Cape Breton Regional Municipality
Viability Study Steering Committee

AGENDA

Monday, December 3, 2018
1:30 p.m.

Council Chambers
2nd Floor, City Hall
320 Esplanade, Sydney, N. S.

Committee Members:
Councillor Darren Bruckschwaiger, Chair
Councillor Earlene MacMullin
Councillor Eldon MacDonald
Councillor Ray Paruch
Councillor George MacDonald
Citizen Carmen Dunn
Citizen Nicole LaFosse
Marie Walsh, Chief Administrative Officer
Jennifer Campbell, Chief Financial Officer
John MacKinnon, Director of Technology, Vice Chair
Ron Dauphinee, Department of Municipal Affairs
Emily Pond, Department of Municipal Affairs
Cape Breton Regional Municipality

Viability Study Committee

Monday, December 3, 2018
1:30 p.m.

Council Chambers – City Hall

AGENDA

Roll Call

1. Approval of Minutes: September 20, 2018 (previously distributed)

2. Approval of the Agenda (motion required)

3. Notice of Resignation – Citizen Appointee Nicole LaFosse: Deborah Campbell Ryan, Municipal Clerk (See page __3__)

4. Request for Proposals - CBRM Viability Study: Jennifer Campbell, Chief Financial Officer (See page __7__)

Adjournment
To: Viability Study Steering Committee
From: Deborah Campbell Ryan, Municipal Clerk
Date: November 28, 2018
Subject: Notice of Resignation – Citizen Appointee Nicole LaFosse

On November 14, 2018, the Clerk’s office received written notification from Citizen Appointee Nicole LaFosse advising of her resignation from the CBRM Viability Study Steering Committee.

The options available to the Committee include:

1. Request the Clerk’s Department to call for expressions of interest to fill the vacancy, noting that the applications would have to be vetted through the Nominating Committee and approved by Council; or

2. Leave the position vacant.

As indicated in the attached Terms of Reference, it is anticipated that the mandate of the Viability Study Steering Committee will be completed by March 31, 2019. Further, a quorum can be achieved with the vacancy.

If the Committee decides chooses option 1, it will delay the process by approximately two months.

Yours truly,

Original signed by:

______________________________
Deborah Campbell Ryan, Municipal Clerk

Attachment
Terms of Reference

Official Name

The Committee shall be known as the CBRM Viability Study Steering Committee.

Background

The Cape Breton Regional Municipality (CBRM) was amalgamated in 1995 by way of a special act of the legislature. At the time, the eight municipalities located in Cape Breton County (Louisbourg, Dominion, New Waterford, Glace Bay, Sydney, Sydney Mines, North Sydney and The Municipality of the County of Sydney) were merged into a single unit. Prior to amalgamation, several of the individual municipalities had struggled financially for several years. In addition, in the lead up to amalgamation, a number of the municipalities made the decision to invest heavily in infrastructure, which led to the new amalgamated CBRM inheriting a high level of debt.

Twenty-three years later, the CBRM is facing several real challenges and municipal representatives have been asking for a viability study in recent years. The Provincial Municipal Fiscal Review also included a recommendation (Recommendation 17) to conduct a joint viability review of the municipality. It is proposed that a performance audit and an evidence-based review of the strengths, weaknesses, and limitations of the CBRM’s tax base and tax rate structure be conducted. In January 2018, the Department of Municipal Affairs provided $224,000 for the purposes of rejoining the REN Program, and completing a viability study, among several other initiatives.

The CBRM is experiencing a population decline at a rate of roughly 1% per year – a trend that has been occurring for at least a generation. As well, compared the Provincial average, the residents of the CBRM have lower average household incomes, participate less in the workforce, and face a higher rate of unemployment. They are also facing significant infrastructure challenges, as they manage a municipality that was originally built to meet the needs of a larger population, and at the same time, must make significant investments in new wastewater collection and treatment infrastructure to meet environmental regulations by 2040. Furthermore, the Capped Assessment Program (CAP) is responsible for distortions of the CBRM’s assessment base; shifting tax burdens, limiting the overall strength of the base, and tying growth largely to the Consumer Price Index.

