**Cape Breton Regional Municipality**

# Council Meeting

## AGENDA

## TUESDAY, MARCH 18, 2025

## 2:00 P.M.

Council Chambers
2nd Floor, City Hall
320 Esplanade, Sydney, NS

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# Cape Breton Regional Municipality

## Council Meeting

## Tuesday, March 18, 2025
## 2:00 p.m.

## AGENDA ITEMS

**Land Acknowledgement**

**Roll Call**

**O' Canada**

1. **APPROVAL OF AGENDA:** (Motion Required)

2. **APPROVAL OF MINUTES:** (Previously Circulated)

   - **Special Council – October 28, 2024**
   - **Special Council – November 1, 2024**
   - **Council Minutes – February 11, 2025**
   - **Special Council – February 18, 2025**
   - **Special Council – March 4, 2025**

3. **PROCLAMATIONS & RESOLUTIONS:**

   3.1 **World Water Day**
   Councillor Steven MacNeil (See page 6)

   3.2 **Purple Day**
   Councillor Steve Gillespie (See page 7)

   3.3 **Transgender Day of Visibility**
   Councillor Earlene MacMullin (See page 8)

   3.4 **World Down Syndrome Day**
   Councillor Glenn Paruch (See page 9)

**Continued…**

## 4. PRESENTATION:

**4.1** **Cape Breton University – Forever:** David Dingwall, President and Vice-Chancellor and Sara Salter-Burke, Vice President, Development (See page 10 )

## 5. BUSINESS ARISING:

### 5.1 Committee of the Whole – March 4, 2025:

a) **Adoption of Wayfinding Strategy for the Cape Breton Regional Municipality:** Will Roy, Community Development Coordinator (See page 33 )

*Wayfinding Strategy Report and Preliminary Breakdown of Anticipated Costs for Signage circulated separately*

### 5.2 Special Council – March 4, 2025:

a) **Appointment of Citizens:** Christa Dicks, Director of Corporate Information Services/Municipal Clerk (See page 39 )

## 6. CORPORATE SERVICES:

**6.1** **CAO Performance Evaluation Process:** Christa Dicks, Director of Corporate Information Services/Municipal Clerk (See page 41 )

**6.2** **Chief Administrative Officer Position:** Mayor Cecil P. Clarke (See page 109 )

## 7. FINANCIAL STATEMENTS:

**7.1** **CBRM Financial Statements to January 31, 2025:** Jennifer Campbell, Chief Financial Officer (See page 112 )

**For Information Only.**

**Continued…**

**8. COMMITTEE REPORTS:** N/A

**9. IN CAMERA:**

**9.1 Approval of In Camera Minutes:** (Previously Circulated)

- **In Camera Special Council – February 18, 2025**

**9.2 Contract Negotiations:** Deanna Evely, Director of Human Resources

*[In* accordance with Section 22(2)(e) of the *Municipal Government Act*]

To be circulated prior to the meeting.

**10. CORRESPONDENCE:**

**10.1 Various Correspondence:** Christa Dicks, Director of Corporate Information Services/Municipal Clerk

- Honourable Kim Masland, Minister of Emergency Management (See page 137)
- Honourable John A. Lohr, Minister of Municipal Affairs (See page 139)
- Nova Scotia Accessibility Directorate (See page 142)
- SolarBank Corp. (See page 144)

**ADJOURNMENT**

# PROCLAMATION

## *World Water Day*

**WHEREAS:** The United Nations has declared Saturday, March 22nd, 2025, as World Water Day themed Glacier Preservation; and

**WHEREAS:** The global campaign, called Glacier Preservation, means as the earth gets hotter, our frozen world is shrinking, making the water cycle more unpredictable.

**BE IT THEREFORE RESOLVED:** That CBRM Mayor Cecil P. Clarke and Council proclaim Saturday, March 22nd, 2025, as "World Water Day" in the Cape Breton Regional Municipality in hopes that residents will be inspired and encouraged to act in their own lives to change the way they use, consume, and manage water. Focus on the critical role water plays in the stability and prosperity of the world. Let's celebrate by remembering our necessity for clean water to support the most basic human needs.

*Councillor Steven MacNeil - CBRM District #8*

**March 18th, 2025**

# PROCLAMATION

## *Purple Day*

| | |
|---|---|
| **WHEREAS:** | Purple Day is a global effort dedicated to promoting epilepsy awareness in countries around the world; and |
| **WHEREAS:** | Epilepsy is one of the most common neurological conditions, estimated to affect over 50 million people worldwide and 42 people in Canada are diagnosed every day; and |
| **WHEREAS:** | Purple Day will be celebrated on March 26 annually to increase understanding, reduce stigma and improve the quality of life for people with epilepsy throughout the country and globally. |
| **BE IT THEREFORE RESOLVED:** | That CBRM Mayor Cecil P. Clarke and Council proclaim March 26, 2025 "Purple Day", in an effort to raise awareness of epilepsy in the Cape Breton Regional Municipality |

*Councillor Steve Gillespie - CBRM District #4*

**March 18, 2025**

# PROCLAMATION

## *Transgender Day of Visibility*

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**WHEREAS:** The Cape Breton Regional Municipality is committed to building a welcoming and inclusive community for all which strengthens and fosters mutual understanding among the transgender, non-binary and gender non-conforming community; and

**WHEREAS:** Every resident of the Cape Breton Regional Municipality has the right to have equal access to services, employment, and facilities without discrimination, harassment, acts of verbal or physical violence or abuse; and

**WHEREAS:** Transgender Day of Visibility celebrates the accomplishments of transgender, non-binary and gender non-conforming minorities while fighting transphobia, acts of verbal and physical violence, prejudice, discrimination, and abuse.

**BE IT THEREFORE RESOLVED:** That CBRM Mayor Cecil P. Clarke and Council proclaim March 31st, 2025, as Transgender Day of Visibility in the Cape Breton Regional Municipality.

*Councillor Earlene MacMullin - CBRM District #2*

**March 18th, 2025**

# PROCLAMATION

## ***World Down Syndrome Day***

**WHEREAS:** March 21st is World Down Syndrome Day, a day to raise public awareness, promote inclusivity, and advocate for the rights, well-being, and independence of individuals with Down Syndrome; and

**WHEREAS:** World Down Syndrome Day provides an opportunity to celebrate the achievements and contributions of individuals with Down Syndrome, while also recognizing the importance of equal opportunities, access to quality education, healthcare; and

**WHEREAS:** People with Down Syndrome make significant contributions to the fabric of our communities. They participate in the workplace, run their own businesses, create art and music, excel in sports and recreation, and pursue studies in schools, community college and university within the CBRM;

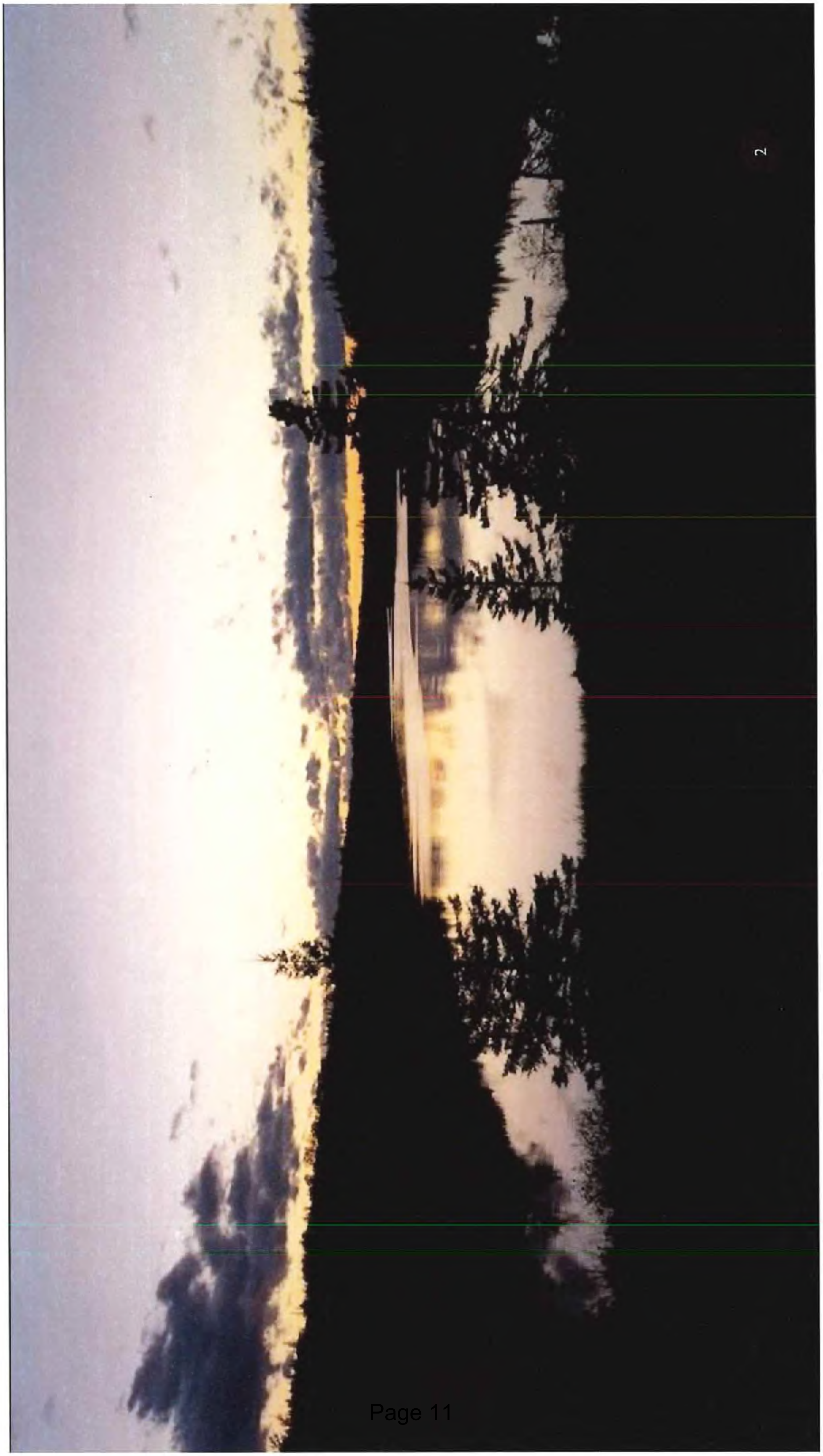
**BE IT THEREFORE RESOLVED:** That CBRM Mayor Cecil P. Clarke and Council proclaim March 21, 2025 as "World Down Syndrome Day" in the Cape Breton Regional Municipality.

