met with their approval.

[119] The Board also notes that, with one exception, all variances from the average number of electors per district for the proposed polling districts fall within the  $\pm 10\%$  guideline applied by the Board. The variance of  $-12.5\%$  for the district of Walton-Centre Burlington, was justified by Stantec in its Report.

[120] Earlier in this Decision, the Board concluded that the community of Hantsport did not require its distinct polling district on the new Regional Council, or an adjustment to the boundaries of that polling district. No other concerns were raised with the Board about that district, or any other polling district boundaries.

[121] The Board approves the polling district boundaries with respect to the 11 polling districts, as outlined in the Windsor-West Hants Governance Review Council Size and Polling District Boundaries Report, dated April 10, 2019, prepared by Stantec.

**(vi) Filing of digital maps of polling districts**

[122] The application contains a digital map of the proposed polling district boundaries. In an Undertaking filed after the hearing, the Co-ordinator requested that the polling district descriptions be shown by way of digital maps, rather than written descriptions.

[123] In recent years, some municipalities and towns have requested to provide the descriptions of its polling districts or wards using digital GIS technology. While the Board is mindful of the benefits of digital mapping over text descriptions, both in terms of cost and efficiency, the important factor to be considered is the subsequent use of any polling district or ward descriptions during the conduct of municipal elections. Regardless of the format which is adopted by a municipality or town, the description must be able to address any inquiry made by electors or municipal election staff during the conduct of municipal elections. Accordingly, it is necessary that the scale of any digital mapping descriptions be capable of being adjusted to respond to any inquiry. In addition to filing a large hard copy map showing all polling districts, the Board also requires the separate filing of individual digital mapping for each polling district or ward.

[124] The Board approves the filing of the digital polling district maps by the Co-ordinator. The Board directs the filing of 8½ x 11 inch maps for each polling district.

**(vii) 2022 Municipal Boundary Review**

[125] Under s. 369 of the *MGA*, the next regularly scheduled municipal boundary review shall occur in 2022.

[126] In their testimony at the hearing, the CAOs for the current Town and Municipality confirmed they are aware that a municipal boundary review will be required

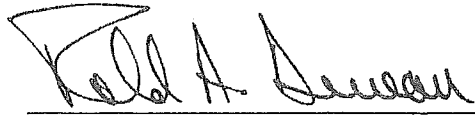
in 2022, which will provide officials in the new Regional Municipality the opportunity to review the new council size and polling district boundaries.

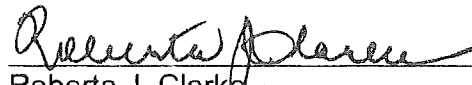
## VII CONCLUSION

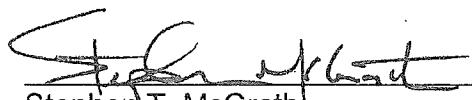
[127] The Board approves the application. The Board sets the number of polling districts at 11, each electing one councillor. The boundaries of the polling districts are established in accordance with the configuration of polling districts outlined in the Stantec Report for the 11- district model.

[128] An Order will issue upon the filing of the individual digital maps for each polling district.


**DATED** at Halifax, Nova Scotia, this 19<sup>th</sup> day of August, 2019.

  
\_\_\_\_\_  
Roland A. Deveau

  
\_\_\_\_\_  
Roberta J. Clarke

  
\_\_\_\_\_  
Stephen T. McGrath





# DATA ANALYSIS OF THE SURVEY FOR WINDSOR/WEST HANTS (STRONGERREGION.CA)

Date: January 16, 2020

## **Abstract**

The report outlines the data analysis performed on the data obtained through an online survey. The purpose of the survey was to gauge people's opinions on the amalgamation between Windsor and West Hants.

Sathaporn (Hubert) Hu, Derek F. Reilly

## Executive Summary

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A survey was conducted over a six-month period to gauge residents' opinions on the amalgamation. It was conducted online through [strongerregion.ca](http://strongerregion.ca). We asked the residents about (1) the potential benefits of the amalgamation, (2) the most significant challenge of the amalgamated municipality, (3) what should be the first priority of the amalgamated municipality, and (4) the new name for the municipality. There were 1054 respondents in total, 687 respondents were from West Hants, 204 were from Windsor, and 154 were from outside the region. We found that the councillors and staff were successful in getting responses all around the West Hants and Windsor region despite the low population density in certain areas of West Hants.

We excluded 139 respondents from the analysis of the first question, because their responses to the first question are missing. Therefore, in total, we analyzed only 915 responses to the first question. Overall, most respondents (659 respondents) believed that the amalgamation will be beneficial for the region. Many believed that the increase in cooperation (235 respondents) and sharing of resources (106 respondents) in Windsor/West Hants would be beneficial. They believed that the government would become more efficient (247 respondents). There were some negative responses (177 respondents) most of which from the residents of West Hants (59 respondents).

While many respondents believed that the increased cooperation would be beneficial, most (411 respondents) also indicated that cooperation between West Hants and Windsor would be the most significant challenge in the second question. Many respondents (122 respondents) also indicated that creating a new and fair tax scheme to be another challenge. Some respondents (71 respondents) indicated that the most significant challenge would be to ensure the fairness between the rural and the urban residents. Interestingly, some respondents (66 respondents) already believed that the amalgamation will be beneficial; however, there should be more effort in informing other residents of the benefits.

For the third question, we found that respondents (178 respondents) deemed improvement of transportation to be the top priority. Particularly, they (55 respondents) would like the roads to be improved. Interestingly, we found multiple respondents (47 respondents) indicating the unconnected roads around "The Crossing" to be the most pressing issue. The second priority is the tax system (115 respondents). The rural residents would like the new system to be fair. The third priority is the improvement of services (97 respondents) – particularly fire service. Rural residents (62 respondents) also expressed interests in having improved access to the Internet.

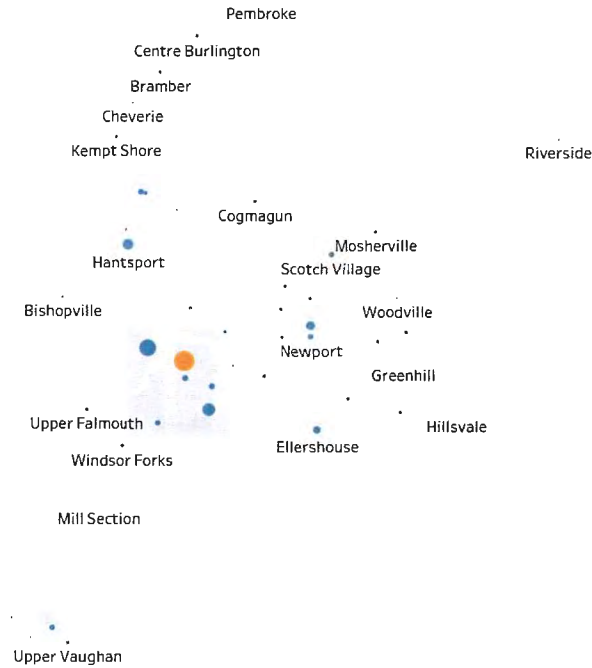
Most respondents (358 respondents) indicated that the new name should simply be "West Hants." "West Hants" is the most popular name among the residents of West Hants and the people who reside outside West Hants and Windsor. Meanwhile, "Avon" is the most popular name among the residents of Windsor. However, we found that "West Hants" is still the second most popular name in Windsor – meaning that a large number of Windsor residents do not mind that "Windsor" is not in the new name. Overall, the five most popular names are: West Hants (358 respondents), Avon (125 respondents), Windsor/West Hants (125 respondents), Windsor (65 respondents), and Hants West (32 respondents).

# Profile of the Respondents

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## *The Communities of the Respondents*

We found that 687 respondents were from West Hants, 204 were from Windsor, and 154 were from elsewhere. The figure below shows the distributions of the respondents that live in Windsor and West Hants. Most of the respondents were clustered around Windsor. However, the map does indicate that efforts taken by Councillors and staff were successful in obtaining a representative sampling – despite the low population density in certain areas.



**Figure 1: The map which shows the distributions of the respondents. The size of each dot represents the number of respondents from the specific community. The smallest dot represents 1 person and the largest dot represents 204 people. Orange denotes Windsor and blue denotes West Hants communities.**

## *Age Distribution*

We found that the age groups tend to skew toward the older age group. In total, we found only nine respondents were the age of below 18, and only 24 respondents with the age between 18 to 24. When we broke down the age by area, we found that West Hants had a significant skew toward older people.