According to common financial metrics used by the Province to assess the health of municipalities, the CBRM has above average assessment base growth and they appear to have limited tax effort.

Objectives and Deliverables

The objective of this work is to oversee the development of a comprehensive and authoritative shared body of information from which decisions can be made about how to improve the overall viability of the CBRM’s circumstances in order to provide essential municipal services of reasonable quality at a reasonably comparable tax burden and effort.

The deliverable shall be a comprehensive report that:

- Describes the current state of the tax base, tax rate structure, tax burden and tax effort of the CBRM, at a service level, where possible.
- Describes, with context, the other sources of revenue the CBRM collects and has access to.
- Provides a value-for-money assessment of the CBRM’s budget expenditures along departmental and project/functional lines.
- Explores the degree to which the CBRM has consolidated and coordinated its operating, program and infrastructure expenditures, given its status as a regional municipality.
- Describes, with appropriate context, of how the CBRM is positioned relative to comparable municipalities, along measures of tax base, commercial vs residential assessment, tax burden and tax effort, budget expenditures, and infrastructure deficit. This work should consider the impact of the CAP.
- Provide recommendations for potential changes to the tax structure, budget items, budgeting approach, municipal programs, operations, or governance necessary to improve the viability of the CBRM over the medium to long term. These recommendations should be informed both by jurisdictional work, value-for-money audit results, and financial/demographic modeling and information. After considering the impact of any recommendations put forward, commentary should be provided on the specific challenges facing the municipality as well as the state of the finances and the overall viability of the CBRM as an organization. There should also be a specific focus on whether the CBRM has access to adequate revenue to provide a reasonable level of quality services at a reasonable tax burden and effort for its residents.

**Members/Composition**

The Committee shall consist of:

- 2 Provincial representatives from the Department of Municipal Affairs;
- 5 Councillors from the CBRM Council;
- 3 CBRM staff representatives; and
- At least 2 representatives from the public at large

**Note:** From time to time the Committee may invite subject experts and specialized resources to aid the committee in meeting its mandate. Persons other than Committee members may, with permission of the Committee, attend any meeting for the purpose of providing information, making a submission or providing feedback. Such persons may, with the permission of the Chair, speak on an issue but are not involved in the decision process.

**Reporting Structure**

A Project Steering Committee comprised of members of the Department of Municipal Affairs, the CBRM Council and staff, and members of the public, shall oversee the project. The Committee shall appoint a “Project Manager” as the primary liaison/contact with the successful proponent.

The successful proponent will assemble a “Project Team” for this assignment and appoint a “Project Lead” who will liaise with and report to the Steering Committee through its Project Manager and/or the Steering Committee, as appropriate.

**Term of Membership**

1. This is an ad hoc committee; once the work is completed the term of office expires.
2. The term of the work is anticipated to be complete by March 31, 2018.

Meetings

Every attempt will be made to schedule meetings at least 10 days in advance, meetings shall be as required.

A face-to-face meeting can be cancelled by the meeting Chair if:

- All issues on the agenda can be addressed by phone, fax, or e-mail consultations.
- The meeting is purely for information sharing with no consensus building or decision-making necessary and the same result can be achieved by sending e-mails to everyone.
- The majority, especially provincial and public representatives, are not available for the meeting.
- Bad weather or other unforeseen circumstances

Attendance

If committee members are unable to attend, they must notify the CBRM office.

A member of the Committee, who without leave of the Committee, is absent for three consecutive regular meetings of the Committee may be requested by the Committee to vacate his/her position.

Quorum

A Quorum shall be 50 percent of Committee members with 1 Provincial representative and 1 member of the Public.