*Councillor Glenn Paruch - CBRM District #6*

**March 18th, 2025**

CBU

FOREVER



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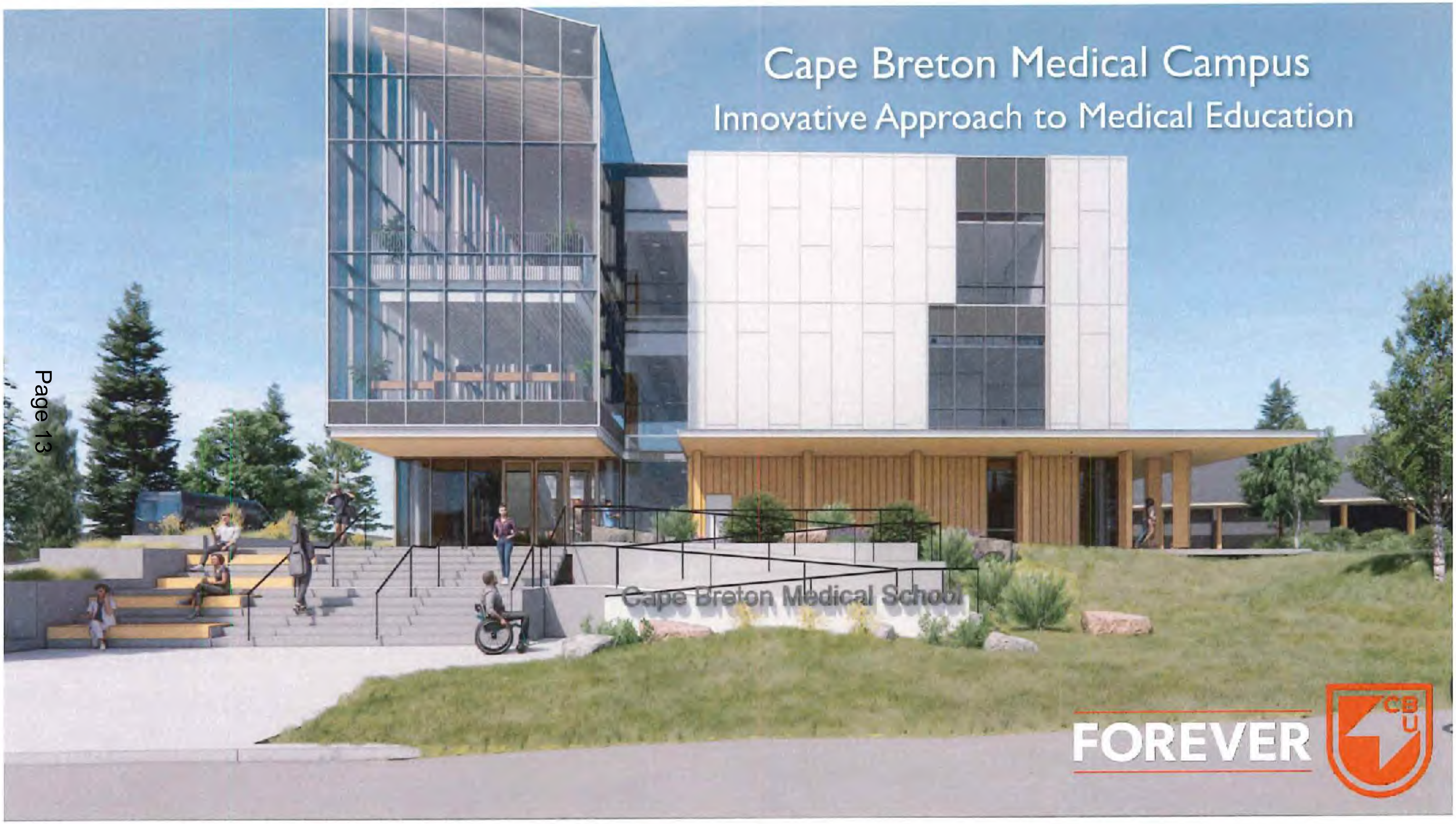
Cape Breton Medical Campus
Innovative Approach to Medical Education
Cape Breton Medical School
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Community Engagement
Van Program
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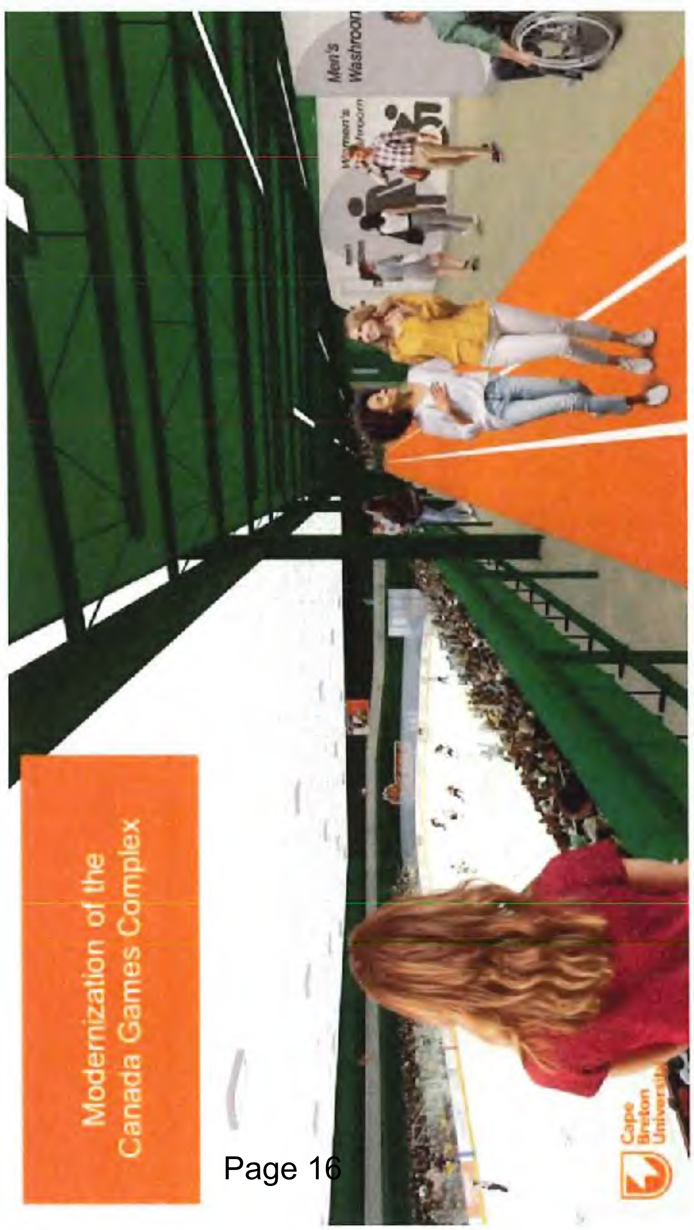
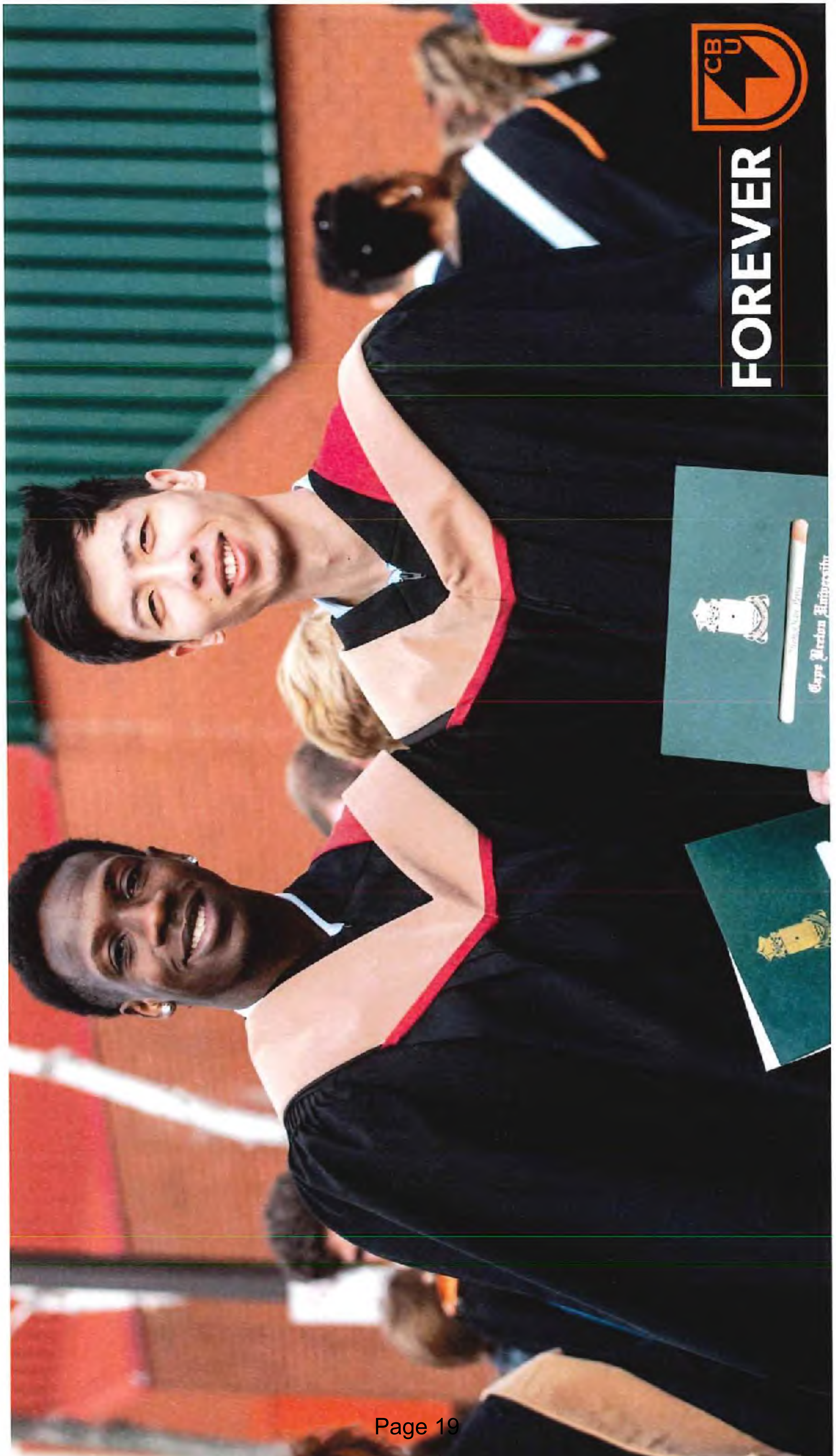

Modernization of the
Canada Games Complex
Men's
Washroom
Cape
Breton


CBU Early Childhood Centre
CBU 20 YEARS OF
SHAPING LITTLE
MINDS!

CBU

FOREVER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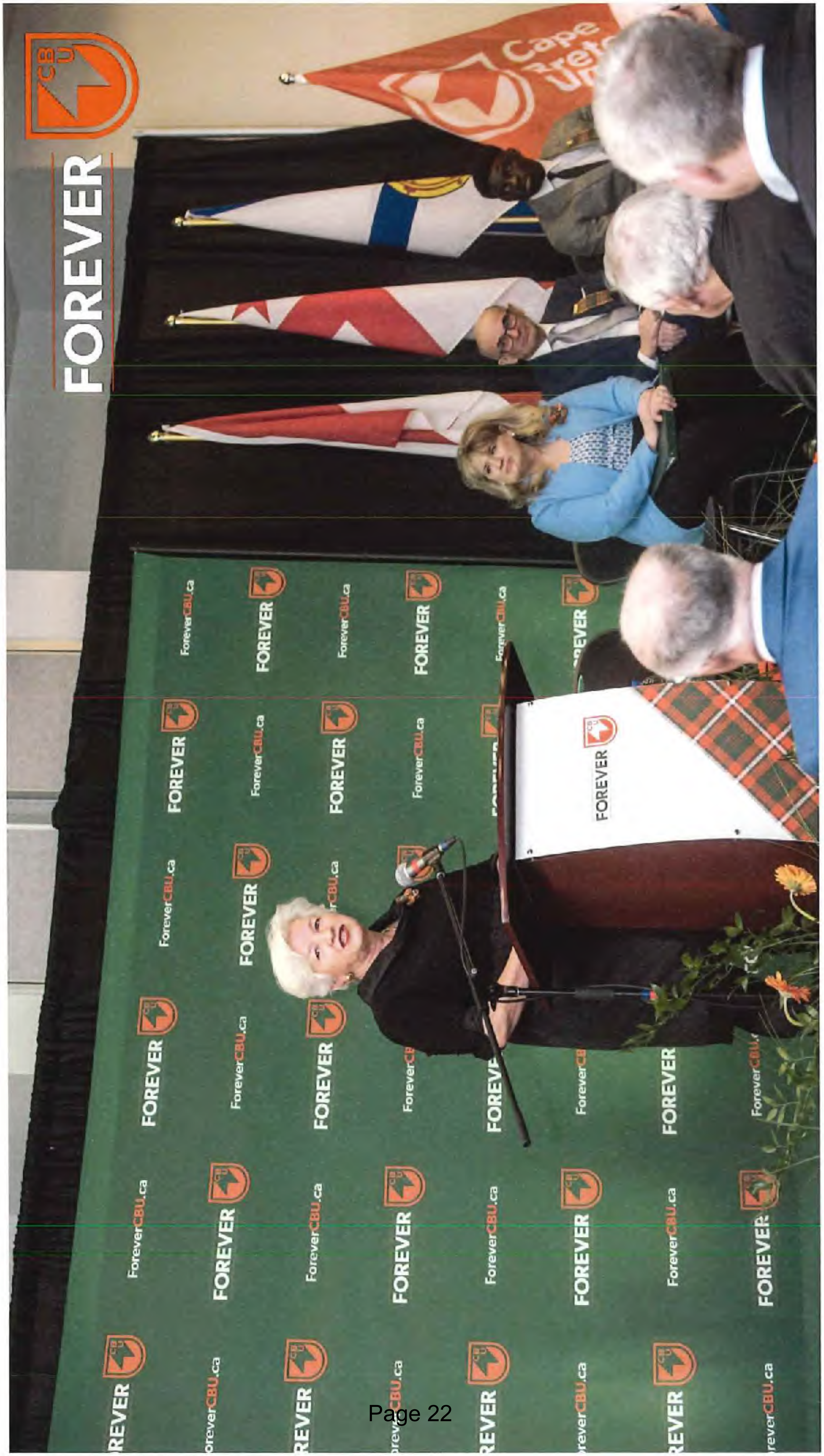
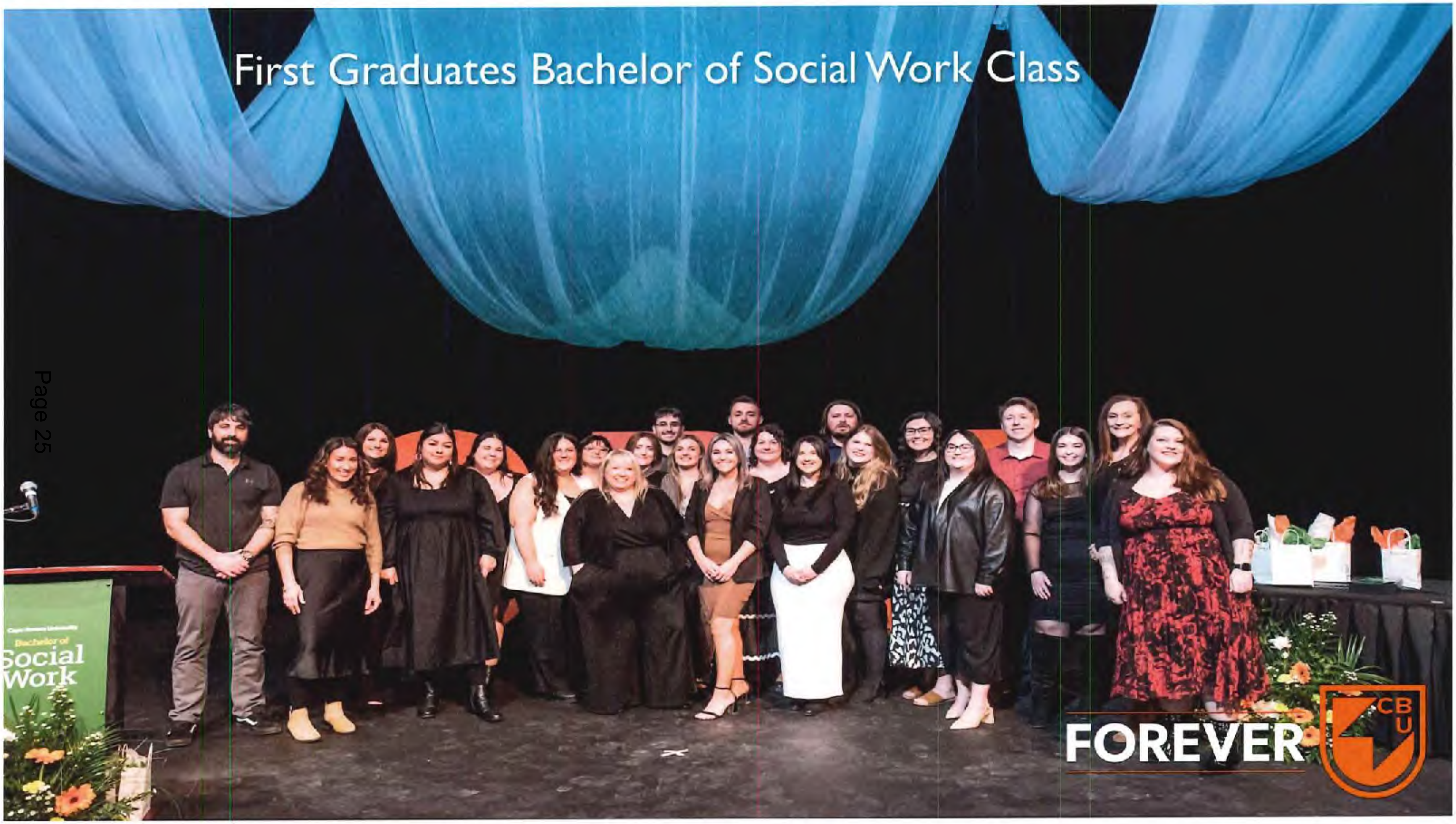