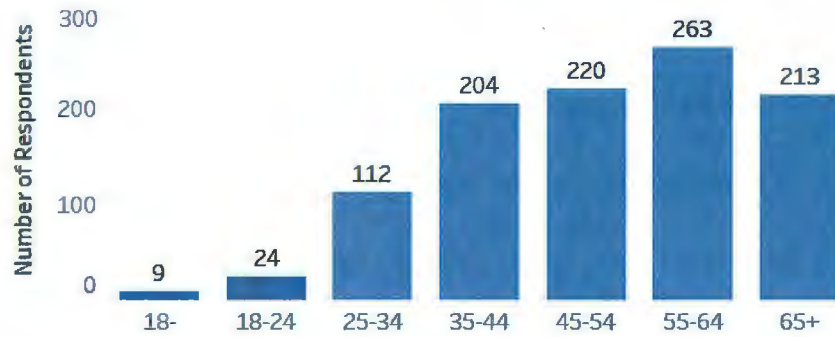


Figure 2: The chart representing the overall age ranges of the respondents.

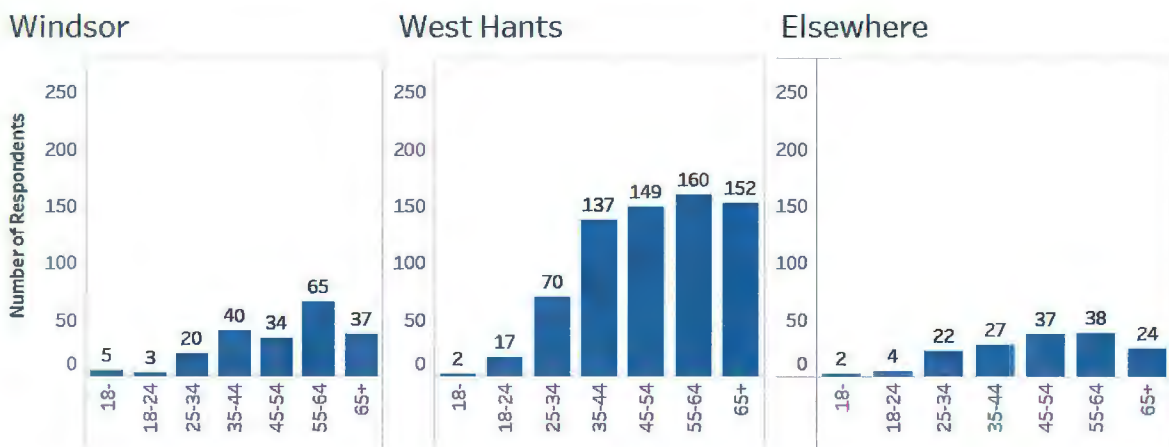


Figure 3: The chart representing the overall age ranges of the respondents in particular areas – LEFT: Windsor, CENTRE: West Hants, RIGHT: Outside both Windsor and West Hants.

## The First Question: The Most Significant Benefits

In the survey, each participant was asked three questions. The first question they answered was: “What do you see as the biggest benefit of Windsor/West Hants joining together?” For this question, we analyzed the answers using thematic analysis. We tagged each response with the following:

- **Primary Tags:** These tags describe major themes. They are somewhat vague in nature. For example, the tags that appeared the most often are “Efficiency.” “Efficiency” here can mean many types of “Efficiency.” However, it is further elaborated by the Secondary Tags.
- **Secondary Tags:** These tags provide additional information to the primary tags. For example, when a response is tagged with the primary tag, “Efficiency”, it might be accompanied by the secondary tag “Cost Saving” which signifies that the efficiency is in terms of less costs.
- **Positivity:** Each response is also rated as “Negative”, “Neutral”, or “Positive.” While the question specifically asked for benefits, some respondents may also decide to not directly answer the

question. Instead, they might use the answer to explain why the amalgamation will not produce a positive result.

Due to a server issue, we lost the responses for the first questions from 139 respondents. Therefore, we excluded them from the analysis. Since the server did not lose the respondents' answers for the other questions, they were included in the analysis for the other question. Despite the removal, we still have 915 answers which is sufficiently large to be representative.

### ***Primary Tags***

We found that for the primary tags, the ten most popular themes are:

1. **Efficiency** (247 respondents): All of the responses with this tag are positive which means that many respondents believed that the amalgamation would lead to a more efficient government.
2. **Cooperation** (235 respondents): Almost all of the tags are positive which means that the respondents believed that the amalgamation would lead to increased cooperation between Windsor and West Hants. Two respondents provided a neutral response while one provided a negative response.
3. **Nothing** (146 respondents): There are 122 neutral responses. These responses mean that many respondents did not see any benefits. Fifty-four responses were negative which indicates that the respondents viewed the amalgamation as a negative process.
4. **Combined Resource** (106 respondents): All the answers with this tag are positive which means that many respondents believed that Windsor/West Hants will be better off by combining their resources.
5. **Service** (87 respondents): Many (86 respondents) believed that the services they receive will improve after the amalgamation. However, one did not have a positive answer to this.
6. **Tax** (78 respondents): Many (66 respondents) believed that the tax scheme after the amalgamation would be fairer or reduced. Four respondents provided neutral responses which we are uncertain about their exact meaning. Some respondents (8 respondents) believed that the tax scheme would be worse after the amalgamation.
7. **Unsure** (35 respondents): Some respondents indicated that they did not know what the benefits would be.
8. **Development** (34 respondents): Some respondents believed that the amalgamation could kickstart additional development in the area.
9. **Budget** (33 respondents): Some respondents believed that the municipal budget after the amalgamation would be better. For example, funds can be distributed better in the region.
10. **Politics** (32 respondents): Some respondents believed that the amalgamated municipality would have better politics.

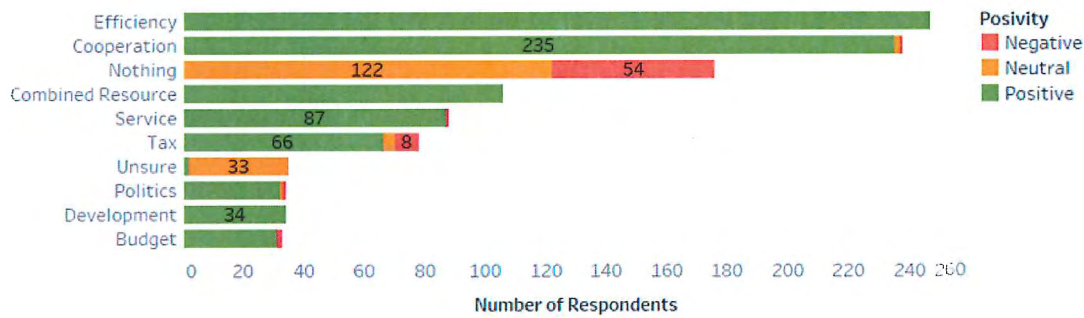


Figure 4: The truncated table of the frequency of the primary tag for the first question. The full table is available in the appendix.

### Area Difference

Although we prefer to analyze the area differences of the primary tag frequencies by comparing the charts, we are unable to do so. Since there are so many tags, comparing charts visually is extremely difficult. Instead, we computed Kendall's Coefficient Concordance. Kendall's Coefficient of Concordance is a number between 0 and 1 which indicates how much the areas are similar to each other. 0 means no similarity and 1 means all primary tags have the same ranks in all areas (Windsor, West Hants, and outside the region). We found the coefficient to be  $W = 0.80$  which is large. This means that ranks of primary tags in all areas are largely similar to each other. The break down of the response positivity is as following:

- Windsor: 6 negative, 15 neutral, 151 positive.
- West Hants: 59 negative, 131 neutral, 408 positive.
- Elsewhere: 4 negative, 31 neutral, 100 positive.