Decision Making

The members of the Committee shall make every effort to come to consensus during the decision-making process. The Committee will use consensus decision making to facilitate better decisions through:

- including the input of all Committee members;
- including and respecting all parties, and generating as much agreement as possible;
- setting the stage for greater cooperation in implementing the resulting decisions;
- promoting atmosphere that fosters group cohesion and interpersonal connection.

When the Committee members cannot reach an agreement, the Committee may have a motion put forth which requires a vote to be taken. Provincial representative support will be required for a vote to pass.
Tender Details

Tender ID: CBRM_P20-2018

Title: CBRM_P20-2018 CBRM VIABILITY STUDY

Tender Docs Location: To access tender documents see below.


Department / Agency Name: Cape Breton Regional Municipality

Closing: Closing on November-23-18 at 03:00 PM Atlantic Time.

Location: 320 Esplanade, Sydney, NS B1P 7B9, Suite 102

Opening: Opening on November-23-18 at 03:00 PM Atlantic Time.

Location: same as close location

Posted: 23 October 2018

Trade Agreement: Atlantic Procurement Agreement (APA)

Category: Goods: N  Services: Y  Construction: N

Pickup Fee: 

Addendum Notes: Addendum #1 - Issued November 6, 2018 at 10:45am

Contact: 320 Esplanade, Sydney, NS B1P 7B9, Suite 102
Phone: 902-563-5015
Email: purchase@cbrm.ns.ca

Memorandum

Price-based totals are recorded as received at the time of closing. Pricing is subject to review by staff of Procurement for mathematical accuracy. Procurement reserves the right to update totals based on this evaluation and as such the final ranking of vendors may be subject to change.

Note: Adobe Reader is required (http://get.adobe.com/uk/reader/) to properly open and view all documents embedded within the PDF. For best results, Right-Click the "Download PDF" link and select "Save As" or "Save Target As". Please read this support page if you encounter display issues within your web browser (http://helpx.adobe.com/acrobat/using/display-pdf-browser-acrobat-xi.html)


28/11/2018
REQUEST FOR PROPOSAL

CBRM_P20-2018

CBRM VIABILITY STUDY
Closing: THURSDAY, NOVEMBER 29, 2018 at 3:00 pm local time

Cape Breton Regional Municipality
Procurement Section
Suite 102, 1st Floor
320 Esplanade
Sydney, NS B1P 7B9
CHECK LIST

PRIOR TO SUBMISSION PLEASE CHECK THAT YOU HAVE SUBMITTED A COPY OF THE FOLLOWING DOCUMENTS

☐ SCHEDULE “A” – MUNICIPAL BY-LAW COMPLIANCE CERTIFICATE

☐ SCHEDULE “B” – TRADE AGREEMENTS ACKNOWLEDGEMENT

☐ TRIPlicate (3) COPIES OF SUBMISSION IN A SEALED ENVELOPE PROPERLY LABELED WITH CORRECT NUMBER CBRM_P20-2018

☐ RECEIVED ADDENDA NO. _____ TO NO.____ INCLUSIVE WERE CAREFULLY EXAMINED

__________________________
DATED THIS ______ Day of ____________________, 2018.

__________________________
COMPANY NAME:

__________________________
ADDRESS:

__________________________
CITY/ PROVINCE: __________ POSTAL CODE: __________

__________________________
PHONE NO.: __________ FAX NO.: __________

__________________________
EMAIL ADDRESS:

__________________________
WEBSITE:

__________________________
CONTACT NAME (please print):

__________________________
TITLE (please print): __________ PHONE NO.: __________

THE FOLLOWING INFORMATION MUST BE COMPLETED TO ENSURE ACCEPTANCE. FAILURE TO COMPLY WITH ABOVE MAY RESULT IN DISQUALIFICATION OF YOUR BID.
INSTRUCTIONS TO BIDDERS

REQUEST FOR PROPOSAL
CBRM VIABILITY STUDY

Closing: Submit to the undersigned up to 3:00 P.M., Thursday, November 29, 2018, the bid must be returned in a sealed envelope in TRIPlicate (3) COPIES and must clearly designate CBRM_P20-2018 to the Procurement Section, Financial Services Suite 102, 320 Esplanade, Sydney, N. S. B1P 7B9.