FOREVER
ForeverCBU.ca


CBU
FOREVER


Nancy Dingwall Health and
Counselling Centre
FOREVER
CBU


First Graduates Bachelor of Social Work Class
Bachelor of
Social
Work
FOREVER
CBU


Centre for Discovery and Innovation
FOREVER
CBU


FOREVER
CBU
Centre for Discovery & Innovation


Marshall Legacy Centre
Kespukwitk
Sikepne'katik
Eski'kewaq
Unama'kik
Piktuk aqq Ep
Sikniktewaq
FOREVER
CBU


Cape Breton Medical Campus
Innovative approach to medical education
Cape Breton Medical School
FOREVER
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Cape Breton Medical Campus
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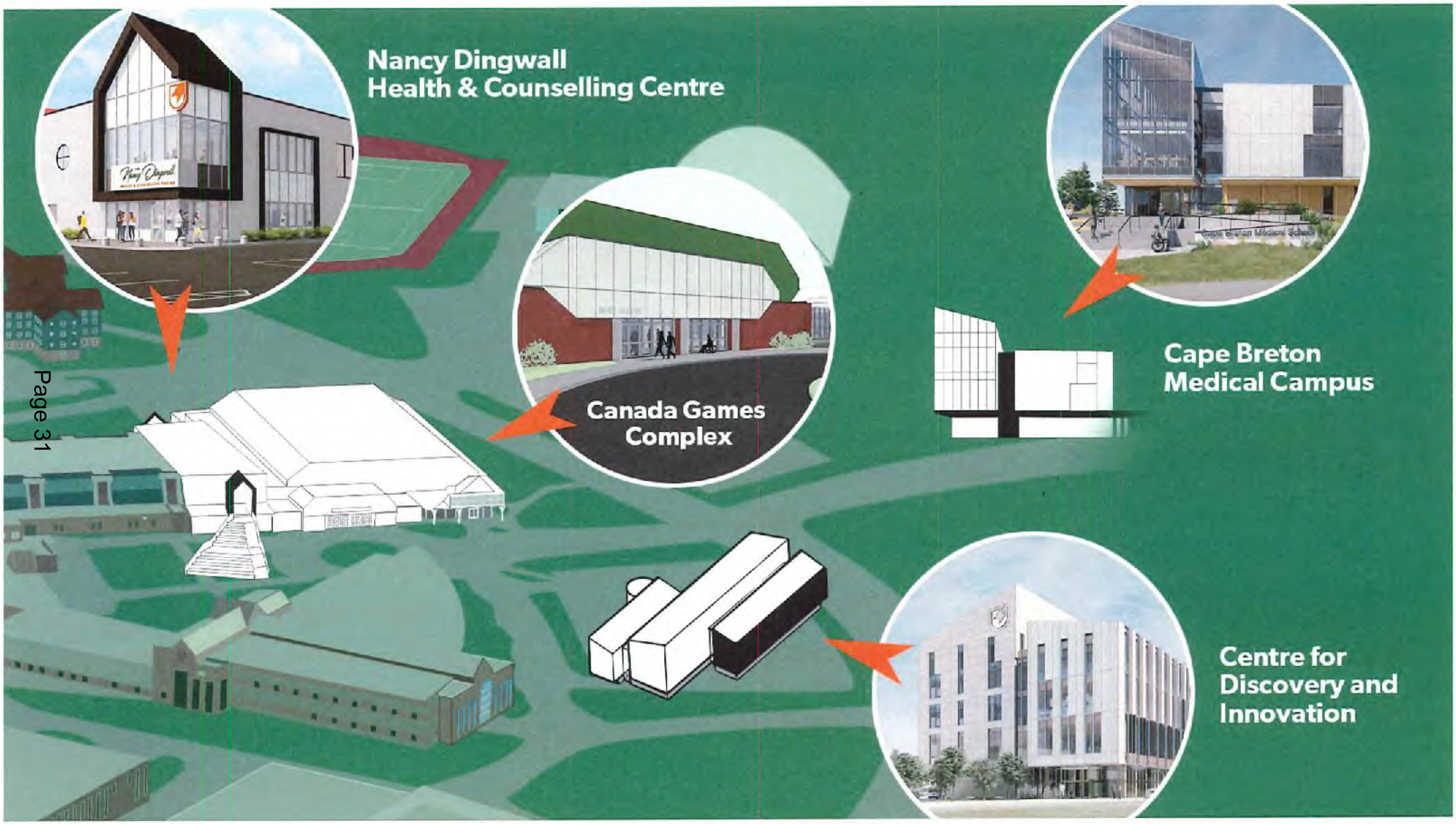
Nancy Dingwall
Health & Counselling Centre
Canada Games
Complex
Cape Breton
Medical Campus
Centre for
Discovery and
Innovation

CBU

FOREVER

## Adoption of Wayfinding Strategy for the Cape Breton Regional Municipality

### Motion

Moved by Councillor MacMullin seconded by Councillor O'Quinn, that a recommendation be made to Council to adopt the wayfinding strategy and recommended approach as set out in the report presented, subject to modifications.

**Motion Carried**

DRAFT

CAPE BRETON
REGIONAL MUNICIPALITY

| | |
|---|---|
| **TO:** | Mayor Clarke and Members of CBRM Council |
| **SUBMITTED BY:** | Demetri Kachafanas, Interim Chief Administrative Officer |
| **DATE:** | February 24, 2025 |
| **RE:** | **Adoption of Wayfinding Strategy for the Cape Breton Regional Municipality** |

## ORIGIN

CBRM Staff led initiative.

## RECOMMENDATION

It is recommended that CBRM Council adopt the wayfinding strategy prepared by Fathom Studio, as set out in Attachment A, and approach to wayfinding and implementation, as outlined in the Discussion and Financial Implications sections of this report.

## BACKGROUND

CBRM has lacked a consistent wayfinding system that connects current residents, new residents, and visitors. This is significant as CBRM is a large municipality consisting of 110 communities across 8 former municipal units, 2 Mi'kmaq communities, multiple provincial parks, a national historic site, other tourism assets and community facilities spread across a large geographic area.

Several policy and strategy documents cite the need for improved wayfinding in CBRM as a program worth investing in. These plans include the CBRM Forward Municipal Planning Strategy, CBRM In Motion, CBRM Accessibility Plan 2022 as well as plans from partners such as the Downtown Sydney Urban Core Plan of 2017, and the #Riseagain2030 Cape Breton Island Destination Development Strategy.

In 2022/23 the Atlantic Canada Opportunities Agency (ACOA) provided federal funding for a comprehensive wayfinding strategy under the Rediscover Main Streets Program. Through a tender process, Fathom Studio was contracted to work with CBRM staff to complete a new comprehensive wayfinding strategy for the municipality.

**DISCUSSION**

*What is Wayfinding?*

Wayfinding is the practice of helping people find their way through public spaces. Signage plays a big role in wayfinding, making places more "legible" to residents, visitors and newcomers. Effective wayfinding should anticipate needs and answer many questions that people have about new environments. For example, a good wayfinding system should help visitors with questions including: 1) is this the best/correct route? 2) have I arrived at my destination? 3) What destinations should I know about in this new place?

Wayfinding is a set of strategies to help point residents and visitors in the right direction. People who return to the same places, day after day, month after month, often do not require assistance finding their way. However, visitors and newcomers who are looking for a destination in an unfamiliar place will need some cues to get to their intended destination.

Wayfinding is also about destinations, what name to use, when, and whether to use names or symbols or both. Including every possible destination would be impossible, as such wayfinding is about prioritizing what destinations to include, at what point in the process, and when, where, and what elements of the system they may appear on.

*The Need for Physical Wayfinding in a Digital Age?*

Digital wayfinding tools are a supplement to conventional media such as signage rather than a replacement for physical wayfinding options. Implementing a quality wayfinding system allows residents and visitors to navigate by observing their surroundings, this helps develop a sense of place and foster an appreciation and knowledge of their surroundings. Wayfinding contributes to a welcoming environment enabling visitors to arrive at their destination safely, find the services they need or want, and leave with a positive perception of the community. Further, for residents, signage can instill a sense of community pride and raise awareness of less known amenities and attractions, especially in a large community like CBRM.

*Best Practices in Wayfinding*

Best practice in wayfinding is to use as few signs as possible while maintaining functionality. This includes minimizing the use of confirmation signage and ensuring directional signs are only placed at key decision points along the way to a destination. It is also important to ensure new signs replace existing signs and old signage is removed at the time of installation. This approach ensures signs are up to date and in good repair without duplicative or cluttered messaging.

Effective signage design and placement ensures signage is concise, legible, relevant, and useful. Symbols or pictograms used should aid in understanding and should be limited to symbols that are in wide use and recognizable. Colour may be used to reinforce messaging and may contribute to improved brand recognition and sense of place. Signs and navigation should meet accessible design standards, including placing signs at legible height, with high contrast text, and simple messaging.

*Review of CBRM's Current Wayfinding*

Fathom Studio performed an audit of CBRM's wayfinding infrastructure which greatly reinforced the need for a comprehensive wayfinding strategy. Key findings from Fathom Studio's initial audit included:

1) Current CBRM gateway identification signs do not incorporate all elements of the Municipality's current brand or colours;

2) Community identification signs vary widely in shape, size, style and brand, sometimes even within a single community. There is also inconsistency in placement of signs at community boarders and boundaries. Some gateway signs are in significant disrepair;
3) Road Signs are in place however often there is inconsistency between styles. Other times, there are duplicate signs in close proximity;
4) Park identification signs vary in style and repair. Some are very attractive but do not feature CBRM branding. Signs are often installed parallel to traffic and do not assist residents and visitors searching for a particular destination; and
5) Similar to park identification signs, facility identification signs vary in size, style and appearance.

*Branding and Sign Hierarchy*
Branding did not form a component of the wayfinding strategy. Based on feedback from staff, Fathom Studio kept sign branding minimal to ensure signage remains flexible and relevant in the event of updates to municipal branding. Flexibility granted through a minimally branded sign type allows easy integration updates to brand, colouring or community symbols. Should Council proceed with a review of municipal branding in the future, signage adopted and installed under the wayfinding strategy will allow for changes that reflect updated or new municipal branding and design.

The wayfinding strategy focuses on the hierarchy of signage, emphasizing scale and form to improve navigation and accessibility. The strategy provides guidelines for signage installation, ensuring consistency and functionality across the community. This framework enhances wayfinding, adapts as the community grows and allows for future changes in branding.

*Choosing Destinations for Wayfinding*
When choosing destinations within CBRM, staff and Fathom were selective, prioritizing direct users of community assets, both CBRM-owned and otherwise, that that are accessible, useful, important year-round, and available to a broad audience. Destinations that are of recreational, cultural, historical, and or utilitarian importance were also targeted.

*Implementation of Deliverables from Wayfinding Strategy*
In addition to the work completed as part of the audit of CBRM's existing signage, Fathom Studio prepared a comprehensive wayfinding strategy that allows for effective implementation. Notably Fathom Studio has identified:

1) An entirely new sign family for use in wayfinding within the CBRM;
2) A detailed location plan of all 339 recommended gateway, directional and facility identification signs;
3) Fabrication specifications for each sign type;
4) Complete design for all initially proposed signs;
5) A guide for how to update the wayfinding system to reflect our community as it evolves; and
6) Initial estimates of costs for each sign type.

*Next Steps – Approach to Wayfinding in CBRM and Proposed Implementation*
Staff recommend that Council adopt an implementation approach to wayfinding that is phased, beginning with high visibility gateway signs, and replacement of missing or worn destination signs. Staff recommend an ad-hoc approach to replacement of signage, whereby signs are replaced on an as-needed basis when they are due for replacement. Staff will also explore opportunities for funding as signage is replaced. The strategy further recommends:

1) Replacement of Gateway Signage at Entry Points to the Municipality
    a. Seek funding for fabrication and installation of wayfinding system starting with major gateway signs to establish wayfinding signage look and feel as visitors enter the CBRM.
2) Identification of Initial Priority Signs
    a. Identify current gaps in wayfinding signage (missing facility identification or destination signs).
    b. Identify signs that are redundant, at end of life and or in poor repair.
    c. Grouping wayfinding sign installations by region to ensure that wayfinding interventions are complete, including all navigation and destination signage.
3) Installation of Wayfinding Signage
    a. Install new signs at Municipal Gateways.
    b. Install missing or replace deteriorated facility identification/destination signage.
    c. Begin installation of wayfinding signs by region or cluster in a phased approach.
    d. Continue to replace signs with new sign typologies as old signs reach end of life and are due for replacement.
4) Maintain New Wayfinding System
    a. Inspect signs for wear, visual obstructions, and damage annually.
    b. Ensure that wayfinding signs or pathways are updated as routes, destinations or other changes occur.
    c. Use wayfinding strategy to determine appropriate wayfinding for new community assets as they are developed.

## COMMUNITY ENGAGEMENT

The level of community engagement was consultation through in-person meetings with stakeholder organizations and an open house session held at the James McConnell Memorial Library. Additionally, Fathom Studio held consultation with the Municipality's neighbouring Mi'kmaq communities.

## FINANCIAL IMPLICATIONS

Development of the wayfinding strategy has no further budget implications. Funding for Fathom Studio to undertake this work was funded through a combination of planning department professional services and a significant contribution from ACOA under the Rediscover Main Streets Program.