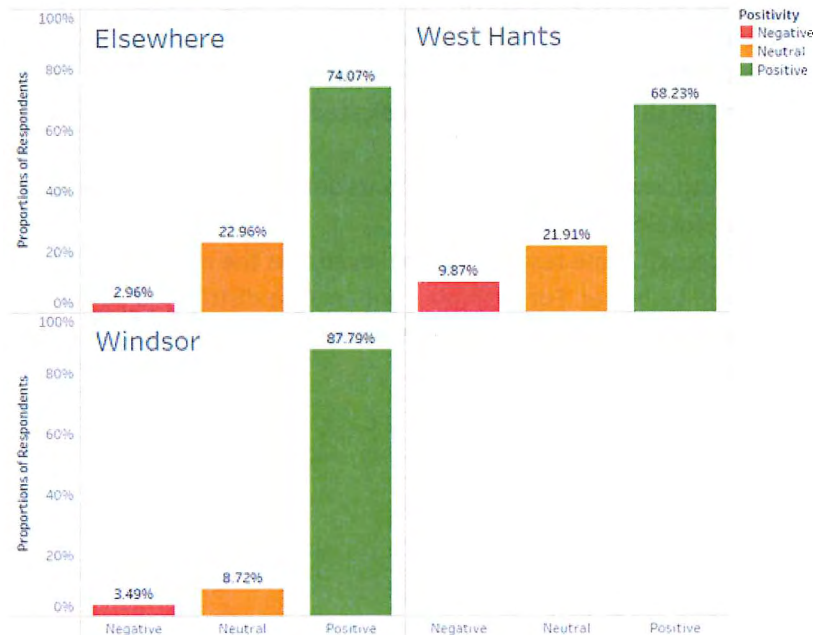


Figure 5: The proportion of negative, neutral, and positive answers by area.

## Secondary Tags

To better understand the primary tags, we also analyzed the secondary tags. We found most answers are too simplistic to be given secondary tags. Therefore, we only have a small number of them. However, the ones that have secondary tags provide additional information to the primary tags of Efficiency and Service. We found that most respondents believed the amalgamation will lead to cost savings, and the streamlining of services and government. Some also believed that the new government would also be more effective at decision making and providing voice to the larger bodies such as the provincial and the federal governments. We found 15 respondents also indicated that the amalgamation would not be beneficial to West Hants.

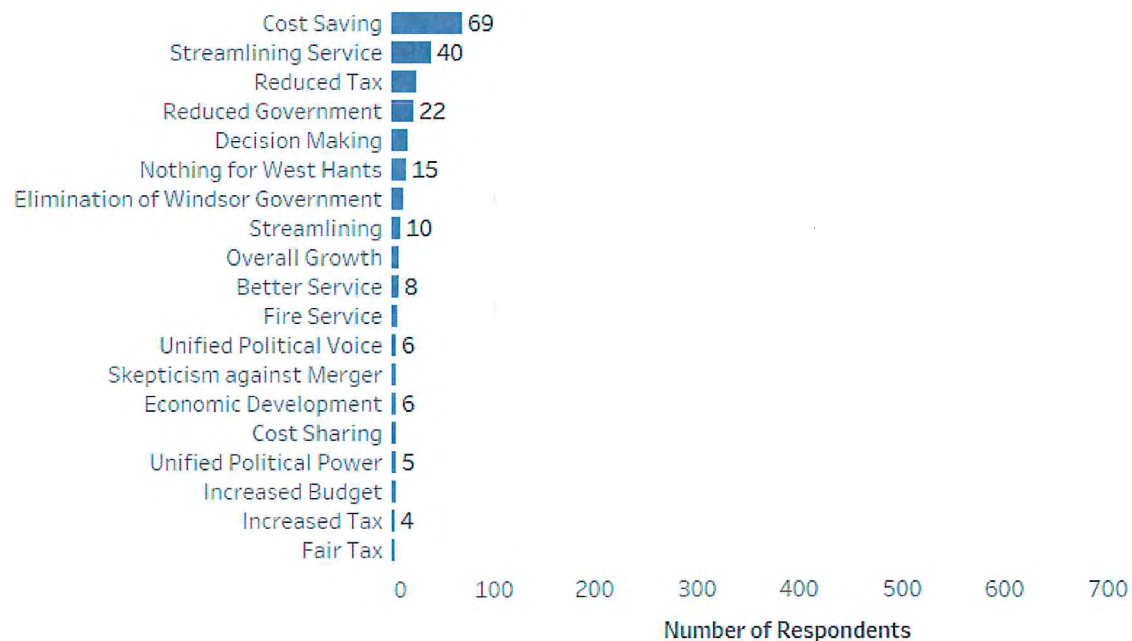


Figure 5: The truncated chart for the distribution of the secondary tags. The full table is available in Appendix A. Null (red bar) means that the answers are too simplistic for secondary tags to be assigned. The table with all the tags and their frequencies are available in the appendix.

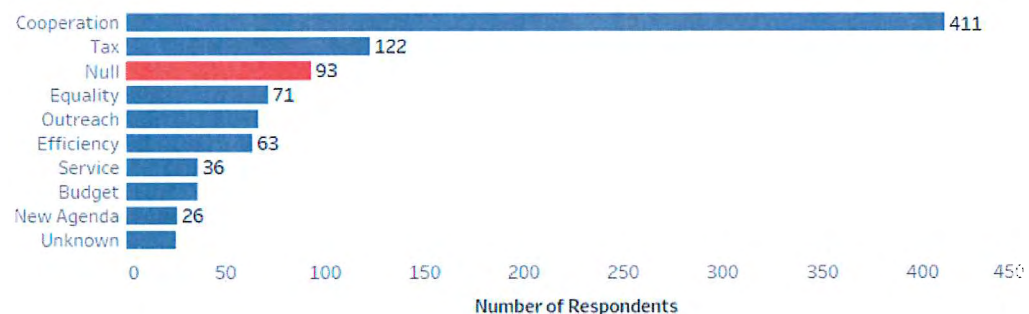
## Second Question: Biggest Challenge

The second question that each respondent answered was: “Now that Windsor-West Hants are joining together, what do you think will be their biggest challenge?” There are 1054 answers to the question. Since the question does not ask for answers that can be normative like the first one, we did not tag the answer with positivity.

### Primary Tags

We found that the top ten primary tags are as follows:

1. **Cooperation** (411 respondents): Most believed that cooperation would be the most significant challenge despite a large number of respondents believing that cooperation between West Hants and Windsor would improve.
2. **Tax** (122 respondents): Many believed that creating a fair tax scheme would be a great challenge.
3. **Null** (93 respondents): Some respondents did not have anything to indicate as a challenge.
4. **Equality** (71 respondents): Equality here means that all residents will be treated fairly by the new government. Many West Hants residents expressed concerns about being treated less fairly than the residents of Windsor.
5. **Outreach** (66 respondents): Some respondents believed that amalgamation would be beneficial, but there should be more effort to inform other residents who had some reservation about the amalgamation.
6. **Efficiency** (63 respondents): Some respondents believed that merging the two governments and making the new one work efficiently may be challenging.
7. **Service** (36 respondents): Some respondents believed that improving services would be challenging.
8. **Budget** (36 respondents): Some respondents believed that creating new budgets for the new government would be challenging.
9. **New Agenda** (26 respondents): Some respondents believed that the new government may have a difficult time setting new priorities, policies, and plans among other things.
10. **Unknown** (26 respondents): The responses provided by the respondents are difficult to understand, cannot be tagged properly.



**Figure 6: The overall distribution of the primary tags (truncated) for the second question. Null (red bar) represents the number of respondents who did not answer the question. The full chart is available in the appendix.**

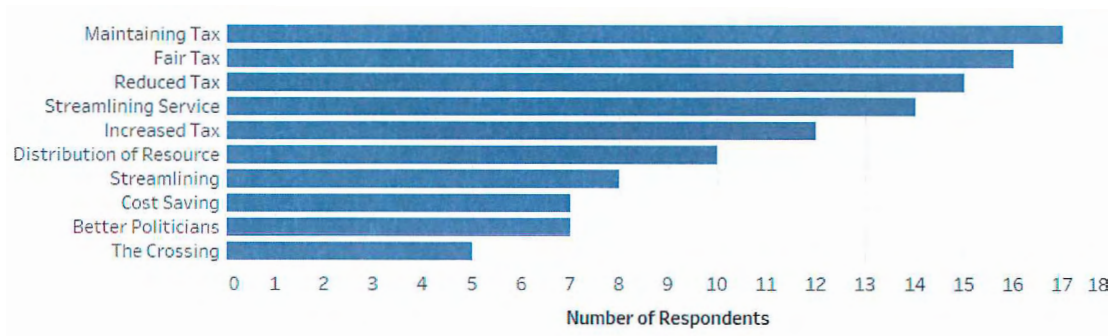
### **Area Difference**

To determine if there is any difference between frequencies of the tags from the residents of Windsor, the residents of West Hants, and those who live outside the region, we computed Kendall's Coefficient of Concordance. We found the coefficient to be  $W = 0.71$  which is large. This means that the residents of the three areas largely agree with each other on the priorities of challenges.

### **Secondary Tags**

We found that the top secondary tags are mostly about tax, efficiency, and the government. Overall, some of the tags' frequencies are very low, we do not think that they are representative. Because of

this, we decided not to analyze the secondary tags in detail. Figure 7 contains the top ten secondary tags.