NOTE: FAXED / ELECTRONIC submissions are NOT acceptable and will not be considered

Questions & Clarifications: Any clarification required by a proponent must be requested in writing to the responsible Buyer indicated in the Solicitation. Such requests must be provided in due time before the closing date in order to allow proper consideration and a reply. The response to a request for clarifications submitted by any Proponent will be posted on the Nova Scotia Government Website as an Addendum.

Withdrawal or Modification of Bid: Proponents may withdraw, replace or modify their bid up until the specified closing time, provided that this is done in writing. Any modification or replacement of a bid must be done in the same format as defined in the Solicitation. NOTE: FAXED / ELECTRONIC modifications are acceptable

Addenda: All addenda must be acknowledged in bid submission; proponents must monitor the Nova Scotia Government Tenders Website for any addenda that may be issued. CBRM staff no longer maintains plan takers lists, and no longer have knowledge of who has downloaded opportunities. http://www.novascotia.ca/tenders/tenders/ns-tenders.aspx

Opening: Public opening will occur immediately following the time of closing in the first floor boardroom of the Civic Centre, 320 Esplanade, Sydney, N. S. The determining clock for authentication of date and time is the computer (network time), located in the Procurement Office, Suite 102.

Tenders requiring bid deposit: If a tender requires a non-refundable bid deposit only those companies who have complied with this request will be considered for acceptance.

TENDER CONTENTS:
(Section Applies to: Construction Contracts, Services & Sale of Municipal Property ONLY!)

Bid Security: Each tender must be accompanied by a certified cheque payable to the Cape Breton Regional Municipality or a Bid Bond on CCDC Form 220 for ten (10) percent of the tendered sum. Any withdrawal of the successful tender shall constitute forfeiture of the bid deposit.

Performance Security: A Performance Bond in the amount of fifty (50) percent contract price and Labour and Material Payment Bond in the amount of fifty (50) percent of the contract price will be required upon notification of award and before the signing date of the contract or issue of the Purchase Order.

Alternate Securities Acceptable: As an alternate to the Security Deposit and the Consent of Surety requirements stated herein, Contractors may submit a ten (10) percent bid security certified cheque, and subsequently upon notification of award, an additional ten (10) percent contract security certified cheque, in lieu of contract stated bonding.
Accompanying Documents: All bids must include the following documents:
- “Check List” Completed in full /Signed /Dated(Including acknowledgement of addenda)
- The signed Schedule “A” Municipal By-Law Compliance form attached to the tender documents.
- A letter of Good Standing/Clearance from the Workers’ Compensation Board of Nova Scotia
- Completed/signed Appendix “A” Consultant, Contractor, Supplier Health & Safety Questionnaire.
- General liability insurance.

Prior to Contract Award – In accordance with section nine (9) of the CBRM Procurement Policy, the successful tenderer may be required to provide an approved Commercial Property Zoning Confirmation, issued by CBRM’s Development Officer, prior to award of contract.

Following completion of the tendered work, letters of clearance from both organizations, dated no earlier than the final day worked on the project, must be submitted with the final invoice for the project. This will form a condition of the tender in addition to any other conditions within the contract documents and specifications.