Installation and maintenance of a cohesive wayfinding system requires additional budgetary commitments. Fathom Studio's initial estimate for the cost to implement all proposed signs in this plan is $1,872,450.00. This includes the fabrication and installation of 339 signs throughout the municipality. Over one third of the total amount is allocated for major gateway signs welcoming residents and visitors to CBRM. The remainder is allocated to facility identification signs, including navigational signage throughout the municipality. A preliminary breakdown of anticipated costs for signage is provided as Attachment B.

To ease budgetary implications, staff recommend phasing new signage in over time and accelerating implementation when external funding can be obtained. Funding from other levels of government may be sought for signs with significance to tourism, including major gateway signs. Fathom Studio noted most signs come with a five-to-ten-year warranty and often remain in service for far longer. By amortizing directional, navigation and facility signs over this time, staff recommend an annual maintenance and implementation budget for navigational signage at under $150,000.00 per annum.

Costs may increase when facilities and sites are added beyond the scope of the initial location plan proposed by Fathom Studio, as new content would require modification or the addition of new signs and supportive navigation signage.

## ALTERNATIVES

1. Council may choose to adopt the wayfinding strategy and recommended approach, as set out in this report, subject to modifications.

2. Council may choose not to adopt the wayfinding strategy and recommended approach.

## ATTACHMENTS - Circulated separately

**Attachment A:** Wayfinding Strategy Report
**Attachment B:** Preliminary Breakdown of Anticipated Costs for Signage

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**Report Prepared by:**

William Roy, Community Development Coordinator, Planning and Development 902.563.5072
Tyson Simms, Director, Planning and Development 902.574.1936

**Cape Breton Regional Municipality**
**320 Esplanade**
**Sydney, NS B1P 7B9**

| | |
|---|---|
| To: | **Mayor Clarke and Council** |
| Submitted by: | **Christa Dicks, Municipal Clerk** |
| Date: | **March 18, 2025** |
| Subject: | **Appointment of Citizens** |

At the February 11th, 2025, meeting of Council, the following motion was passed:

**Motion**
Moved by Councillor Paruch, seconded by Councillor Sheppard-Campbell, to approve the recommendations regarding vacancies on various committees as follows:

- Refer the applicants as presented for the Accessibility Advisory Committee to Council
- Refer the applicants as presented for the Audit Committee contingent on qualifications to Council
- Refer the applicants as presented for the Diversity, Equity, and Inclusion Committee to Council
- Refer the applicants as presented for the Heritage Advisory Committee to Council
- Defer all applications for the Library Board for additional time for review
- Defer all applications for Police Commission for additional time for review
- That Council direct staff to reissue a call for public interest to serve on the Accessibility Advisory Committee
- That Council direct staff to reissue a call for public interest to serve on the diversity, equity, and inclusion committee after the terms of reference have been developed

**Motion Carried**

Citizen appointments to the Library Board and Police Commission were deferred to allow Council additional time to review the applications which were then referred and approved on March 4th, 2025 during a Special Council meeting.

All selected applicants have accepted the positions to various Committees and Boards and any required background checks have been completed and are in order.

The successful candidates are as follows:

- **Accessibility Advisory Committee (2-year term)**
  - Mairibeth Reilly
  - Denise McSpadden
  - Kyron Coombes
  - Kim Bates
  - Kathy MacIntyre

- **Audit Committee (2-year term)**
    - Sue Forrester
    - Mark Galley

- **Diversity, Equity, and Inclusion Committee (3-year term)**
    - Chen Lu
    - Ethan Paul
    - Kathy MacIntyre
    - Lillian Marsman

- **Heritage Advisory Committee (2-year term)**
    - Alynese Nightingale
    - Kyron Coombes
    - Saul MacNeil
    - Richard Rose
    - Spyro Trifos
    - Ethan Paul

- **Cape Breton Regional Library Board (2-year term)**
    - Ann Dunn
    - Jean MacAulay MacIntyre

- **Police Commission**
    - Tom Vickers
    - Ken Tracey
    - Matthew Conner

A full list of citizen and Council appointees will be posted at www.cbrm.ns.ca.

*Original signed by:*

**Christa Dicks**
**Director of Corporate Information Services/Municipal Clerk**

A copy of this report can be obtained online at www.cbrm.ns.ca or by contacting the Office of the Municipal Clerk at 902-563-5010

Report Prepared by: Christa Dicks, Municipal Clerk/Director Corporate Information Services

**Cape Breton Regional Municipality**
**320 Esplanade**
**Sydney, NS B1P 7B9**

| | |
|---|---|
| **To:** | **Mayor Clarke and Council** |
| **Submitted by:** | **Christa Dicks, Municipal Clerk** |
| **Date:** | **March 18, 2025** |
| **Subject:** | **CAO Performance Evaluation Process** |

**Origin**
Staff initiated.

**Legislation and Related Policies**
*Municipal Government Act*, Sections 28, 30, 31

**Recommendation**
It is recommended Council:

1. Approve the Chief Administrative Officer Performance Evaluation Policy as presented at the next meeting of Council.

2. Establish a CAO Performance Evaluation Committee as outlined in the Chief Administrative Officer Evaluation Policy Section 7.

**Background**
The ongoing policy evaluation process by the Clerk's Office, combined with discussions during recent budget deliberations regarding the CAO's position, has revealed that there is currently no formal policy in place to evaluate the CAO's performance. Given the CAO's pivotal role in governance, operations, and strategic alignment, creating a transparent and consistent performance evaluation framework is essential.

**Discussion**
Historically, the CAO's performance evaluations were conducted on an ad hoc basis. Moving forward, a more structured and consistent approach is recommended to ensure performance is measured against clear benchmarks tied to Council's strategic priorities. By establishing well-defined criteria and objectives, Council can effectively track progress, recognize achievements, and address areas of concerns. A formal, transparent policy would clarify the CAO's responsibilities, set clear priorities, and support ongoing professional development. Additionally, a policy would increase accountability and foster a collaborative relationship between Council and the CAO.

Within the proposed policy, it is also recommended that a performance evaluation committee, consisting of four Council members be established to oversee an annual evaluation process and report the results back to Council. This approach provides a balanced oversight and diverse perspectives, ensuring the evaluation reflects a range of community priorities. The committee would recognize best practices and use resources such as the CAO Performance Evaluation Toolkit from the Canadian Association of Municipal Administrators (CAMA). The evaluation process would include clear timelines, objective metrics, structured feedback, and targets.

With the results of the annual evaluation, the committee would provide recommendations to Council on contract updates, adjustments to compensation, and targeted initiatives for professional development. This structured, policy-based approach is expected to promote continuous improvement, foster greater alignment with the Council's priorities and strengthen the overall governance framework.

**Financial Implications**
Policy development and activities are undertaken using existing resources.

**Options**

1. CBRM Council may adopt the recommendation with modifications. This may require a supplementary staff report.

2. CBRM Council may refuse the recommendation in part or in whole.

**Attachments**

A – CAO Performance Evaluation Policy See page 43
B – NSFM How to Conduct an Effective CAO Performance Review See page 45
C – CAMA CAO Performance Evaluation Toolkit: Guide for the Mayor and Council See page 73
D – CAO Job Description See page 104

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A copy of this report can be obtained online at www.cbrm.ns.ca or by contacting the Office of the Municipal Clerk at 902-563-5010.

Report Prepared by: Christa Dicks, Municipal Clerk 902-563-5010.

Attachment A

Cape Breton Regional Municipality
320 Esplanade
Sydney, NS B1P 7B9

| Title | Chief Administrative Officer Performance Evaluation |
|---|---|
| Date | |
| Revision Date | |
| Replaces | |

1. **Title**
Chief Administrative Officer Performance Evaluation Policy

2. **Legislative Authority & Related Policies**
*Municipal Government Act*, Sections 28, 30, 31

3. **Policy Statement**
Regular performance evaluations ensure that the Chief Administrative Officer is provided with accurate and appropriate feedback with goals of enabling and achievement of corporate objectives and improving municipal performance.

4. **Purpose**
4.1. The performance evaluation of the Chief Administrative Officer is a valuable instrument which can serve to:
4.1.1. Discuss the relationship between Council and the Chief Administrative Officer;
4.1.2. Provide clarity on expectations of the position; and
4.1.3. Provide an assessment of the performance of the role, responsibilities, and authority as set out in the legislation, this policy, and the job description.

5. **Scope**
5.1. This policy applies to the Chief Administrative Officer as the only employee of the CBRM Council.

6. **General Provisions and Principles**
6.1. The annual performance review is part of an ongoing performance management process by which Council and the CAO work together to plan, monitor, and review work objectives. The review includes the development of measurable criteria that:
6.1.1. Align with the organization's strategic direction and culture;
6.1.2. Are practical and easy to understand;
6.1.3. Provide an accurate picture of expectation and performance;
6.1.4. Reflect the responsibilities assigned to the CAO by contract, policy, and legislation;
6.1.5. Include a collaborative process for setting goals and reviewing performance based on tow-way communication between the Council and CAO;
6.1.6. Monitor and measure results (what) and behaviours (how);
6.1.7. Ensure that administrative work plans support the strategic direction of the organization;
6.1.8. Identify and recognize accomplishments; and
6.1.9. Support administrative decision-making.
6.2. Performance evaluations will be completed annually immediately following the budgetary process, or another date as mutually agreed by the Performance Evaluation Committee and the CAO.

6.3. Annual performance evaluations will be completed using industry best practices including the Canadian Association of Municipal Administrators CAO Performance Evaluation Toolkit.

6.4. All communications related to the CAO Performance Evaluation are confidential.

**7. Roles and Responsibilities**

7.1. A CAO Performance Evaluation Committee will be established to facilitate and support excellent communications and positive collaborative effort between the CAO and elected officials.

7.1.1. The Committee will consist of a Chair and three members of Council for the duration of their appointment; and

7.1.2. A new committee will be established by January 31st immediately following a regular election held under the *Municipal Elections Act.*

7.2. The committee chair will schedule the date and time of the annual evaluation in consultation with the committee and the CAO.

7.3. Where an annual evaluation has not been scheduled within one month of completion of the budgetary process, the CAO will initiate the scheduling of the meeting with the committee.

7.4. Committee members will sign evaluations which will be securely stored in a confidential file in the Mayor's Office.

7.5. The Chair, with the Committee, will provide the evaluation to Council at a closed session as per Section 22(2)(c) and (e) of the *Municipal Government Act.*

**8. Policy Review Requirements**

8.1. Annually

**9. Communication**

9.1. Once approved, this policy is provided by the CAO to the Performance Evaluation Committee.

9.2. In the event the CAO's position is vacant, the policy is provided for annual review and to the Performance Evaluation Committee by the Clerk's Department.

Attachment B

# How to Conduct an Effective CAO Performance Review

Nova Scotia Federation of Municipalities
2023 Spring Conference

Presented by
Gerald Walsh Associates Inc.

# Performance reviews are universally unpopular

- 66% were strongly dissatisfied with their performance review process and said it interferes with their productivity.
- 65% reported the process is not even relevant to their jobs.
- 61% felt the process was outdated.
- 62% felt it was often incomplete, too generic, or too infrequent.

# Why conduct performance reviews?

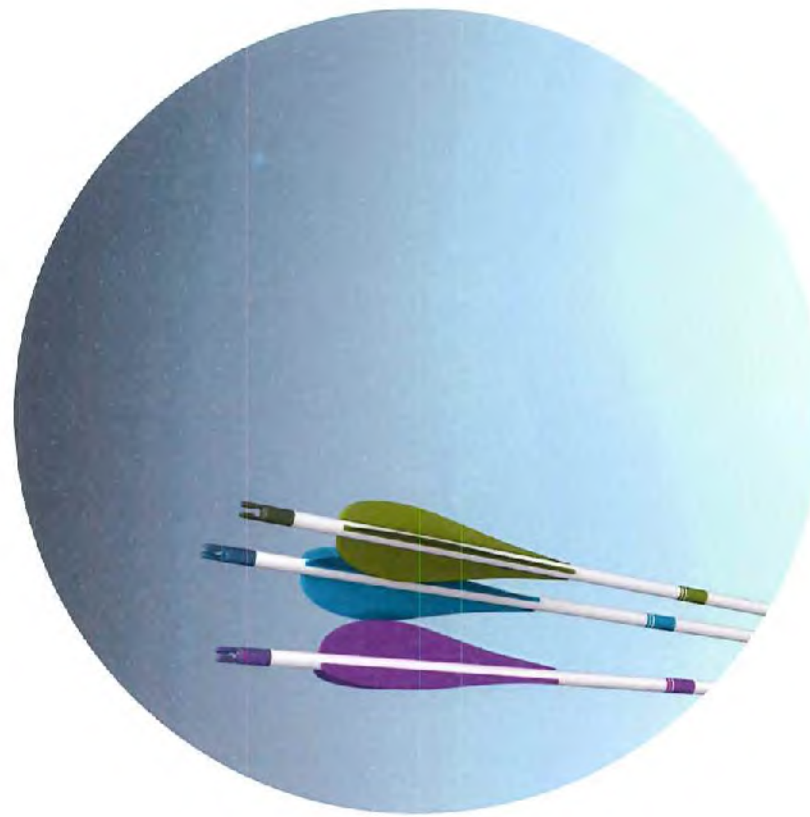
- Gives CAO an opportunity to report on progress against goals.
- Invites Council members to reflect on CAOs overall performance.
- Identifies areas for development.
- Formalize goals for the coming year.

# Uncouple pay from performance

- Discussing compensation can undermine honest conversations about performance, goals, and development.