**Figure 7: The top ten distributions of the secondary tag (truncated). The full chart is available in Appendix A.**

### Third Question: First Thing the new Municipality should address

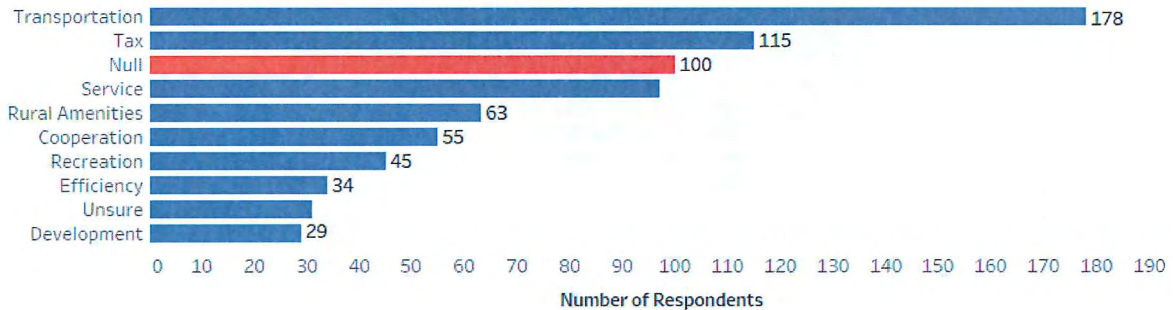
The third question is “What’s the first thing the new municipality should address.” We analyzed the responses from all respondents. We tagged all the answers with primary tags and secondary tags.

#### *Primary Tags*

We found that the top ten primary tags are as follows:

1. **Transportation** (178 respondents): Most of the respondents were concerned about transportation in the area. Particularly, they would like the new municipality to improve the road and to connect more roads in the area (especially the road connection in “The Crossing”).
2. **Tax** (115 respondents): The respondents would like the new municipality to create a fair tax system that is fair to both the residents of Windsor and West Hants. Particularly, they would like the tax to be based on what they use. For example, if someone does not have a sidewalk outside their place, then they should not have to pay for sidewalk maintenance through their property tax.
3. **Null** (100 respondents): The respondents did not provide any information.
4. **Service** (97 respondents): The respondents would like the new municipality to improve services. Particularly, they would like an improvement of the fire service.
5. **Rural Amenities** (63 respondents): While this tag means that the rural area has the same level of amenities with the urban area, the respondents here mostly referred to rural Internet access. Many respondents would like the rural area to have quality access to the Internet.
6. **Cooperation** (55 respondents): Windsor and West Hants should integrate and work in a cooperative manner in the new municipality.
7. **Recreation** (45 respondents): The respondents would like to have better recreation facilities in the area – such as a new rink and converting the railway into a trail.
8. **Efficiency** (34 respondents): The new municipality should set up a government that is efficient. It should aim to cut costs.
9. **Unsure** (31 respondents): The respondents were unsure of what to put as answers.

- Development** (29 respondents): The new government should focus on bringing more development into the area. It should focus on attracting new business and growth.



**Figure 8: The top ten distributions of the primary tags for the third question. Null (red bar) signifies that the respondents did not provide any answer. The full chart is available in Appendix A.**

### Area Difference

We found that Kendall's Coefficient of Concordance is  $W = 0.75$  which means that the three areas have similar primary tag distributions.

### Secondary Tags

We found many secondary tags for the answers. Therefore, we decided to analyze them in more detail. The top ten secondary tags are:

- Rural Internet** (62 respondents): Of all the rural amenities, the respondents would like to have better access to the Internet in the rural areas the most.
- Fire Service** (58 respondents): The new municipality should work to improve the fire service – including the issue of fire coverage.
- Roads** (55 respondents): The respondents would like better roads and better infrastructure.
- “The Crossing”** (47 respondents): “The Crossing” refers to an area between Windsor and West Hants where roads are not well-connected. Due to poor road connections, residents in the area have to make unnecessarily long trips to reach certain landmarks in the area.
- Streamlining Services** (22 respondents): The new municipality should focus on integrating the services of Windsor and West Hants together.
- Reduced Tax** (20 respondents): The new municipality should find opportunities to reduce the tax rate for the residents.
- Attracting Business** (19 respondents): The new municipality should aim to attract new businesses into the area.
- Better Road** (18 respondents): The new municipality should fix and maintain the current roads.
- Cost Saving** (17 respondents): The new municipality should aim to reduce the costs currently incurred by the Windsor and the West Hants councils.
- Fair Tax** (10 respondents): The new municipality should design a new tax scheme that is fair to everyone.

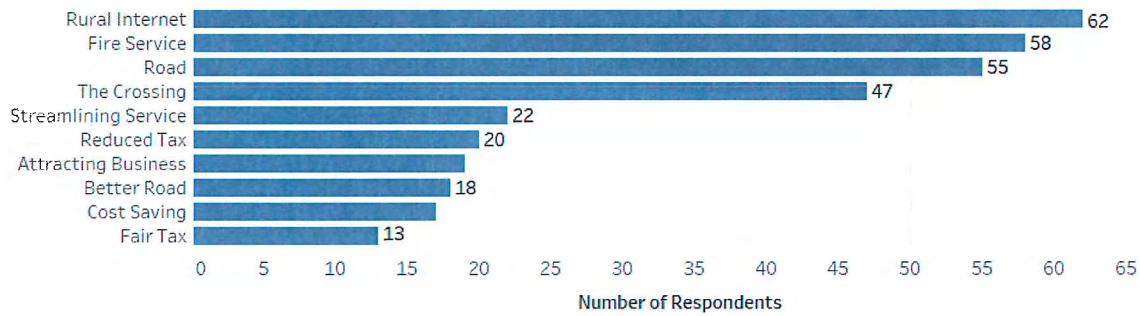


Figure 9: The top ten secondary tags for the third question. All of the data are available in Appendix A.

## Fourth Question: New Name

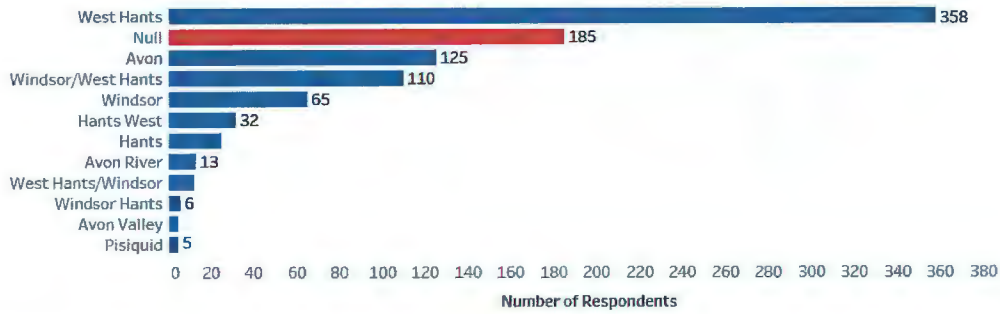
In the survey, respondents had an opportunity to provide new names by answering the fourth question. The fourth question asks, “What is your suggestion on possible names for the new municipality?” While many respondents would not only provide a name, they would also provide the title of the amalgamated entity as well, such as “The Municipality of West Hants” instead of “West Hants.” In our analysis, we ignored the title and simply analyzed the name. We did so because we did not want to treat variations of the same names as totally separate names.

Overall, the five most popular names are: West Hants (358 respondents), Avon (125 respondents), Windsor/West Hants (125 respondents), Windsor (65 respondents), and Hants West (32 respondents). We also noted that some people also provided tongue-in-cheek names such as “Washmyhants.” However, the number for each name is very small. Therefore, we can conclude that there is no campaign to give the new municipality a comedic name in the vain of the “Boaty McBoatface” campaign.<sup>1</sup>

We found that Kendall’s Coefficient of Concordance is:  $W = 0.39$  for Windsor, West Hants, and elsewhere. This means that the people in the three areas do not agree as much on the naming. Despite the lower level of agreement, we still find “West Hants” to be a relatively popular name. This name is the most popular among the residents of West Hants, the second most popular among the residents of Windsor, and the most popular among the residents that live elsewhere. Therefore, “West Hants” is unlikely to be a divisive new name.

A few people also mentioned names that should not be used. Eight people did not want the name to be “Avon.” Four people did not want the name “Windsor/West Hants.” One individual did not want “West Hants” and another did not want “Windsor.” However, the numbers of such people are few.