Policy:

- Canadian Free Trade Agreement (CFTA), Atlantic Procurement Agreement (APA) and The Cape Breton Regional Municipality Procurement Policy are the governing documents used for all tenders. Copies of these documents are available from the Financial Services Department, Procurement Section, Suite 102, 320 Esplanade Sydney, N.S. or by phoning (902) 563-5015

- Where identical goods and/or services are available, from a Cape Breton Regional Supplier, and a supplier from outside the regional area, the following shall apply:
  - Regional suppliers qualify for the 5% price preference if they are a commercial or residential taxpayer registered with the Registry of Joint Stocks of Nova Scotia whose primary business address is within the district boundaries of the Cape Breton Regional Municipality and the assessed property is the registered business address of the bidder.
  - Due to restrictions imposed by the Atlantic Procurement Agreement on the MASH sector within the Province of Nova Scotia, local Bidder Preference may only be applied on goods, services, and construction whose price does not exceed the following thresholds: $25,000 on Goods, $50,000 Services and $100,000 on Construction.

- Successful bidder will be required to follow CBRM protocol as designated by Purchasing Department for delivery and invoicing.

- Payment: Any supplier having an account due to the Cape Breton Regional Municipality, which is in arrears, will have such arrears deducted from payments being made to the supplier.

The Cape Breton Regional Municipality reserves the right to reject any or all tenders or to accept any tender or part thereof considered to be in its best interest.

Daniel C. Colbourne
Daniel C. Colbourne, Buyer
Financial Services
SCHEDULE “A”

MUNICIPAL BY-LAW COMPLIANCE CERTIFICATE

This document forms part of and is incorporated in to the Tender. Bidders convicted of violations of any Cape Breton Regional Municipal By-Laws or found in contravention of the Dangerous and Unsightly Provision of the Municipal Government Act, S.N.S. 1998, c. 18 shall be precluded from bidding on the tender. Successful bidders who subsequently are found guilty of violation of any Cape Breton Regional Municipal By-Laws or are found to have contravened the Dangerous and Unsightly Provision of the Municipal Government Act S.N.S. 1998, c. 18 shall have the tenders revoked and shall be precluded from bidding on subsequent tenders for a period of thirty-six months.

__________________________________________________________
(hereinafter referred to as “The Bidder”) does hereby certify that the Bidder has not been found guilty of violation of any Cape Breton Regional Municipal By-Laws and has not been found to have contravened the Dangerous and Unsightly Provision of the Municipal Government Act S.N.S. 1998, c. 18 and furthermore hereby agrees to comply with all Cape Breton Regional Municipal By-Laws and the Dangerous and Unsightly provision of the Municipal Government Act, S.N.S. 1998, c. 18. The Bidder understands and agrees that any finding of guilt or contravention of any Cape Breton Regional Municipal By-Laws and provisions will result in the Tender being revoked and the Bidder being precluded from bidding on any subsequent Tender for a period of thirty-six months.

Witness

Bidder

CBRM INTERNAL USE ONLY

Approved by: ________________________________
Title: ________________________________
Date: ________________________________
SCHEDULE "B"

TRADE AGREEMENTS ACKNOWLEDGEMENT

All Public Sector Entities in Nova Scotia have trade agreement obligations under the Public Procurement Act. Trade agreements play a vital role in our economy. They create market access for our goods and services by reducing barriers to, among others things, labour mobility, investments, energy, agriculture, and government procurement. Agreements can be comprehensive, covering a number of different issues, or more concentrated, covering individual issues. Each agreement has unique language, exemptions, rules, and requirements.

Municipalities, Academic Institutions, School Boards, Health Authorities (MASH) and Crown Corporations that have their own procurement groups and policies must ensure they are consistent with the principles of the Province of Nova Scotia Procurement Policy, and the obligations of the Public Procurement Act.

Trade Agreements that impact government procurement in Nova Scotia include the Canadian Free Trade Agreement and the Atlantic Procurement Agreement (APA). The CFTA includes all provinces, Northwest Territories, Yukon, and the Federal Government as well as their respective MASH sectors and Crown Corporations.

The APA is an agreement among Nova Scotia, New Brunswick, Prince Edward Island, and Newfoundland and Labrador and their respective MASH sectors and Crown Corporations. The key to being compliant with multiple trade agreements is to ensure you are meeting the obligations of the one with the lowest thresholds, which in this case is the APA. Table A outlines the thresholds for these two agreements.