# Challenges in conducting performance reviews

- Scope of evaluation (lack of clear performance criteria)
- Subjectivity and bias
- Getting relevant feedback
- CAOs resistance to feedback
- Timing of evaluation
- Political influences



# Best process to use for CAO evaluation

1. Gather background materials
2. Build support for process
3. Decide who will lead the process
4. Provide Council with overview
5. Design and distribute assessment tool
6. Discuss results with Council
7. Review results with CAO and develop action plans
8. Support CAO plans in coming year

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# Gather background materials

- CAOs job description
- Municipal Government Act
- Strategic plan
- Annual goals and objectives
- Financial statements vs budget
- CAOs individual performance plan

# Who should provide performance feedback?

- Council
- Direct reports
- Self-evaluation

## Performance objectives for a CAO / scope of evaluation

- Leadership
- Strategic orientation
- Financial management
- Human resource management
- Governance and council relations

# Leadership

**The CAO:**

1. Exercises sound judgment in dealing with significant issues affecting the Municipality.
2. Displays a high level of integrity, honesty, and fairness always.
3. Demonstrates a clear understanding of the local, regional, provincial, and national issues affecting the Municipality.
4. Ensures the effective stewardship of human, financial and physical resources.
5. Identifies, assesses and manages the significant risks to the Municipality.
6. Ensures that municipal services are delivered efficiently and effectively.
7. Supports diversity, equity, and inclusion initiatives.

# Strategic orientation

**The CAO:**

8. Develops and communicates clear business plans that reflect Council' s strategic priorities.
9. Monitors and evaluates objectives and plans to ensure they are achieved and takes action as needed.
10. Reviews and, where appropriate, adjusts the long-term strategies and objectives of the Municipality in consultation with Council.

# Human resource management

**The CAO:**

15. Ensures comprehensive performance reviews are conducted for all staff.
16. Ensures adequate staff resources are in place to carry out the work of the Municipality.
17. Has created a succession plan for all critical positions in the Municipality.
18. If required, brings confidential human resource matters to Councils attention.
19. Takes concrete steps to ensure employees' health, safety, and overall wellness.

# What is the best scoring method?

# Rating Scale

- ☐ Strongly agree
- ☐ Agree
- ☐ Slightly agree

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- ☐ Slightly disagree
- ☐ Disagree
- ☐ Strongly disagree

------------------------------

- ☐ Do not know / unable to answer

# The value of qualitative feedback

- Enables evaluators to give more specific feedback on CAO strengths, weaknesses and areas for improvement
- Specific examples of CAOs contributions and achievements demonstrates that Council is paying attention and values their contributions

# At end of survey

What are the CAOs greatest strengths?

What are the things you appreciate the most about the CAO?

What areas would you like to see the CAO improve in the coming year?

Are there any specific training opportunities the CAO should utilize?

## Direct reports

**The CAO ...**

1. Communicates the goals and strategy to the team clearly.
2. Keeps the team focused on our priorities and results.
3. Is open to new ideas and values the perspective I bring to the team.
4. Provides constructive feedback that helps me improve my performance.
5. Shows an interest in me as a person.
6. Supports my professional development and growth.
7. Is authentic and inspires trust.
8. Grants me the autonomy to do my job and does not micromanage me.
9. Shares relevant information with the team that helps us do our jobs better.
10. Is available when I need her, and she listens well when I have concerns.
11. Leads by example, and I consider her a role model.
12. Is a collaborative leader who actively encourages participation from all.
13. Supports me in my relationship with Council.

## Direct reports

**Open-ended questions:**

1. What is one thing the CAO does very well as a leader?

2. What is one thing the CAO could improve upon to be more effective as a leader?

3. How can the CAO help you be more successful in your role with MODY

# Who should provide performance feedback?

Council
- Quantitative
- Qualitative

Direct reports
- Quantitative
- Qualitative

Self-evaluation

# Biases that impact performance reviews

- Halo effect
- Horns effect
- Recency bias
- Similarity bias
- Contrast effect
- Leniency bias

# Third-party facilitator can help the process

# CAO performance review meeting

**Agenda:**

- Introduction and purpose
- Review of goals (KPIs) from previous year
- Self-evaluation
- Goal-setting for coming year
- Development plan
- Written summary with timelines

# CAO performance review meeting

**Conversation:**

- Positive and constructive tone
- Ask open-ended questions
- Be specific and objective
- Listen actively
- Collaborate on goal-setting

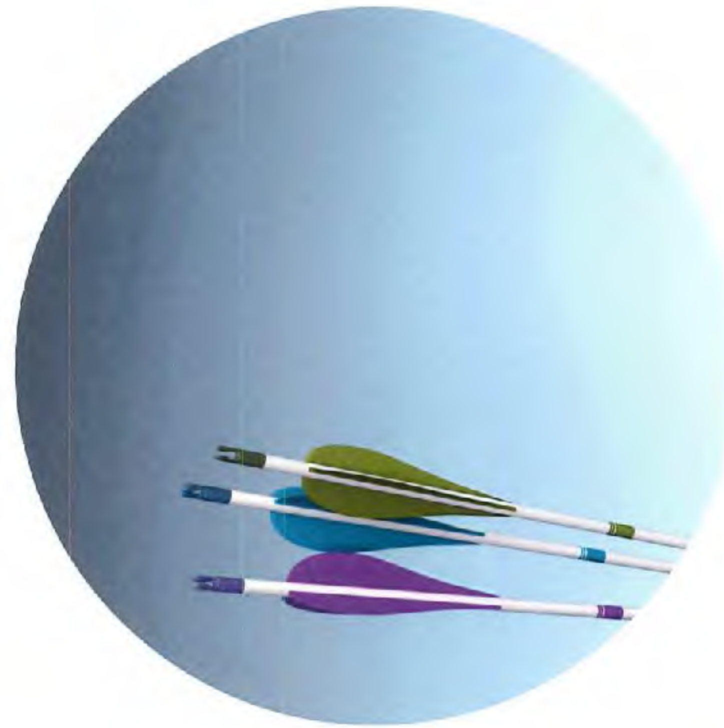
# Why might a CAO resist feedback?

- Fear of criticism / only focusing on the negative
- Perception of bias
- Defensive
- Self-doubt
- Worried about consequences
- Lack of trust and respect


# Best timing for a performance review

## Key takeaways

- Objective and fair performance evaluations are crucial for the effective management of municipal governments
- Establish clear objectives, use proper evaluation methods, gather valid feedback, and ensure the process is fair, unbiased and transparent
- Success depends on evaluators skills and expertise, and CAOs willingness to accept feedback, engage in constructive dialogue, and commit to improvement



# Questions and Answers

# How to Conduct an Effective CAO Performance Review

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Attachment C


# CAO Performance Evaluation Toolkit

## Guide for the Mayor & Council

**An Ongoing Process: Not Just an Annual Event**

A FREE RESOURCE BENEFITING CANADIAN MUNICIPALITIES

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# Message From the Canadian Association of Municipal Administrators

It seems like a given, but regular performance evaluations of the Chief Administrative Officer (CAO) are not always a forethought for the Mayor and Council. Feedback suggests that when it is happening, it is not always used effectively. The Canadian Association of Municipal Administrators (CAMA) recognizes that performance evaluation is **an ongoing process and not just an annual event.** To facilitate the process, CAMA launched a Toolkit in 2017 with the support of our members, the Federation of Canadian Municipalities (FCM), and the elected officials, who completed our surveys at that time.

Over the years, we have heard feedback from our members and their Councils on the Toolkit and are pleased to provide you with a **new updated and improved 2023 edition**, which continues to be a flexible model that provides you and your CAO with the opportunity to choose the tools that work for your organization. Councils can change every four years and sometimes your entire direction changes which can be the same for the performance evaluation process. There is no right or wrong process or one that's perfect. What worked last year may not work this year depending on the complexities, so it's up to you and your CAO to customize the best performance evaluation model that works for everyone.

This new version of the Toolkit gives Mayors and Councils the tools and best practices to facilitate discussions with their CAO so that performance management is fair and effective, and the process is very easy for both parties. Using this Toolkit, the CAO and Mayor and Council can hold open conversations to assist in achieving a collective vision and reaching strategic goals for the success of the organization and the community.

For both parties, the Toolkit fosters:

- a foundation for good communication;
- an approach to dialogue and conversation that reduces misunderstandings;
- a process for setting annual work-related goals;
- a shared understanding of performance measures;
- a recognition of the CAO's achievements and assessment of what is being accomplished;
- an identification of performance gaps and proactive measures;
- a focus on aligning the CAO's goals with the strategic plan for the organization.

This Toolkit will support Mayors and Councils to work more effectively with their CAO, will shift Canadian practice to a higher level of professionalism, and will assist with the unique working relationships CAMA members must maintain with elected officials.

Please note that the reference to "Mayor and Council" in this document also includes Reeves, Wardens, Chairs, Heads of Council and elected officials.

Contact Jennifer Goodine, CAMA Executive Director (1-866-771-2262) admin@camacam.ca with your questions and comments.

**TIP: Elected and appointed leadership need to strategically work together in an anticipatory fashion to align the municipal organization for success.**

# Introduction

CAMA produced this Toolkit in recognition of the importance of the relationship between the City Manager, Town Manager, or Chief Administrative Officer (CAO) and Mayor and Council. The CAO is the administrative head of the municipality who ensures policies and programs are implemented; advises and informs Mayor and Council about the operation and affairs of the municipality; and carries out the duties described in legislation.

CAOs stand at the crossroads of municipal management and politics, and its their job to follow the direction set by the municipality's elected officials - and a high degree of trust between each party is required.

Municipal World's article, by columnist Dawn McCoy entitled "CAO performance evaluation" explains the many responsibilities of the CAO:

**"Consider this scenario. You are in charge of a multi-million dollar corporation with hundreds of employees. You have multiple stakeholders, all with an interest in how your organization meets their specific needs, many of which are not the same as each other's or your own. Your boss changes every four years and sometimes your entire direction changes, but it is not always clear what the new mandate is. In fact, you have multiple bosses, with different goals and ideas of what you should do and how you should do it. How do you know you are doing what you are supposed to do?**

**This is the reality of the Chief Administrative Officer, the only employee of the elected council in most municipal government organizations. Given all the complexities, how does the CAO navigate through this murky maze to make sure they are leading the organization in the direction Council wants to go? How does Council know if the CAO is actually implementing their mandate or how well their goals are being met?"**

In many Provinces and Territories, an annual CAO review is a requirement. However, even when it is not mandatory, it is advisable for Council to provide a yearly evaluation. For many municipalities, the annual performance evaluation is the key performance indicator of the effectiveness of the CAO's strategic management decisions and actions and the performance of the organization. Appraisals are Council's opportunity to officially tell the CAO, from their perspective, how well they are discharging their duties. It is the CAO's report card.

CAMA encourages a broader, more holistic understanding of performance conversations, which form part of **an ongoing process, not just an annual event.** It is important to ensure Council strategy and expectations of the CAO are clearly defined, so there is something to measure performance against. To learn more about the principles of performance evaluation click here.

Most Councils rely on the CAO to:

- be the connecting link between Council and municipal operations;
- implement the municipality's policies;
- assist Council in arriving at decisions and manage the efficient execution of those decisions by municipal staff;
- develop and use an appropriate decision making process;
- regularly review staff performance;
- maintain organizational health; and
- take all reasonable steps to run the organization professionally and within approved Council policies and the limits of government legislation.

This Toolkit will provide you with a Quick Reference Guide for each of the three steps in the process, but also a detailed step-by-step guide and checklist for the Mayor and Council when reviewing the CAO's self-evaluation, creating the *Final Performance Evaluation Report*, and the meeting with the CAO to discuss the results. The CAO has also been provided with their own guide for the process "CAO Performance Evaluation Toolkit - Guide for the CAO".

**TIP: It is imperative that CAOs and Councils are using a process that everyone sees the value of, and has confidence in.**

# How to Use This Toolkit – Mayor & Council

This Toolkit is meant to be a guide of best practices and guidelines for the Mayor and Council and the CAO to follow, however it is **flexible and customizable.** It is recommended that you customize the performance evaluation process for your organization and choose the specific components that work for you. It can be used for

- a CAO and Council that are developing a new process and it is their first time conducting a performance evaluation; or
- a CAO and Council that already has an existing process with specific templates that already work well but would like to add some other components and best practices.

As the first step, the CAO will provide a recommended process to the Mayor for consideration.

**CAO Reviews Documents , Completes Self-Evaluation and Information Package to Present to Mayor & Council**

**Mayor and Council Review the CAO's Self-Evaluation and Create a *Final Performance Evaluation Report***

**CAO, Mayor & Council Meet to Discuss and Sign *Final Performance Evaluation Report***

## What is Included in this Toolkit?

This Toolkit provides the following information:

- **Important Information on the Value of Performance Discussions.** A performance evaluation should be **an ongoing process - not an annual event**. There are some tips and best practices on the importance of setting up quarterly reviews with your CAO, developing a compensation framework when the CAO is hired, surveying stakeholders that interact with the CAO on a regular basis, and the possibility of hiring a third-party consultant to conduct a facilitated evaluation.
- **Quick Reference Guides:** A one-page Quick Reference Guide showing each step at-a-glance for each of CAMA's three-part process (for the CAO, Mayor and Council and the final performance evaluation meeting).
- **Details for the Mayor and Council's Deliverables for the CAO's Performance Evaluation.** A detailed step-by-step guide for the Mayor and Council's *Final Performance Evaluation Report* and meeting with the CAO.
- **Sample Best Practices.** The performance evaluation template included in this Toolkit is a best practice document to assist you in having quality discussions with your CAO around their performance and does not have a rating system. A sample mandate letter has also been provided as an option. The CAO will provide a recommendation on the process and metrics.
- **Mayor and Council Process Checklist.** A Mayor and Council Process Checklist to ensure you have included all steps of the CAO *Final Performance Evaluation Report* and are prepared for the meeting with the CAO.
- **Sample Timeline.** A sample timeline to be used as a guide, beginning in mid-August and finishing the first week of December to coincide with the calendar and budget year. This process can move at the pace set by the CAO and the Mayor and Council.

## What About the CAO's Process?

If you would like to review the detailed recommended process for the CAO's self-evaluation and preparation of the *CAO Information Package* for the Mayor and Council visit the **CAO Performance Evaluation Toolkit: Guide for the CAO**.