<sup>1</sup> Here is one news article on the “Boaty McBoatface” campaign:  
<https://www.theguardian.com/environment/2016/apr/17/boaty-mcboatface-wins-poll-to-name-polar-research-vessel>

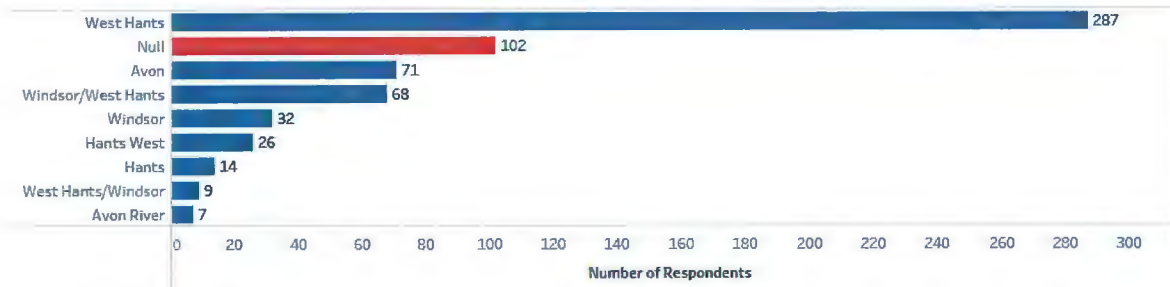


**Figure 10: The distributions of the new names suggested by the respondents. “Null” (the red bar) means the respondents did not suggest any name. We excluded names that have been suggested less than five times. The list of the names that were suggested fewer than five times could be found in Appendix B.**

**Windsor**



**West Hants**



**Elsewhere**



**Figure 11: The distributions of the new names suggested by the respondents per area. “Null” (the red bar) means the respondents did not suggest any name. We excluded names that have been suggested less than five times. The list of the names that were suggested fewer than five times could be found in Appendix B.**

## Appendix A: Full Charts for Primary and Secondary Tag

### First Questions: Primary Tags

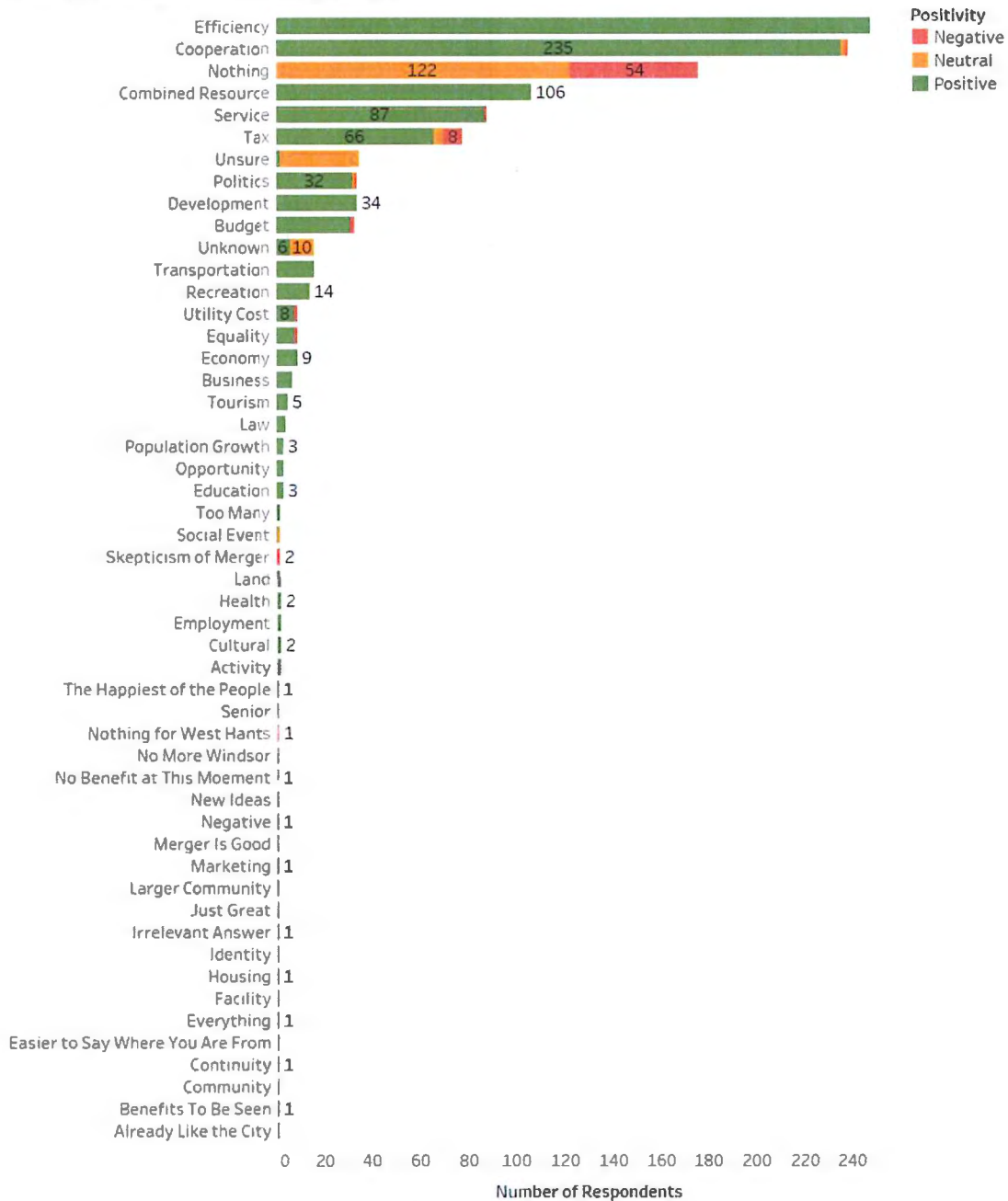


Figure 12: The charts represent the frequencies of the primary tags. Note that as the tags at the bottom are not as very useful. Some of them like “Already Like the City” do not provide any additional insight.

Access to Resource	1	Equality	1	No Benefit at This Moment	1	Unified Political Power	5
Access to Service	1	Facilities	1	No Benefit for Rural	1	Unified Political Voice	7
Advertisement	1	Fair Tax	4	No Change	1	Uninformed about Merger	1
Affordability	1	Fair Utility Cost	1	Not Informed Enough	1	Urban Growth	1
Affordable Transit	1	Financial Benefit	1	Nothing for West Hants	15	Utility Cost	1
Attracting Business	1	Financial Service	2	Null	692	Water Service	3
Better Activity	1	Fire	1	Opportunity for Growth	1	Water Service Cost	1
Better Budget	2	Fire Service	7	Optimal Use of Resource	1	Windsor Gets More Money	2
Better Business	1	Fishing	1	Overall Growth	9		
Better Communication	2	Focused on Everyone	1	Overall Streamlining	1		
Better Council	1	Funding for Three Mile Plains	1	Police Service	1		
Better Efficiency	2	Highway	1	Procurement	1		
Better Politicians	2	Hopefully Cost Saving	1	Public Transportation	1		
Better Service	8	Hopefully Reduced Tax	1	Recreation Program	1		
Better Spending	1	Improved Service	3	Reduced Fee	1		
Better Tax	2	Improved Service	1	Reduced Government	22		
Bigger Community	1	Increased Budget	5	Reduced Infigthing	1		
Bigger Tax Base	1	Increased Budget for Social Service	1	Reduced Property Tax	1		
Business Development	1	Increased Buying Power	1	Reduced Red Tape	3		
Bylaw	1	Increased Funding	1	Reduced Service	1		
Combined By-Law	1	Increased Infrastructure Budget	1	Reduced Staffing	3		
Combined Cost	1	Increased Resource	1	Reduced Tax	26		
Combined Funding	1	Increased Rural Budget	1	Reduced Utility Cost	1		
Combined Resource	1	Increased Service	3	Rink	1		
Combined Resource for Growth	1	Increased Tax	4	Rural Activities	1		
Combined Service	4	Increased Tax Revenue	1	Rural Senior Care	1		
Community Programs	1	Increased Utility Cost	1	School Districts	1		
Consistency	1	Industry	1	Service Improvement	1		
Coordination	1	Infrastructure	1	Servicing Windsor's Debt	2		
Corporate-friendly	1	Infrastructure	1	Sewer Service	1		
Cost Benefits	1	Job Creation	2	Skepticism against Merger	6		
Cost Saving	69	Land Use	1	Small Business	1		
Cost Sharing	6	Larger Council	1	Smaller Council	3		
Cost Sharing, Cost Sharing for Service	1	Larger Tax Base	3	Sport Facility	2		
Culture	1	Larger Tax Based	1	Streamlining	10		
Decision Making	17	Less Council	2	Streamlining Fire service	1		
Decreased Tax	1	Less Politicians	2	Streamlining Government	2		
Distribution of Funds	1	Main Benefit to Windsor	1	Streamlining Resource	2		
Distribution of Resource	2	Maintaining Service	1	Streamlining Service	40		
Downtown Development	1	Maintaining Tax	2	Stronger Chamber of Commerce	1		
Duplication of Service	1	Maintenance of Causeway Walking Trail	1	Summer Camp	1		
Easier Access to Service	1	More Housing Option	1	Tax	2		
Economic Development	6	More Land	1	Tax Reduction	2		
Economic Stability	2	More Marketable	1	The Crossing	1		
Economic Unity	1	More Service	2	Things Done Right	1		
Economy of Scale	3	More Staffing	1	Tourism	1		
Efficiency of Service	1	New Council	1	Transparency	2		
Elimination of Windsor CAO	1	Nice Area	1	Unfair Tax Distribution	2		
Elimination of Windsor Government	13	No Benefit	2	Unified Policies	1		