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<tr>
<th>Agreement</th>
<th>Coverage</th>
<th>MASH</th>
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<tr>
<td>Atlantic Procurement Agreement (APA)</td>
<td>Equal access to Atlantic suppliers. Includes NS, NB, PEI, &amp; NFLD, their respective MASH and Crowns</td>
<td>Goods: $25K+ services: $50K+ construction: $100K+</td>
</tr>
<tr>
<td>Canadian Free Trade Agreement</td>
<td>Equal access to Canadian suppliers. Includes all CDN Provinces, NWT, YUK, their respective MASH and Crowns, and the Federal Government</td>
<td>Goods: $400K+ services: $100K+ construction: $250K+</td>
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__________________________ (hereinafter referred to as "The Bidder") does hereby acknowledges the understanding that this tender falls under the Domestic Trade Agreements, Atlantic Procurement Agreement (APA) and Agreement on Internal Trade. As part of these agreements and under the Nova Scotia Public Procurement Act, CBRM is included as part of the MASH Sector. This document forms part of and is incorporated into the Tender.

Witness ___________________________ Bidder ___________________________
# PROPOSAL PRICING

<table>
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<tr>
<th>TENDER #</th>
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## CBRM VIABILITY STUDY

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Company: ____________________________________________________

Authorized Signature: ________________________________________
Request for Proposal – CBRM Tax Study

Overview

A Joint committee of the Cape Breton Regional Municipality and the Department of Municipal Affairs – The CBRM Viability Study Steering Committee – are seeking a consultant to conduct a viability study of the CBRM. The objective is to provide context to ongoing discussions on the state of the CBRM’s fiscal capacity, fiscal potential, the efficiency and effectiveness of core services of the municipality, and the overall viability of the Municipality. The project proponents are looking for a detailed assessment of the financial state of affairs in the CBRM, a value-for-money audit of the CBRM’s operations, a revenue and cost comparison to comparable municipalities elsewhere, and a determination of what changes might be necessary to improve the overall viability of the CBRM’s circumstances in order to provide essential municipal services of reasonable quality at a reasonably comparable tax burden and effort.

Scope of Work

The scope of work will include:

- An exploration of the strength of the CBRM property tax base by type of property and service levels – as defined by the current tax rate structure. This work should explore assessment trends over the past 10 years and the drivers of growth or decline. The work will further explore the tax levy derived from the property tax base in the CBRM, on a service level, with a focus on tax burden and tax effort (taking into consideration the impact of the Provincial and municipal low-income tax rebate programs).
- A value-for-money assessment of the CBRM’s budget expenditures along departmental and project/functional lines.
- Explores of the degree to which the CBRM has consolidated and coordinated its operating, program and infrastructure expenditures, given its status as a regional municipality.
- An analysis of the tax rate system used in the CBRM. There are many area rates that are used in different communities reflecting different service levels across the region. An exploration of the source of the different rates and a rationalization of the rate structure should be conducted. This work should be conducted considering the impact of the Capped Assessment Program (CAP) and an exploration of how it might look in the absence of the CAP.
- A jurisdictional scan looking at municipalities of similar size or composition to that of the CBRM. This exploration will include – to the greatest extent possible – an exploration of tax base strength including the ratio of commercial to residential assessment, tax burden and effort, and grants from other levels of government. It will be important to differentiate how the responsibilities of municipalities in different provinces differ from those in Nova Scotia when considering the role that grants play in municipal budgets.
- Ten and 20 year projections along various demographic and financial measures assuming, at a minimum, the CBRM pursues a status quo approach, faces an acceleration in the rate of population decline, or modestly reverses the trend of population decline. Considering the outcomes of the projections, the proponents will then engage in a back-casting exercise to explore the decisions and circumstances that may lead to these possible outcomes.
- An exploration of the CBRM’s competitive advantages.
- An estimation of the infrastructure deficit facing the CBRM, including the cost of necessary infrastructure that does not yet exist (i.e. the wastewater infrastructure necessary to meet CCME regulatory requirements).