## Tips on Customizing Your Performance Evaluation Process

Every Council and their CAO is different and therefore the way that performance evaluations are conducted are going to be unique. The Toolkit is designed to provide you with foundational steps (the regular performance evaluation process) as well as optional steps (quarterly reviews, developing a compensation framework, and a stakeholder survey) which are outlined in detail in the next section. You may choose elements to start a simple process in your organization or pick additional pieces to add to your existing process. However, at the beginning of the process, the CAO will work with the Mayor and Council to determine the vision.

As a best practice, to facilitate a qualitative discussion during performance conversations with your CAO, you may consider using CAMA's performance evaluation template **without a rating system**, as a guide focusing on the specific annual Council and CAO goals for the evaluation period. You may also complete a mandate letter that outlines the annual expectations of a CAO of being a role model and good corporate leader, but also the specific expectations for the year based on the goals of Council and the CAO, approved by Council the previous year. These templates can be customized to suit your needs.

**The performance evaluation process starts and ends with the CAO** and he or she will initiate the process and both parties will decide on the template and performance metrics used for the evaluation. It is important for the Mayor and Council to take their time in reviewing the *CAO's Information Package* and prepare a *Final Performance Evaluation Report*. The end product is a meeting with the CAO, Mayor and Council to discuss the *Final Performance Evaluation Report* and set goals for the following year.

**TIP: A numbered rating system is not always helpful.**

**"Evaluating someone's performance is a complex process and reducing it to a scale of 1 to 5 helps neither the evaluated nor the evaluators. Some people are "hard graders" and others just check the top box. Some will use it to avoid providing specific, meaningful feedback. In our experience, rating systems reduce the amount of feedback provided to the manager, and often produce a muddled and confusing result without clear direction to the manager."**

*Source: ICMA article titled "A Better Way: The Facilitated CAO Performance Review"*

# The Value of Performance Discussions

Effective performance management and performance evaluation should improve communication and the employment relationship between CAOs and their Councils. This is a unique relationship in that there are a number of people involved in evaluating the performance of the CAO, even though Council as a body sets direction. The relationship is significantly more complex than a traditional one-to-one of supervisor to employee. While there may be similarities to Board of Director/Chief Executive Officer relationships, the municipal context has these differences:

- In many cases, provincial legislation sets the basis for the Council/CAO relationship.
- Elected officials may or may not have prior experience and training in the oversight and performance evaluation of a professional senior executive.
- Municipal compensation systems may provide financial incentives (i.e. an annual bonus) to drive/reward performance.

Both elected officials and municipal CAOs operate under daily scrutiny of the public and the media. Regular performance evaluations promote a high-performance organization that is better able to withstand that scrutiny. They also create a vision for Council for their mandates.

The key value to conducting a written performance evaluation of the CAO provides the following benefits:

- An opportunity to increase communication between the CAO and the Mayor and Council.
- The conversation gives the CAO an opportunity to identify goals that support his or her career objectives.
- Aligning the municipality's strategic goals with the CAO's goals supports the organization's excellence.
- The performance review of the CAO provides the Mayor and Council with a formal record of their performance conversation and appraisals of the CAO's achievement of agreed-upon goals, and of the organization's performance in achieving its goals.

Goal setting occurs at the start of an evaluation cycle and the key results are an important component at the end of the annual evaluation cycle. **CAO's need to be in sync with the expectations of Council and these should be articulated at the outset and generally discussed again every year at the evaluation.**

Performance evaluations show appreciation for and feedback on the work of the CAO. Through performance evaluation the CAO better understands the roles and responsibilities of the position. Evaluations:

- offer a prime opportunity for organizational feedback;
- recognize the challenges the CAO faces;
- allow elected officials to hear about the CAO's managerial style; and
- encourage appreciation for the need for succession planning; and discuss/clarify the future.

# An Ongoing Process - Not Just an Annual Event

The importance of regular conversations or "check-ins" throughout the year cannot be overstated. Building solid, respectful working relationships will advance everyone's interests and avoid having surprises arise over the course of the year and specifically at year-end. Regular performance conversations make it easier to link compensation to performance at the year-end performance evaluation.

### Setting Up Quarterly Reviews

Although this Toolkit is for **annual** Performance Evaluation Reviews, some municipalities set up **quarterly reviews** for a more formal approach to "checking in," which gives the opportunity to review/change goals that are no longer achievable due to new circumstances.

### Discussion with CAO on Compensation

During discussions about job descriptions, hiring, and performance evaluation, a compensation framework can be developed. When the Mayor and Council meet to discuss the *Final Performance Evaluation Report*, they may use the time to decide upon compensation. The Report identifies the level of performance satisfaction for the entire performance period. In addition to the ratings and executive summary of the *Final Performance Evaluation Report*, compensation decisions may be based on:

- the economic climate of the municipality and community;
- the general status of comparable compensation in the private sector of the community;
- compensation decisions for other employees of the local government; and
- a comparative salary review.

ICMA's Employment Agreement recommends the following options: an increase dependent upon the results of the performance evaluation in the form of salary and/or performance incentive and/or increase in benefits; the Consumer Price Index; compensation by percent each year; or by at least the average across the board increase granted to other employees of the Employer.

# Optional Steps

### Stakeholder Survey

Whether the municipality is small, medium, or large, there are components of performance evaluations that can elevate their effectiveness, such as a survey of stakeholders. Stakeholders include senior staff who report directly to the CAO and stakeholders identified by the CAO and confirmed by Mayor and Council.

This is an **optional step** in the performance evaluation; however, the review provides valuable information on how results are achieved and how the community perceives both the CAO and the municipality. Some evaluations call for a 30-minute interview with all stakeholders except for those stakeholders who provide feedback online. Conducting performance evaluations holds all those involved to professional standards and builds a community within the organization because all stakeholders involved are asked for input. This includes staff who report to the CAO, stakeholders who work with the CAO, and Mayor and Council. All participants in the Survey of Stakeholders must be assured that their input is confidential and that the results of interviews and surveys will be scrubbed to be non-attributable.

## Hiring a Third Party Consultant for a Facilitated Evaluation

The goal of the performance evaluation is to provide the CAO with meaningful feedback. As stated by ICMA in an article entitled "A Better Way: The Facilitated CAO Performance Review" -

> **"Meaningful feedback is a gift. It is critical to effective leadership in ensuring that a City Manager's actions align with the elected officials to whom they report."**

Sometimes Councils often find the process time-consuming, cumbersome, and not particularly effective. However, hiring a third party, such as a consultant, to work with the Mayor and Council to facilitate the process to ensure it is fair is a good best practice. A third party manages the evaluation process, acts as a neutral party to gather data from elected officials (and other evaluators), analyzes the data, and presents the findings to the CAO in a way that encourages growth.

For the CAO, it provides meaningful feedback, it clears the air if there are any issues identified by Council, it separates the message from the messenger, and it focuses on results-oriented opportunities. For the elected officials, it professionalizes the process, values all opinions around the table, makes the process easier with one person responsible for managing the evaluation from start to finish, and it creates clarity.

The cost to pay for a facilitator is minimal when considered alongside the benefits and should be recognized as the key to a successful CAO-Council relationship. Given the significant investment that you have made in your CAO, the number of staff and budgets that they are responsible for, and the importance of assessing and correcting course as needed, it can create huge cost-savings from avoiding breakdowns in the Council-CAO relationship and is the key to success.

> **TIP: It is not recommended that the Human Resources Department or any other employee be intimately involved in the process as it puts them in an awkward situation as they all report to the CAO. The City Clerk may be involved in the process on behalf of the Mayor and Council. If a consultant is hired a recommendation would be that they meet with the Sub-Committee and/or Council to do an orientation on the purpose of a performance evaluation.**
>
> *Source: ICMA article titled "A Better Way: The Facilitated CAO Performance Review*

# Principles of Performance Management

| Principle | Explanation |
| --- | --- |
| **Achieving Standards of Excellence** | Professional Chief Administrative Officers are essential for effective local government to operate with standards of excellence. |
| **Valuing Employee Relations** | **CAO performance evaluations are a way for Mayor and Council to recognize, appreciate, and evaluate their relationship with their employee.**<br><br>Mayor and Council may change more often than the CAO, so the performance evaluations offer a way to ensure all involved have clearly outlined understandings and expectations for the CAO. The best time to make those expectations known is during the annual evaluation.<br><br>Performance evaluations, when there is a good relationship between the CAO and the Mayor and Council, allow for a discussion about the performance of the whole organization. The performance evaluations are a tool to better inform and engage Mayor and Council with the CAO's work, and to recognize the challenges the CAO faces. In gaining such an understanding, Mayor and Council can better appreciate the effectiveness of the CAO's work and determine ways to strengthen their support of this work.<br><br>The relationship between Mayor and Council and the CAO ought to be front and center in any performance evaluation. Positive relationships, marked by respect, trust, and transparency will advance the achievement of organizational goals. |
| **Continuous Improvement Toward Achieving Organizational Goals** | **The foundation of a performance management system aligns goals and expectations for the CAO with overall organizational strategies.**<br><br>High performance organizations promote continuous improvement for the CAO and the organization, empowering both to achieve success. As long-term outcomes come within reach, standards of excellence can be redefined.<br><br>In some Provinces and Territories, the first goal is to meet legislative requirements that Council conduct regular CAO performance evaluations. Many jurisdictions have policies and by-laws in place that describe responsibilities and expectations towards performance evaluation of CAOs. Performance evaluation is a tool for organizational excellence. Legislative context enriches the process and provides additional tools in the toolbox that are specific to provincial and civic jurisdictions. |

| Principle | Explanation |
|---|---|
| **Effective Ongoing Communication** | **Positive working relationships are built and maintained with effective, ongoing communications.**<br><br>Communication is one tool in the working relationship between the manager and elected officials and is NOT a report card that is an end in itself. With ongoing communication between the manager and officials, nothing in the performance evaluation should come as a surprise; it should be a summary of previously held conversations.<br><br>The performance evaluation is also an opportunity for the Mayor and Council to better define their vision and their expectations. |
| **Performance Evaluation is a Process** | **Performance evaluation is a process that begins with a job description.**<br><br>CAMA's Toolkit divides the process into three cycles. Part 1 involves seven steps of gathering information and preparing the *CAO Information Package* for Performance Evaluation. Part 2 involves six steps for creating the *Final Performance Evaluation Report*, and Part 3 has three steps for reviewing the *Final Performance Evaluation Report*. |

**TIP: "I have never had a performance evaluation from Council. I have to base my actions going forward on day-to-day successes I can see myself and staff attain, and by trying to determine what goals and actions Council would like to see achieved by listening during their discussions."**

*- Chief Administrative Officer*

# Quick Reference Guides

## Part 1: The CAO's Process

### Reviewing Documents, Creating Information Package and Completing Self-Evaluation for the Mayor & Council

Note that your municipality may not have all the elements described in the process, but because this Toolkit is a **"flexible and customizable"** model, that is completely fine. Use the elements that you do have, and consider, as you read through, whether you'd like to investigate additional elements. As you work through Part 1, you will collect information to give to the Mayor and Council for their work in preparing the *Final Performance Evaluation Report* in Part 2.

**1.1**
Review Governance Requirements

**1.2**
Review Hiring Documents

**1.3**
Review Goals & Key Results

**1.4**
Review & Recommend Evaluation Template and Performance Metrics & Set a Timeline for the Process

**1.5**
Conduct the CAO Self-Evaluation

**1.6**
Pull the Data Together & Present the CAO Information Package to the Mayor

**1.7**
Post-Evaluation & Setting Goals for the New Evaluation Cycle

**1.1 Review Governance Requirements:** The CAO gathers and reviews all policies, by-laws, regulations, and acts that relate to or clarify the role of the CAO, or that Council must follow regarding performance evaluations of their CAO.

**1.2 Review Hiring Documents:** The CAO gathers and reviews the CAO job description, contract, and covenants (if any).

**1.3 Review Goals & Key Results:** The CAO gathers and reviews previously agreed-upon mandate letters, strategic goals, key result areas, the strategic plan, and/or Council priorities.

**1.4 Review & Recommend Evaluation Template and Performance Metrics & Set a Timeline for the Process:** After review, the CAO meets with the Mayor and recommends a performance evaluation template (included in this Toolkit or their own) to the Mayor and Council and the performance metrics that are used to rate performance. Several other questions are asked during this meeting. In addition, a timeline and a process are also agreed to collectively by both parties.

**1.5 Conduct the CAO Self-Evaluation:** The CAO uses the agreed upon Performance Evaluation template and metrics to conduct his or her self-evaluation prior to the Mayor and Council using the same evaluation template for their evaluation of the CAO. This self-evaluation is included in the Information Package.

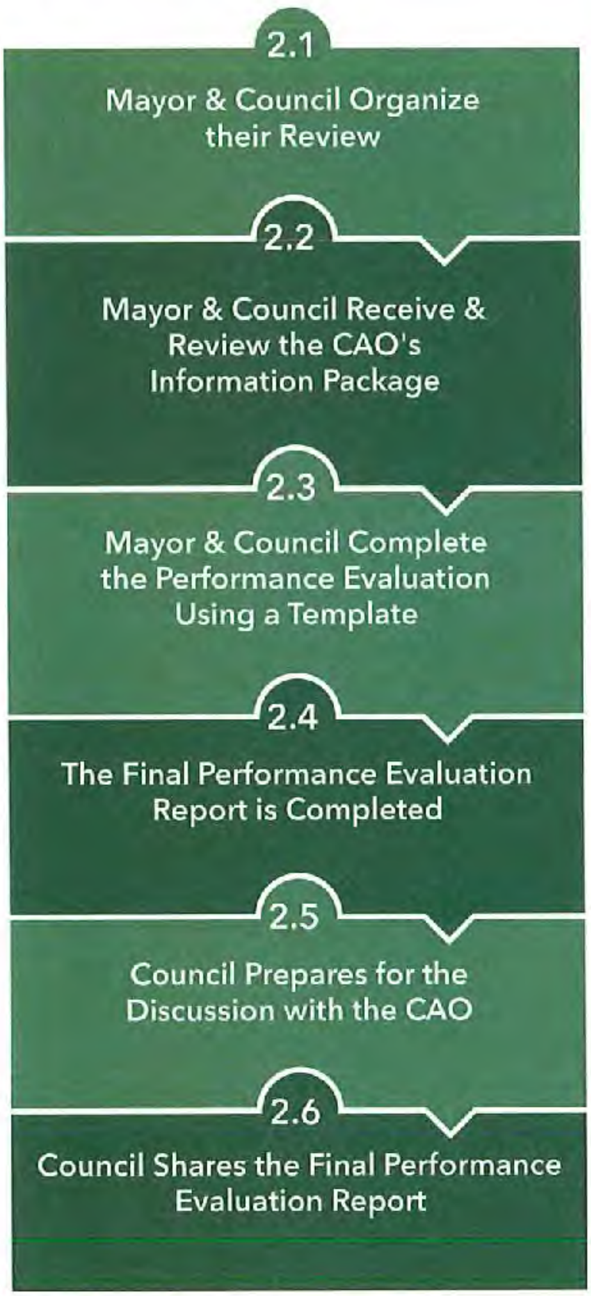
**1.6 Pull the Data Together & Present the CAO Information Package to the Mayor:** The CAO has completed a review of relevant documents, including any quarterly or periodic reviews, and prepares an Information Package to present to the Mayor to circulate to Council.