**Table 1: The charts represent the frequencies of the secondary tags with their frequencies. Since there are too many tags, we decided to present the data as a table instead.**

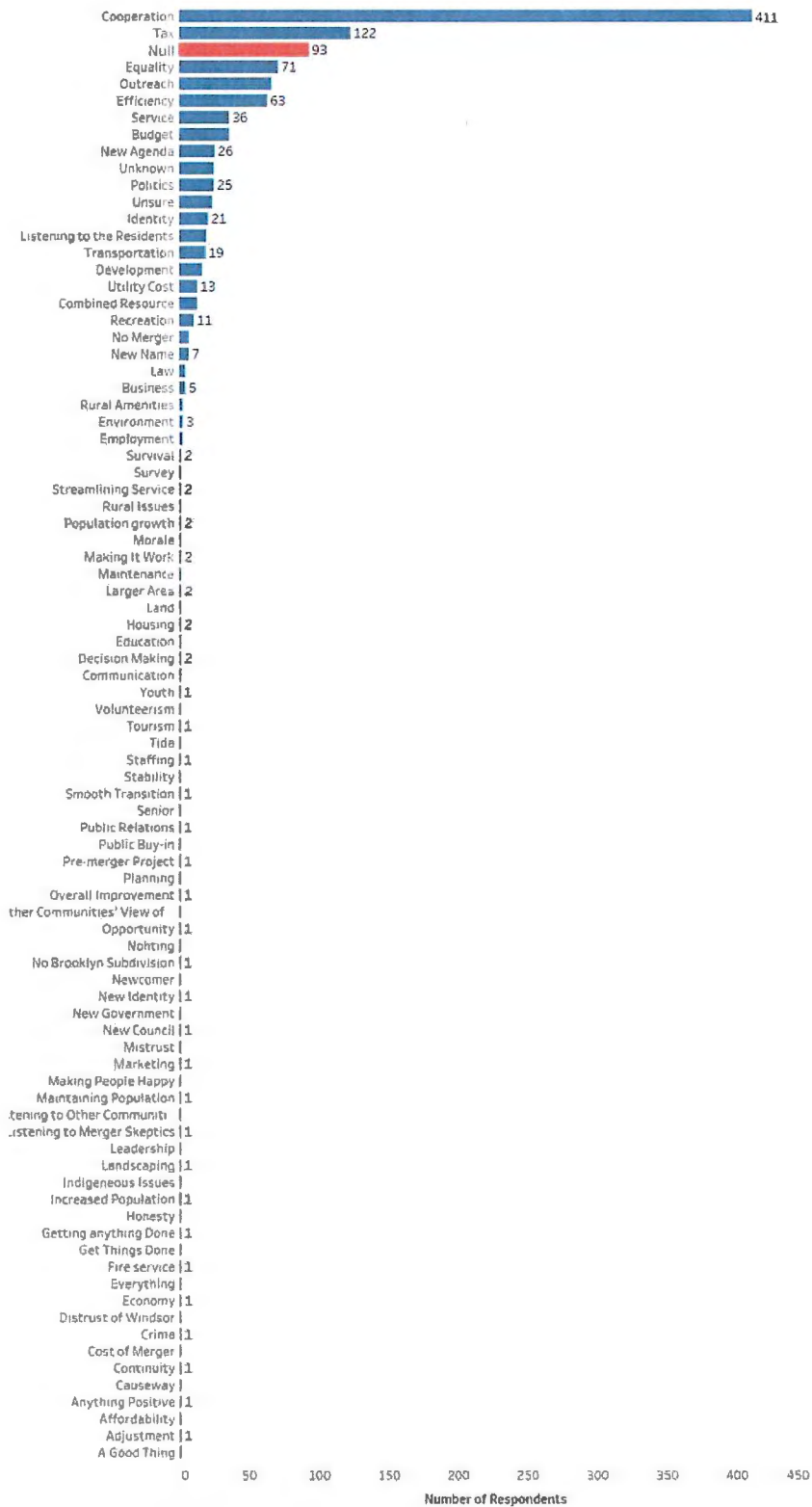


Figure 13: The full chart for the primary tags for the second questions.

Maintaining Tax	17	Bylaw	1	Less Politicians	1	Sewer Cost	1
Fair Tax	16	Bylaw Consolidation	1	Local Politics	1	Snow Removal	1
Reduced Tax	15	Change of Law	1	Mailing Residents	1	Snow Service	1
Streamlining Service	14	Cleaning up the Mess	1	Maintained Service	1	Something New	1
Increased Tax	12	Climate Change	1	Maintaining Staff	1	Sport Facility	1
Distribution of Resource	10	Cohesive Business Plan	1	Maintaining Staffing	1	Staff Organization	1
Streamlining	8	Combined Resource	1	Maintaining Tax for West Hants	1	Staffing	1
Better Politicians	7	Communicate Hantsport Improvement	1	Maintaining Utility Cost	1	Startup Cost	1
Cost Saving	7	Concern on Boundary	1	Misinformation	1	Stay on Budget	1
Better Road	5	Consistent Law	1	Missed Info	1	Streamlining Fire Service	1
Streamlining Government	5	Cost Growth	1	More Direct Democracy	1	Streamlining Service	1
The Crossing	5	Cost of Name Change	1	More People to Please	1	Streamlining Staff	1
Decision Making	4	Cost Sharing	1	New Budget	1	Streamlining Staffing	1
Overall Growth	4	Crime	1	New Jobs	1	Street Lights	1
Property Tax	4	Debt Sharing	1	New Tax Scheme	1	Summer Camp	1
Reduced Staffing	4	Developing the Most Efficient Infrastructure	1	No Benefits for West Hants	1	Tax Appropriate for Service	1
Rink	4	Distrust of Windsor Residents	1	No Cement Triangle	1	Tax Difference	1
Water Cost	4	Ditches	1	No Debt Sharing	1	Tax Not Just for Windsor	1
Better Staffing	3	Effective Spending for Windsor	1	No Dog Park	1	The People	1
Fire Service	3	Effective Use of Tax	1	No Input from Community	1	Traditional Council Debate	1
Affordable Tax	2	Efficient Communication	1	No Money for Unnecessary Things	1	Transition	1
Consistent Service	2	Efficient Government	1	No Windsor Debt Transfer	1	Transparency	1
Cost Control	2	Elimination of Corruption	1	No Windsor's Debt	1	Uninformed	1
Cost of Streamlining	2	Everyone Wants Their Own Way	1	Not Wasting Tax	1	Upset Tax Payer	1
Council	2	Expanded Service	1	Online Troll	1	Water Service	1
Debt	2	Expansion	1	Only Benefits for Windsor	1	Waterfront	1
Distribution of Fund	2	Expense Sharing	1	Paul Morton	1	West Hants Keeping Its Voice	1
Downtown Development	2	Fair Decision Making	1	Paying for Pre-merger Project	1	Windsor Shouldn't Upload Cost	1
Lower Tax in West Hants	2	Fair Distribution of Fund	1	People Don't Want to Lose Their Jobs	1	Windsor Taking Advantage	1
Maintaining Service	2	Fair Law	1	Please More People	1	Windsor Taking Advantage of West Hants	1
New Council	2	Fair Merger	1	Postal Service	1	Young Staff	1
Reduced Government	2	Fair Property Tax	1	Pot Holes	1		
Road	2	Fair Road Fixing	1	Preference for Wealthier Communities	1		
Rural Amenities	2	Fair Service	1	Redevelop the Textile Building	1		
Rural Internet	2	Fair Tax for West Hants	1	Redevelopment Vacant Lands into Parks	1		
Staff Reorganization	2	Fair Utility Cost	1	Reduced Fee	1		
Unified Political Voice	2	Fir Tax for West Hants	1	Reduced Staff Salary	1		
Addiction	1	Focused	1	Reduced Utility Cost	1		
Adequate Staffing	1	Handling Increased Budget	1	Reduced Volunteering	1		
Adult School	1	Hospital Exit	1	Representation	1		
Affordable Housing	1	Increased Land	1	Restraint on Spending	1		
Affordable Utility Cost	1	Increased Rural Cost	1	Rural Residents Used as Tax Base	1		
Allow Tide to Flow up Avon	1	Increased Utility Cost	1	Rural Service	1		
Attracting Business	1	Inform People of Area Rate	1	Rural Shopping	1		
Avoid Marginalization of Rural	1	Job Creation	1	Rural Support	1		
Balanced Budget	1	Keeping a Sense of Small Town	1	Same Challenge	1		
Better Planning	1	Keeping up with Growth	1	School Districts	1		
Better Service	1	Larger Tax Base	1	Server Error	1		
Budget for Transportation	1	Leadership	1	Service Equality	1		
Business Development	1	Leave Brooklyn Alone	1	Service Upgrade	1		