A package of all data, models and jurisdictional work used to complete the report, including appropriate explanatory materials or training (as necessary) to ensure reasonable knowledge and capability transfer to CBRM/DMA staff will also be required.

Reporting Structure

A Project Steering Committee comprised of members of the Department of Municipal Affairs, the CBRM Council and staff, and members of the public, shall oversee the project. The Committee shall appoint a “Project Manager” as the primary liaison/contact with the successful proponent.

The successful proponent will assemble a “Project Team” for this assignment and appoint a “Project Lead” who will liaise with and report to the Steering Committee through its Project Manager and/or the Steering Committee, as appropriate.

Deliverables and Timeline

The key deliverables that result from this project shall be a report:

- A Description of the current state of the tax base, tax rate structure, tax burden and tax effort of the CBRM, based on service levels, where possible.
- A value-for-money assessment of the CBRM’s budget expenditures along departmental and project/functional lines.
- A description, with appropriate context, of how the CBRM is positioned relative to comparable municipalities, along measures of tax base, commercial vs residential assessment, tax burden and tax effort, budget expenditures, and infrastructure deficit.
- A description of the degree to which the CBRM has consolidated and coordinated its operating, program and infrastructure expenditures, given its status as a regional municipality.
- Provide recommendations for potential changes to the tax structure, budget items, budgeting approach, municipal programs, operations, or governance necessary to improve the viability of the CBRM over the medium to long term. These recommendations should be informed both by jurisdictional work, value-for-money audit results, and financial/demographic modeling and information. After considering the impact of any recommendations put forward, commentary should be provided on the specific challenges facing the municipality as well as the state of the finances and the overall viability of the CBRM as an organization. There should also be a specific focus on whether the CBRM has access to adequate revenue to provide a reasonable level of quality services at a reasonable tax burden and effort for its residents.
- A package of all data, models and jurisdictional work used to complete the report, including appropriate explanatory materials or training (as necessary) to ensure reasonable knowledge and capability transfer to CBRM/DMA staff.

Timeline

Timeline proposal:

December 3, 2018 (or earlier) – Contract awarded to selected proponent
Week of December 3rd, Project Manager and Project Team meet to discuss priority areas, formalize reporting procedures and share available information.

Regular updates will be provided by the Project Team to the Project Manager on a bi-weekly basis; more often as necessary.

Draft report to be provided to the Project Manager by March 15, 2019.

Drafts to be reviewed and comments provided back to Project Team by March 22, 2019.

Project to be completed by March 31, 2019.

Conflict of Interest

Proponents must indicate if a conflict of interest exists and must provide a statement providing a full and complete disclosure in writing if there is a conflict of interest.

The Steering Committee reserves the right to disqualify any proponent that in its sole opinion has an actual or potential conflict of interest, whether existing now or is likely to arise in the future, or may permit the proponent to continue and impose such terms and conditions, as the Steering Committee in its sole discretion; may require.

Budget

The Budget for this project is estimated at, and in any event, shall not exceed $224,000 inclusive of Harmonized Sales Tax (HST).

Proposal Evaluation Criteria

Proponents must provide a response to each of the following evaluation criteria:

- Understanding of the project requirements
  Provide an overview (maximum one page) that articulates your understanding of and familiarity with the role of municipalities in Nova Scotia, including specific responsibilities and the opportunities and challenges faced by communities outside of HRM.

- Experience and capabilities
  Provide a brief description of three (3) previous projects that have similarity/relevance to this project. Include a current reference for each with contact information.

- Description of the project team
  Provide a list of your proposed Project Team for this assignment, identifying the Team Lead. Indicate each person's anticipated role/title and their area(s) of expertise relevant to this project, e.g. tax/financial/data analysis, engineering and financial support models/programs. Resumes should be attached. The hourly or daily rates and the hours or days committed must be outlined. The proposal price will be a fixed price for completion of the work described. A schedule of planned input hours for each team member must also be included.