**1.7 Post-Evaluation & Setting Goals for the New Evaluation Cycle:** Following the joint meeting with the CAO and Mayor and Council to review and sign off the Final Performance Evaluation Report, the paperwork is completed for the Human Resources Department. The process then starts again with Council to set new strategic goals and key results for the coming year to be linked to the CAO's goals with the municipality's Strategic Plan and Council's priorities.

# Part 2: Mayor and Council's Process

## Creating the *Final Performance Evaluation Report*

Part 2 of the performance evaluation cycle occurs when Mayor and Council have received the *CAO's Information Package* which includes his or her self-evaluation.




**2.1 Mayor and Council Organize their Review:** Once a performance evaluation template and performance metrics are agreed upon by both parties, the task of gathering and assessing the data involves agreeing on how to get input from all members, whether to designate a committee of Council to lead the exercise and, whether assistance is required from a consultant. Confirming a timeline for the process is also important.

**2.2 Mayor & Council Receive & Review the CAO's Information Package:** The CAO's Evaluation includes all the background/ foundational data the CAO gathered as part of the package as well as the CAO's self-evaluation.

**2.3 Mayor & Council Complete the Performance Evaluation Using a Template:** This is the traditional step of the process wherein Mayor and Council rate the CAO's performance using the template that has been agreed upon by both parties.

**2.4 The Final Performance Evaluation Report is Completed:** Using the agreed template, the person responsible for compiling the information, gathers all the evaluations and written comments from each Council member and organizes the findings as per the process previously agreed on for capturing the rolled-up feedback in Step 2.1.

**2.5 Council Prepares for the Discussion with the CAO:** Things to be considered include the rules of feedback, the purpose and desired outcome of the performance evaluation discussion, and who is chairing the discussion.

**2.6 Council Shares the *Final Performance Evaluation Report*:** The *Final Performance Evaluation Report* is shared with the CAO, Mayor and Council to allow all parties time to review this document prior to the meeting to discuss it.

# Part 3: CAO, Mayor and Council Meet to Discuss the *Performance Evaluation Report*

**3.1**
Joint Review of the Final Performance Evaluation Report & Final Sign Off

**3.2**
Meet to Discuss New Goals for the Next Evaluation Cycle

**3.3**
A New Year: Begin the Performance Evaluation Cycle Again

**3.1 Joint Review of the *Final Performance Evaluation Report* & Final Sign Off:** An In-Camera/Closed meeting is held with the Mayor, Council and CAO to have a conversation between both parties to discuss the final report. The conversation uses constructive feedback to present and discuss the collective comments from the Mayor and Council. The CAO, Mayor and Council sign off on the document.

**3.2 Meet to Discuss New Goals for the Next Evaluation Cycle:** After the CAO's performance evaluation is complete, it's important for Council to set new strategic goals and key results for the coming year, which link to the CAO's goals, the municipality's Strategic Plan and Council's priorities. This may take a minimum of two meetings with the first meeting being to discuss Council's vision and strategic goals/priorities, and the second meeting being to review and approve the CAO's goals for the coming year based on that vision. If a mandate letter is part of the performance evaluation process it should be completed at this meeting.

**3.3 A New Year: Begin the Performance Evaluation Cycle Again:** Begin the performance evaluation cycle again.

**"As Mayor (and Chair) of the performance committee, the process was discussed ahead of time with Councillors and the CAO. The results of the formal process survey were aggregated and agreed with the CAO so that the range of results could be seen. Results where there was significant agreement as well as those areas with a wide range of responses were discussed. A cumulative report was filed with opportunity for further discussion."**

*- Mayor*

# Part 2: Mayor and Council's Process

## Creating the Final Performance Evaluation Report

| Step # | Step and Explanation |
|---|---|
| 2.1 | **Mayor & Council Organize Their Review** |

**Part 2 of the performance evaluation cycle occurs when Mayor and Council have received the *CAO's Information Package* which includes his or her self-evaluation.**

### Pre-Meeting Between the CAO and Mayor

Prior to receiving the *CAO's Information Package*, the CAO will meet with the Mayor to present a recommended performance evaluation template and metrics, and set a timeline for the entire performance evaluation process with the Mayor and Council. **Setting up a calendar from the start will help to keep the process on schedule and ensure it is not only started, but that it is also completed.** The following questions and topics should be discussed during this meeting between the CAO and the Mayor:

- Who will be the Chair of the CAO Performance Evaluation?
- Will a third party such as a consultant be hired to work with the Mayor and Council to ensure the process is fair?
- Will there be a Sub-Committee of Council that will prepare the *Final Performance Evaluation Report* and collect the responses from each member of Council? Or work with the consultant to prepare the *Final Performance Evaluation Report*?
- A recommended performance evaluation template and metrics will be presented to the Mayor by the CAO for consideration.
- Any compensation clauses noted in the CAO's employment contract and how they relate to his/her performance evaluation.
- The option of conducting a stakeholder survey as part of the review.
- Creating a timeline/calendar that includes deadlines for the entire process and some additional dates to start the process of setting goals for the next year.

### Mayor's Follow-Up with Council (Post-Meeting with the CAO)

Following the meeting with the CAO, the Mayor needs to contact the City Clerk to set up a Private/In-Camera meeting with Council to determine how to manage the performance evaluation process. Following are some questions for discussion that can form the Agenda for the meeting:

- **Chair of the CAO Performance Evaluation.** Typically, the Mayor takes the lead on the CAO's Performance Evaluation unless he/she appoints a Sub-Committee of Council to lead the process where another Councillor would be appointed as the Chair.

| Step # | Step and Explanation |
|---|---|

- **Third Party Consultant/Facilitator.** Having a third-party consultant/facilitator that has expertise in performance evaluations is advantageous, however there is a cost that goes with it. Having a consultant and neutral party professionalizes the process, ensures all opinions are valued around the table, makes the process easier with one person responsible for managing the evaluation from start to finish, and it creates clarity. If a consultant is hired a recommendation would be that they meet with the Sub-Committee and/or Council to do an orientation on the purpose of a performance evaluation.

  **Important Note:** Council often leans on the Human Resources Director because of their expertise. However, because the CAO is an employee of the Mayor and Council, the role of the CAO is unique. The Human Resources Department reports to the CAO and would therefore be in an awkward position if asked to manage the CAO's performance evaluation.
- **Sub-Committee & Preparation of *Final Performance Evaluation Report.*** Will there be a Sub-Committee of Council that will prepare the *Final Performance Evaluation Report* and collect the responses from each member of Council? Or work with the consultant to prepare the *Final Performance Evaluation Report*? Options that could be considered for those responsible for completing the *Final Performance Evaluation Report* Committee include: the Mayor, Council, a Committee of Council, a consultant, or a combination of the above. The Mayor and Council also need to agree on the process for capturing agreement of their feedback and developing the *Final Performance Evaluation Report* (rolled up feedback).
- **Performance Evaluation Template and Metrics.** The CAO has already presented a recommended performance evaluation template and metrics to the Mayor. The Mayor will make the decision on the template or forward it to the Sub-Committee. It is not recommended that the entire Council be involved in choosing the template. There must be a consensus on this before the process starts as both parties (CAO and Council) must use the same form. **It is important that all Council members complete the template and participate in the CAO's performance evaluation.**
- **Compensation Framework.** The CAO has advised the Mayor of any compensation clauses noted in his/her employment contract and how they relate to his/her performance evaluation. This needs to be taken into consideration during the performance review.
- **Optional Step: Surveying Stakeholders.** Does Council wish to undertake a survey of stakeholders which would include the CAO's direct report staff and any stakeholders he/she identifies in the community.
- **Creating a Timeline/Calendar.** A timeline should be confirmed that includes the following:
  - A deadline for the *CAO's Information Package* including the self-evaluation to be submitted to Council.
  - A time the CAO can meet with the Mayor and/or consultant to review the *CAO's Information Package*.
  - A date that the *CAO's Information Package* will be sent to all Council members.
  - A deadline when Council's evaluations must be completed and submitted to the Mayor/Sub-Committee and/or consultant.
  - A deadline when the *Final Performance Evaluation Report* must be completed by the Mayor/Sub-Committee and/or consultant.
  - A date for the review of the *Final Performance Evaluation Report* by Council.

| Step # | Step and Explanation |
|---|---|

- o A final date for an In-Camera/Private Council meeting with the CAO to discuss and sign the *Final Performance Evaluation Report*.
- o Some additional dates should also be set with the City Clerk's Office to start the process of setting goals for the next year.

**Post-Meeting with the CAO**

Following the Council meeting, the Mayor has a second meeting with the CAO to advise him/her of the decisions made by Council with respect to the performance evaluation process. Following is a list of the information that the CAO needs to know before he/she can proceed with their self-evaluation and completing the CAO *Information Package* for the Mayor and Council:

- Who will chair the process?
- Will Council be hiring a consultant to facilitate the process? If not, who will be overseeing the process?
- Who will be preparing the *Final Performance Evaluation Report* and how will the feedback be captured?
- What is the final performance evaluation template and metrics that will be used by both parties?
- Will there be a stakeholder survey?
- What is the final timeline/calendar that has been confirmed for the process?

It is the responsibility of the Mayor and City Clerk to ensure that the timelines are met to keep this process moving forward. If it is the decision of the Mayor and Council to hire a third party to assist with the CAO's performance evaluation, this should be done as soon as possible following the municipality's procurement process.

## 2.2 Mayor & Council Receive & Review the *CAO Information Package*

The CAO may meet with the Mayor and/or consultant (Chair of Sub-Committee) to review the *CAO Information Package* before it is circulated to all members of Council.

If the CAO did not make enough copies for the *CAO Information Package* for each member of Council, the Mayor's Office will complete this task. A blank template should also be kept for the *Final Performance Evaluation Report*.

Each Council member receives the *CAO Information Package*. It includes all the background/foundation data gathered by the CAO as pertinent for their evaluation. In addition, the CAO's self-evaluation is provided for review, and a blank performance evaluation template that was agreed upon by both parties is provided for completion by each Council member.

| Step # | Step and Explanation |
|---|---|
| | Each Council member should review the following documents included in the *CAO Information Package* and ask the following questions as they complete the evaluation template:<br>• Governance documents including any legislation, municipal policies, and by-laws describing the CAO job descriptions, duties, powers or the performance evaluation process. Are there any new pieces of legislation or municipal by-laws that have triggered the need for change?<br>• Do any aspects of the CAO's job description or employment contract/offer letter need to be changed?<br>• In the CAO's self-evaluation, how well has he/she met the goals and key results defined at the beginning of the performance evaluation cycle? |
| 2.3 | **Mayor & Council Complete the Performance Evaluation Using a Template**<br>This is the traditional step in the performance evaluation process. In addition to reviewing the CAO's self-evaluation, the Mayor and each Council member rate the CAO's performance using the template and metrics that have been agreed upon by both parties.<br>Following completion, each copy is turned over to the person responsible for compiling the information into the *Final Evaluation Report* (Mayor, Chair of the Sub-Committee or the consultant). |
| 2.4 | **The Final Performance Evaluation Report is Completed**<br>Using the agreed template, the person responsible for compiling the information, gathers all of the evaluations and written comments from each Council member and organizes the findings as per the process previously agreed on for capturing the rolled-up feedback in Step 2.1. The report will show areas of excellence as well as areas for improvement. The written comments are grouped into thematic areas and appended to the *Final Evaluation Report*. |
| 2.5 | **Council Prepares for the Discussion With the CAO**<br>Upon receipt of the *Draft Final Performance Evaluation Report* from the Sub-Committee or consultant, the Mayor and Council will meet in an In-Camera/Closed meeting to discuss the report and the CAO's self-evaluation.<br>The Mayor and Council decide how feedback will be discussed, how one-of-a-kind comments will be handled, who will chair the performance evaluation conversation, and the purpose and desired outcome of the meeting with the CAO. Council also determines any salary adjustment (merit increase) based on the overall performance and any compensation clauses in the CAO's employment contract/offer letter. |

| Step # | Step and Explanation |
|---|---|
| | Any final changes are noted and a few days to a week are allowed for preparation of the *Final Performance Evaluation Report* prior to the meeting with the CAO. |

**TIP: Council's philosophy should be to help the CAO succeed. If they succeed, then staff succeeds; if administration succeeds then Council succeeds.**

## Delivering Positive and Constructive Feedback in the Written Narrative and Discussion

It has been said of performance evaluations that when 'an atmosphere of trust, respect and transparency characterizes the relationship between CAO, Mayor and Council, the CAO's performance can have a direct and lasting impact on the ability of Council to carry out its mandate.' Sometimes constructive feedback is necessary, and there are tips to do this effectively. The earlier the better is a good rule. If the feedback did not come with the actual event, and has accrued through the performance evaluation period, then there are some suggestions to keep in mind.

- Don't use the delivery of the constructive feedback to vent.
- Accentuate the positive. If there is a constructive comment, there must be a positive outcome that is being sought. What is it?
- Ask how the problem originated–it helps to get to the root of the problem.
- Involve the CAO and Mayor and Council in the solution.