**Table 2: The lists of the secondary tags for the second questions and their frequency. We used a table format instead, because of the difficulty of creating a visualization.**

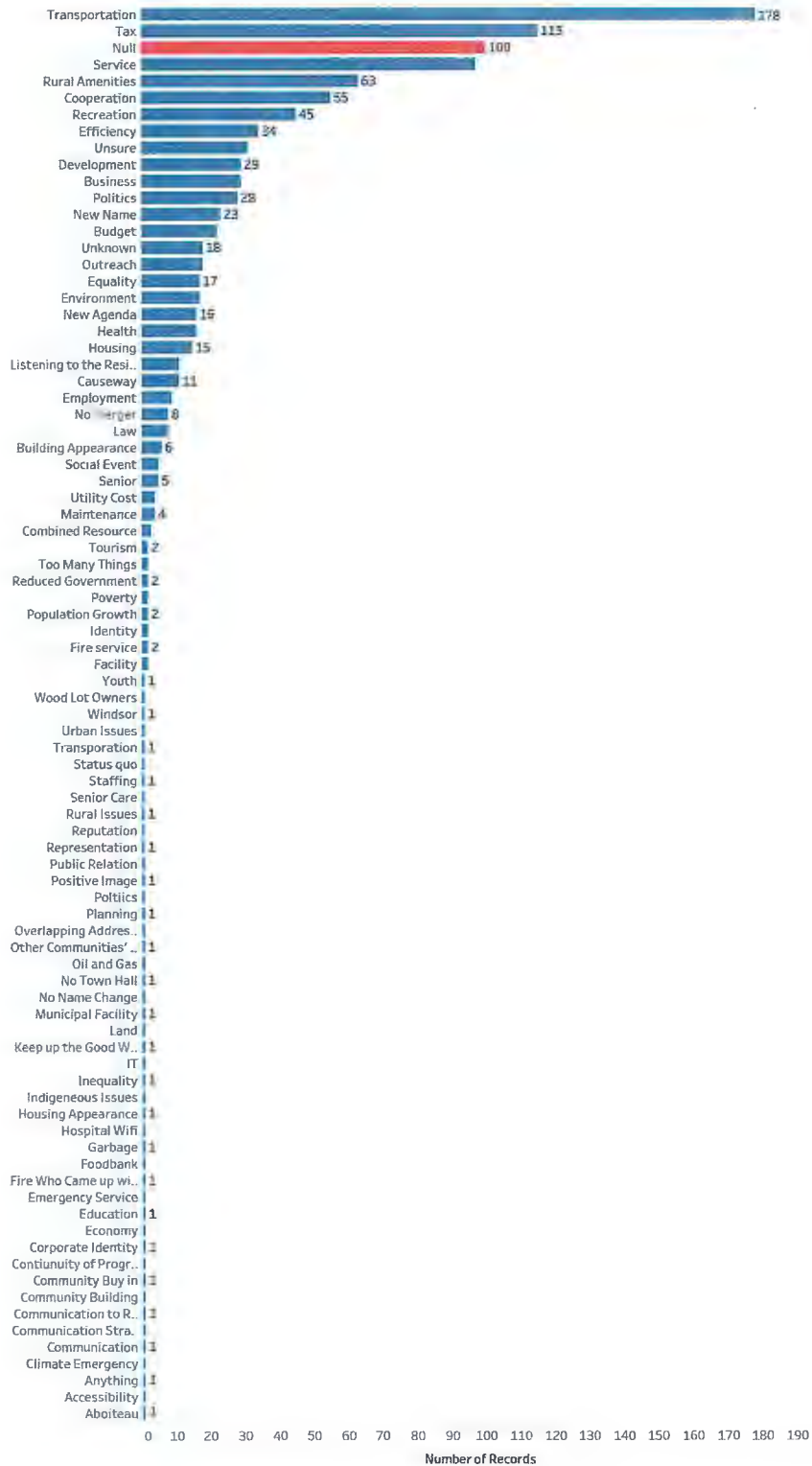


Figure 14: The full chart for the primary tags for the third question.

Accessibility	1	Bylaw Enforcement	2	Fire Hydrant	1	Loitering	1
Accessible Recreation	1	CAO Probation	1	Fire Service	58	Long-term Plan for Growth	1
Accountability	1	Change Management	1	Fire Station	1	Look for the Money Brooklyn Fire Station's ex-Chief Took	1
Active Living	1	Clean Water	1	Fiscal Prudence	1	Maintaining Road	1
Add Speedbump	1	Clearcutting	1	Fish Passage	1	Maintain Staffing	1
Add Walking Track to Rink	1	Climate Change	2	Fixing Dykes	1	Maintaining Road	1
Adequate Infrastructure Funding	1	Cole Drive Extension	1	Flooding	1	Maintaining Service	1
Adult Education	1	Combined Fire Service	1	Fork in Falmouth	1	Maintaining Tax	1
Affordable Business Rent	1	Community Centre	1	Future of Gypsum Mines	1	Maintaining Recreation	1
Affordable Housing	7	Competent Staff	1	Garbage Service	5	Medical Care	1
Affordable Tax	1	Concerns of Rushed Merger	1	General Rural Amenities	1	Mental Health	2
Affordable Utility Cost	2	Conflict of Interest	3	Getting Rid of Slum Areas of Windsor	1	Merger Party	1
Animal Keeping Law	1	Consistent Tax	1	Good Fire Service for Everyone	1	More Activities	1
Anti-smoking	1	Converting Rail to Trail	1	Green Bin Size	1	More Clinic	1
Attracting Business	19	Cost of Name Change	1	Growth Outside Windsor	1	More Extra-Curricular	1
Attracting Industry	1	Cost Saving	17	Gym	1	More General Rural Amenities	1
Autism	1	Debt	2	Gym for the Rink	1	More Public Facility	1
Bad Fire Service Decision	1	Decision Making	1	Highway	1	More Rainwater Ditch	1
Balanced Budget	1	Demolishing Buildings	1	Highway Doubling	1	More Recreation Facility	1
Best Staffic	1	Develop Grounds around Subway	1	Highway Twinning	2	More Rental	1
Better Emergency Response Time	1	Development of Industrial Park	1	Honesty	1	More Road Connection	1
Better Fire Coverage	9	Distribution of Cost	1	Hospital	1	More Senior Service	1
Better Fire Service	4	Distribution of Resource	1	Hospital Wifi	1	More Service	2
Better Fire Service Coverage	1	Doctor	4	Improved Service	1	More service based on tax	1
Better Housing for Low Income Family	1	Dog	1	Improving Public Image	1	More Shop	1
Better IT	1	Downtown Business	1	Increase Investment	1	More Staffing	1
Better Police	1	Downtown Development	2	Increased Tax	4	Naming People behind The Elected Official	1
Better Politicians	1	Downtown Parking	1	Indoor Pool	1	Natural Resource Development	1
Better recreation facility	1	Drugs	1	Industry	1	Nepotism	1
Better Road	18	Early Recall	1	Infrastructure	5	New Arena	2
Better Snow Plowing	1	Econom yof Scale	1	Information on New Structure	1	New Government	1
Better Staffing	1	Economic Development	6	Infrastructure	8	New House	1
Bike Lane	1	Ecotourism	1	Internet	2	New Municipal Building	1
Bike Route	1	Educating Politicians	1	Job Creation	6	New People	1
Bike Safety	1	Efficient Merger	1	Job Creation for Young Adults	1	New Recreation Facility	1
Bike Trail	3	Efficient Service	3	Job with Decent Rate of Pay	1	New Rink	3
Biking	1	Elimination of Border	1	Keeping Old Building Code	1	New Road	1
Boardwalk	1	Elimination of Fire Service	1	Lack of Business Opportunity	1	New Road Pavement	1
Border	1	Email the Residents on Merger Benefit	1	Lack of Service	1	New Tax Scheme	4
Bridge	1	Emergency Service	2	Lack of Support for Teens	1	No Debt Sharing	1
Budget Accountability	1	Environment	3	Lake	2	No Hockey Heritage on College Rd	1
Bulldoze Windsor Mall	1	Environmental Protection	1	Land Tax	1	No More Windsor Council	1
Bus to Windsor	1	Equality of Infrastructure Spending	1	Larger Tax Base	1	No Name Change	2
Business Developmeht	1	Equality of Service	1	Law Harmonization	1	No New Name	1
Business Development	6	ER Closure	1	Leadership	1	No New Tax for Rural	1
Business Growth	2	Evidence-Based Politics	1	Leave Brooklyn Alone	1	No Raise for Politicians	1
Business Promotion	1	Explanation of Tax	1	Limited Mobility	1	No Room to Expand	1
Business Stagnation in Windsor	1	Fair Tax	13	Line Painting	1	No Tax Increase	1
Business Tax	1	Fair Utility Cost	2	Loitering	1	No Tax Increase for Rural Area	1
Bylaw	7	Festival	1	Local Business	1	No Tax Increase in West Hants	1