- Approach/Methodology
Provide an overview (maximum three pages) of your approach/methodology for this project. Be sure to highlight what you believe to be unique and/or added-value attributes.

- Work Plan and Schedule
  Provide a work plan that identifies project components a project schedule in Gantt chart (or similar) format.

**Note:** CBRM shall hold back 20% of the Proposal Price pending receipt by the Steering Committee of a satisfactory FINAL Report.

**Submission Procedures**

TBD -- to be added by procurement

**Proposal Evaluation**

Understanding of Project Requirement  20
Experience & Capabilities  25
Project Team  25
Approach / Methodology  20
Work Plan / Schedule  10

**Available Background Information**

A library of information is already available or will be made available to the proponent to determine current trends in municipal government in Nova Scotia and establish a statistical baseline of municipal budgets and property values, among other things.

Suggested resources include:

The CBRM's Integrated Community Sustainability Plan: [http://laserfiche.cbrm.ns.ca/WebLink8/1/doc/10601/Page1.aspx](http://laserfiche.cbrm.ns.ca/WebLink8/1/doc/10601/Page1.aspx)

CBRM staff will provide program information, budgets and usage rates for all programs the proponent require.

Any recently completed studies including the Final Fiscal Review Report, the Recreation study completed by the CBRM, such as recreation studies, previous tax structure reviews, and the results of the wastewater study currently underway, once it is completed. Past studies can be found here: [http://www.cbrm.ns.ca/studies-and-reports.html](http://www.cbrm.ns.ca/studies-and-reports.html)

The Department of Municipal Affairs will be able to provide provincial and federal funding values, tax base (historical and current) information for all properties, as well as historical budgetary information for the CBRM and any other municipalities in Nova Scotia that the proponent feels to be necessary.

Statistics Canada – community-level income data may need to be purchased.
November 6, 2018

ADDENDUM #1

RE: CBRM P20-208 – CBRM VIABILITY STUDY

To Whom It May Concern:

With reference to the above noted proposal, please note the following responses to the below proposed questions:

1. Please provide more details pertaining the Value For Money (VFM) assessment (bullet two in the scope of work) (i.e. is it intended that the VFM assessment include detailed evaluation on specific functions/dept. or is it intended to be a high level review across CBRM?)

   High Level across CBRM - with the possibility of a deeper dive along functional or department lines if it is deemed warranted.

2. How many municipalities are desired to be included as part of the jurisdictional scan? (bullet five in the scope of work)

   Up to proponent based on their experience – reasonable sample would be 4-5.

3. Which municipalities does the CBRM typically compare itself to?

   Although we are ¼ of size, we would typically compare CBRM to HRM given they are the only other municipality in the province with an urban/suburban/rural tax base and service delivery mix. We would also expect an exploration beyond the Province of Nova Scotia - with appropriate consideration for jurisdiction and responsibilities.
4. With respect to the analysis of the tax rate system (bullet four in the scope of work), is the expectation to analyze each community within CBRM? Please elaborate on the expectation of the depth and breadth of the tax rate system analysis.

Service based tax structure, not community based - source of differences, efficiency of differences, alternative approaches.

5. With respect to demographic projection analysis (bullet six in the scope of work), is the expectation to analyze each community within CBRM or CBRM as a whole?

CBRM as a whole.

6. Regarding the infrastructure deficit estimation (bullet eight in the scope of work), what level of detail is expected by the CBRM? (i.e. expected level of cost accuracy, requirement for engineering analysis, etc.)

High level – compared to other MU’s, what should CBRM be spending on capital infrastructure compared to our actual spending. No independence to assessment expected, but staff should be consulted.

If you have any questions, please contact our office at 902-563-5015.

Sincerely,

Daniel C. Colbourne
Daniel C. Colbourne, Procurement Officer