**Table 3: The lists of the secondary tags for the third questions and their frequencies (Part I). We used a table format instead, because of the difficulty of creating a visualization.**

Not Allowing a Few to Keep the Town from Prosperity	1	Road Emergency Service	1	Teen Activities	1
Old Council	1	Road in Windsor	1	Teleconferencing	1
Opening up the Water Passage	1	Road Maintenance	1	The Crossing	47
Optimal use of resource	1	Road Safety	1	Theft	1
Outdoor Gym	1	Route 14	1	Tongue Road	1
Outfitting fire service	1	Rural Amenities	1	Townhall on Merger	1
Overall Growth	11	Rural Cable	1	Traffic	1
Permanent Road Fix	1	Rural Cell Service	1	Traffic Bottlenecks	1
Pisiquid Trail	1	Rural Healthcare	1	Traffic Light	1
Police Service	4	Rural Hospital	1	Traffic Light at Wentworth and Payzant	1
Politicians	1	Rural Internet	62	Trail	2
Politicians Buying Land	1	Rural Road	1	Transparency	6
Politicians Not Buying Property	1	Safe Housing	2	Treat Agricultural Lands as Such	1
Politics for Everyone	1	Safe Neighbourhood	1	Trucks on Forestry Road	1
Pollution	1	Saving Business	1	Unified Political Voice	1
Pot Holes	5	Senior discount	1	Unsafe Drivers	1
Preserving Town Traditions	1	Senior Housing	3	Upgrade Fire Equipment	1
Prevent House from Sinking	1	Senior Pension	1	Upgrading Infrastructure	1
Prevent Urban Policy on Rural Area	1	Service Delivery	1	Utility Cost	1
Prevent Urban Policy on Rural Areas	1	Service Equality	1	Vacant Properties	1
Privatization	1	Sewer Service	10	Vandalism	1
Property Tax	11	Sewer Service on Wentworth Rd	2	Volunteer Fire Fighter	1
Proportional Electoral System	1	Shared Health Service	1	Wage increases	1
Protect Agricultural Area from Urbanization	1	Shared Recreation	1	Waste Service	1
Protective Service	1	Shopping Incentive	1	Water clean up	1
Public Consultation	1	Should not Have Two Arenas	1	Water Cost	3
Public Transportation	7	Sidewalk	11	Water Issues	1
Rail to Trail	2	Small Business Aid	1	Water Quality	1
Recreation Areas	1	Smaller Council	1	Water Rate	1
Recreation for Children	2	Smooth Transition	1	Water Service	9
Recreation for Youth	1	Snow Service	3	Water Sevice	1
Recreation Opportunities	1	Soccer Stadium	1	Waterfront	2
Reduce Staffing	1	Social Event	1	Waterfront Development	1
Reduced Property Tax	1	Social Events	1	Weekend and Evening Activities	1
Reduced Red Tape	1	Splash Pad	1	Wentworth Drive	1
Reduced Staffing	1	Sport Facility	4	Wentworth Road	1
Reduced Tax	20	Stoplight at Empire Lane and Payzant Drive	1	Windsor Fire Service not Releasing Financial Statement	1
Reduced Tax for People outside Windsor	1	Store Closure	1	Windsor Tax	3
Reduced Urban Tax	1	Streamlined Budget	1	Windsor's Reputation	1
Reduced Utility Cost	1	Streamling Government	2	Year-Round Recreation	1
Reinstalling Dyke	1	Streamlining	8	Youth Activities	1
Removing Causeway	1	Street Parking	1	Youth Program	1
Representation	2	Summer Camp	1		
Restoring Avon River	1	Support Staff	1		
Revert Andy McDade's Decision	1	Sustainability	4		
Revert Name to Sam Slick	1	Sustainable Business	1		
Review Planning Strategy	1	Taking Care of Local Affairs	1		
Rink	4	Tax	3		
Road	55	Tax Clarity	1		
Road Connection	2	Tax Rumours	1		

Table 4: The lists of the secondary tags for the third questions and their frequencies (Part II).

## Appendix B: List of New Names Suggested Less Than Five Times

Windsor	Frequency	West Hants	Frequency	Outside of the Region	Frequency
Allenville	1	Acadia on the Avon	1	Avon River	3
Avon River	3	Avalon	1	Avondale	1
Avon Valley	3	Avon District of Windsor West Hants	1	Camolot	1
Avondale	1	Avon Valley	2	Chrystal	1

Avonview	2	Avon West Hants	1	Eastern Valley	1
Best Hants	1	Avonside	2	Flood Cap	1
Greater Windsor	1	Better Together	1	Freedom	1
Greater Windsor/West Hants	1	Birthplace of Hockey	1	Hants	3
Hampshire	1	Chaos	1	Hants Windsor	1
Hants Avon	1	Chrystal Town	1	Hantsor	1
Hants County Recreation	1	Falmouth	1	Hantsport	1
Hants Southwest	1	Fort Edward	1	Hindsor	1
Happyville	1	Fundy	1	Mismanaged Town Stealing West Hants's Residents Money	1
New Windsor	1	Future	1	New West Hants	1
Partners for Change	1	Gateway	1	Rising	1
Pisiquid*	4	Greater Falmouth	1	Tidal Waters	1
Terra Avonia	1	Hants County	1	West Hants Windsor	1
Tidal River	1	Hants Tri	1	West Hants/Windsor	3
West Windsor	1	Hants Valley	1	West Windsor	2
Windsor West	1	Hants Windsor	3	Windsor Hants	2
WinWest	1	Hants/Windsor	1	Windsor West	2
		Hantsor	1	Windsthan	1
		Hell on Earth	1	Ww	1
		Key West	1		
		Larger Community of Choice	1		
		Manchester	1		
		Newport	1		
		Pisiquid*	1		
		Pockets	1		
		RH Lowthers	1		
		Rising Tides	2		
		Shit on Stick	1		
		Something Aboriginal**	1		
		Stick to West	1		
		Three Rivers	1		
		Tidal Bay	1		
		Tidal Flow	1		
		Troyville	1		
		Urban Hants Windsor	1		
		Valley Gateway	1		
		Washmyhants	1		
		Water	1		
		Welfare	1		
		West Hants Avon	2		
		West Hants United	1		
		West Wind	1		
		Westwind	1		
		Windsor Hants	4		
		Windsor Junction	1		
		Windsor Plains	1		
		Windsor West Hants Hantsport	1		
		Windsor-Hants West	1		

		Windsor-Hantsport- West Hants	1		
		Windsor/Hants	2		
		Windy Hants	1		
		Winwest	1		
		Worth a Try	1		
		Wural	1		
		WWH***	1		

\* Not all respondents provided the name "Pisiquid." Some provided variant spellings such as "Pezaquid." We treated the variants as the same name.

\*\* The respondent indicated that the new name should be aboriginal. However, they did not indicate any specific name.

\*\*\* The respondent insisted that WWH is not an abbreviation. It should be the actual name.

**Table 5: The list of all proposed names and their frequencies.**