For positive feedback, it is equally important to be fair and realistic. As noted in the quote below, too much positive feedback can be deceiving. A better approach is to coach the CAO on the type of appropriate and effective behaviour that could be exercised more often.

**A Consultant Describes an Avoidable Feedback Scenario**

**[There are a] number of instances wherein I have been called by a Council concerned about its deteriorating relationship to the CAO and yet having just polished off another performance assessment proclaiming that the CAO is soon to walk on water. The CAO is of course stunned by one result/sentiment or the other and most likely both. It is akin to the hockey coach receiving a very positive endorsement just prior to the fateful call (sometimes by the same fellow) announcing that the team in its wisdom felt that a change was needed, hard to fire the team, need a different voice ...**

*(Cuff, George. FCMC. 2015. Governance Zone: What Results? p.1)*

## 2.6 Council Shares *Final Evaluation Report*

The *Final Performance Evaluation Report* is circulated to all participants. The CAO, Mayor and Council should have time to review the Final Evaluation Report prior to the meeting to discuss it.

# Part 3: CAO, Mayor and Council Meet to Discuss the Performance Evaluation

| Step # | Step and Explanation |
|---|---|

3.1

### Joint Review of the *Final Performance Evaluation Report* & Final Sign Off

The Mayor, Council and CAO have received a copy of the *Final Performance Evaluation Report*. An In-Camera/Closed meeting is held to have a conversation between both parties to discuss the final report. The conversation uses constructive feedback to present and discuss the collective comments from the Mayor and Council on the *CAO's Information Package* and self-evaluation.

- How well did the CAO's performance align with Council's Strategic Goals?
- What were the overall ratings (if a rating system was used)?
- What discussion arises from the final notes? Are there any themes that emerged?

**TIP: Maintaining an open communication is important to the success of the municipality. The evaluation should be a conversation between Council and the CAO, not just Council offering their opinions.**

The CAO, Mayor and Council sign off on the document and the CAO is responsible for submitting a copy of the report and his/her self-evaluation to the Human Resources Department to be placed in his/her personnel file. The CAO is also responsible for completing any paperwork (signed by the Mayor) to be submitted to the Payroll Department for any compensation related to the performance evaluation.

3.2

### Meet to Discuss New Goals for the Next Evaluation Cycle

After the CAO's performance evaluation is complete, it's important for Council to set new strategic goals and key results for the coming year, which link to the CAO's goals, the municipality's Strategic Plan and Council's priorities. These new goals can be part of a mandate letter if you and the CAO choose to use this tool.

Certain goals set last year may remain unchanged, as they are ongoing strategic goals for the municipality and therefore the CAO. Other goals may be new, so this is the time to discuss all the chosen goals for the coming year considering of their:

- Appropriateness for the municipality;
- Advancing the CAO's professional goals and interests; and
- Potential for enhancing the relationship between the CAO, Mayor and Council, staff, stakeholders, and the community.

| Step # | Step and Explanation |
|---|---|

One effective way of setting goals is to use the S.M.A.R.T goal concept. A variety of interpretations of the SMART acronym have been used since the 1960s. George T. Doran's interpretation (1981) is often considered to be the foundational one and is described below.

| | |
|---|---|
| **S** | Specific: Target a specific area for improvement. |
| **M** | Measurable: Quantify, or at least suggest, an indicator of progress. |
| **A** | Assignable: Specify who will do it. |
| **R** | Realistic: State what results can realistically be achieved given available resources. |
| **T** | Time-related: Specify when the result can be achieved. |

**Setting Achievable Goals**

**...a good performance review would [include a] discussion regarding whether or not those goals [from last year] were set in a moment of euphoria (i.e., filling all the potholes) or actually achievable.**

*(Cuff, George B. 2015 Governance Zone: What Results? p.2)*

This may take a minimum of two meetings with the first meeting being to discuss Council's vision and strategic goals/priorities, and the second meeting being to review and approve the CAO's goals for the coming year based on that vision.

3.3

## A New Year: Begin the Performance Evaluation Cycle Again

Begin the performance evaluation cycle again.

# Mayor & Council's Checklist for the CAO's Performance Evaluation

## Mayor & Council Organize Their Review.

- **First Meeting with CAO.** The Mayor has met with the CAO to discuss the entire performance evaluation process (with the Mayor and Council) including a timeline. The CAO has also presented his/her recommended performance evaluation template and metrics for consideration. As noted in Step 2.1 there are a number of questions that the Mayor has to follow-up on with Council before the process can begin.

- **Contact the City Clerk.** The Mayor has contacted the City Clerk to set up a Private/In-Camera meeting with Council to determine how to manage the CAO performance evaluation process.

- **Meeting with Council.** The Private-In-Camera meeting is held with Council to discuss the questions outlined in 2.1 above.

- **Second Meeting with the CAO.** Following the Council meeting, the Mayor has a second meeting with the CAO to advise him/her of the decisions made by Council with respect to the performance evaluation process. See the list of questions under "Post-Meeting with CAO" in Step 2.1 above.

- If it is the decision of the Mayor and Council to hire a third party to assist with the CAO's performance evaluation, this should be done as soon as possible following the municipality's procurement process.

- **Optional Step.** The Mayor/consultant conduct a stakeholder survey if this is the decision of Council.

## Mayor & Council Receive & Review the CAO Information Package

- **Third Meeting.** The Mayor and/or Consultant (Chair of the Sub-Committee) have met with the CAO to review the *CAO Information Package* before it is circulated to all members of Council.

- If the CAO did not make enough copies for the CAO Information Package for each member of Council, the Mayor's Office must complete this task. A blank template has also been kept for the *Final Performance Evaluation Report*.

## Mayor & Council Complete the Performance Evaluation Using a Template

- The *CAO Information Package* has been circulated to all members of Council with a request to complete the template by a deadline.
- Completed performance evaluations from all members of Council have been submitted to the person responsible for compiling the information into the *Final Evaluation Report* (Mayor, Chair of the Sub-Committee or the consultant).

## The *Final Performance Evaluation Report* is Completed

- The draft *Final Performance Evaluation Report* has been completed.

## Council Prepares for the Discussion with the CAO

- The Mayor and Council meet in an In-Camera/Closed meeting to discuss the Draft *Final Performance Evaluation Report* and the CAO's self-evaluation. At this meeting, the Mayor and Council decide how feedback will be discussed, how one-of-a-kind comments will be handled, who will chair the performance evaluation conversation, and the purpose and desired outcome of the meeting with the CAO. Council also determines any salary adjustment (merit increase) based on the overall performance and any compensation clauses in the CAO's employment contract/offer letter.

## Council Shares Final Evaluation Report

- Any final changes to the Draft *Final Performance Evaluation Report* have been made and the Mayor, Council and CAO have received a copy of the Final Performance Evaluation Report.

## Joint Review of the *Final Performance Evaluation Report* & Final Sign Off

- An In-Camera/Closed meeting is held to have a conversation between both parties to discuss the final report.
- The CAO, Mayor and Council sign off on the document (which is submitted to the Human Resources Department by the CAO) and the CAO has also provided the Mayor with any paperwork for signature for any compensation related to the performance evaluation.

## Meet to Discuss New Goals for the Next Evaluation Cycle

- **Setting New Goals.** Dates have been set for two more Council meetings to set new strategic goals and key results for the coming year which link to the CAO's goals with the municipality's Strategic Plan and Council's priorities. These new goals can be part of a mandate letter if the CAO and Mayor and Council choose to use this tool.

**With the new performance evaluation cycle typically starting in January, it is important to have quarterly reviews in March and June or at least one review prior to the annual review.**

# CAO Performance Evaluation Timeline

**The CAO Performance Evaluation process can move at the pace set by the CAO and the Mayor and Council and the Council meeting schedule. Below is an example of a process based on the calendar year that begins in mid-August and ends the first week of December.**

### August 15
**Process Starts:** CAO reviews documents for *CAO Information Package* prior to meeting with the Mayor.

### September 1
CAO meets with Mayor to discuss the Performance Evaluation Process with a recommended template and a timeline.

### September 15
Mayor meets with Council to discuss the CAO Performance Evaluation Process and agrees on a template and timeline.

**Stakeholder Survey (Optional Step)**
If the Mayor and Council decide to do a Stakeholder Survey, it should be started so the results are ready to be included with the *CAO Information Package* that is circulated to Council.

### September 30
Mayor meets with CAO to advise of Council's decisions. The CAO submits the *CAO Information Package* to the Mayor (and meets with the Mayor or and/or Consultant), and the package is sent to Council.

### October 15
Deadline for the Mayor and Council to complete the CAO Performance Evaluation Template.

### October 31
The Draft *Final Performance Evaluation Report* is finalized and considered by the Mayor and Council along with the CAO's self-evaluation.

### Process Ends
*Final Performance Evaluation Report* is shared with the Mayor, Council & the CAO prior to a joint meeting & final sign off.

### New Evaluation Cycle Begins
Council meetings are held to finalize new strategic goals, priorities with key results for the next year along with the CAO's goals.

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Administrative Excellence

**This is an example of a CAO Performance Evaluation template that the CAO will complete and submit to Council prior to them completing their evaluation. Each member of Council will also complete this template separately and then the Final Evaluation Report is completed and presented to the CAO. Please modify this template to suit your municipality's requirements.**

# CAO Performance Evaluation

| | |
|---|---|
| Name of Chief Administrative Officer | |
| Evaluation Period | |
| Name of Elected Official | |

An annual performance evaluation should be an important part of the relationship between Council and the CAO, and ultimately the success of the municipality. The main purpose is to have an informal discussion about the past year.

**Evaluation Principles:**

- The approach to the CAO evaluation should be in a positive manner with the broad objective of improving the organization and positively impacting the CAO, Council and City staff.
- All written and oral comments regarding the performance evaluation of the CAO are strictly confidential.
- The evaluation should be conducted in an honest and fair manner. One should not permit feelings of personal likes or dislikes to enter the evaluation. Don't let one single incident make such a vivid impact that you lose sight of the total picture. All comments should be objectively based upon facts and events during the past reporting period.
- All components of the evaluation such as comments and conclusions must be able to be substantiated if required.
- The evaluation process should be conducted in a manner that provides for and promotes open and honest dialogue.
- The CAO should feel that he/she has been adequately included in the process.

Prior to completing the evaluation, take a few minutes to ask yourself the following questions and make some brief notes, including specific examples:

- ✓ How are things going?
- ✓ What has the CAO done well?
- ✓ What could have been done better?
- ✓ Are we on track?
- ✓ What could Council do to help?
- ✓ What could the CAO do to make the organization better?

## Evaluation of Specific Annual Council and CAO Goals for Evaluation Period (As Outlined in the CAO's Mandate Letter)

Referencing the specific annual Council and CAO goals listed in the CAO's Mandate Letter from last year's review, please outline your success in achieving the goals and likewise identify any issues/roadblocks that prevented you from achieving your goals.

| Goal | Results Reported by the CAO | Comments From Mayor & Council |
|---|---|---|
| Goal #1 | | |
| Goal #2 | | |
| Goal #3 | | |
| Goal #4 | | |
| Goal #5 | | |
| Goal #6 | | |

## CAO Personal Annual Development Plan

| Development Objective | Specific Experience/Course/Activity | Target Completion Date | Completed Yes/No |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |

## Evaluation Focus

The main areas to be addressed during the evaluation will be:

| Leadership & Relationships | CAO Comments | Mayor & Council Comments |
|---|---|---|
| Leadership Style | | |
| Relationship with Mayor and Council | | |
| Leadership to the Organization and Staff:<br>• Does there seem to be a reasonable degree of mutual support and respect?<br>• Does the employee morale seem to be positive?<br>• How is the retention of employees? | | |
| Relationships to the Community and External Stakeholders | | |

# Questions

| Question | CAO Comments | Mayor & Council Comments |
|---|---|---|
| Corporate Leadership. Has the CAO accomplished the Annual Corporate Leadership Expectations outlined in the Mandate Letter? | | |
| Annual Goals. Has the CAO accomplished the Specific Annual Council and CAO Goals (outlined above)? | | |
| Strengths. Based on your overall evaluation of the CAO, what areas would you list as his/her strong points as a manager? | | |
| Improvements. Based upon your evaluation, what areas would you suggest the CAO work on to improve his/her skills to be more effective in specific areas or situations? | | |

## Specific Annual Council and CAO Goals for the Coming Year

What are the new strategic goals and key results (which link to the CAO's goals, the municipality's Strategic Plan, and Council's priorities) for the coming year? A mandate letter outlining the annual expectations and annual goals may also be completed if you and Council choose to use this tool.

| Goal | Outcomes/Measures | Target Completion Date |
|---|---|---|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

Mayor's Signature
Date

CAO's Signature
Date

Attachment D

# CAPE BRETON REGIONAL MUNICIPALITY

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**POSITION DESCRIPTION:** **CHIEF ADMINISTRATIVE OFFICER**

**DEPARTMENT:** **OFFICE OF THE CHIEF ADMINISTRATIVE OFFICER**

## JOB SCOPE:

Reporting to the Mayor and Council, the CAO provides the cornerstone leadership for all aspects of business and services. The CAO is expected to facilitate the development of a clear mission and vision in line with Council directions; implement a community based strategic plan; build a strong and effective Senior Management Team; challenge the organization to be innovative and responsive; and improve the efficiency and effectiveness of programs and services delivered to the community. The CAO is expected to be a visible leader and to proactively develop critical internal and external relationships. Responsible for advising the Mayor and Council on all matters relative to Cape Breton Regional Municipality (CBRM) operations and implementing Council policies.

## MAIN FUNCTIONS:

### Leadership

- Provide leadership and direction to the organization to promote the effective and efficient delivery of CBRM services;
- Create within the Senior Management Team an openness to new ideas, encouraging innovation and implementing a culture of accountability for actions and results - evaluating outcomes and determining the most effective use of resources;
- Provide inspiring leadership through communication, accessibility and a shared vision - setting a positive tone for CBRM by suggesting new ways for the organization to embrace and participate in change in a positive and constructive manner;
- Co-ordinate initiatives with the Mayor to maintain a clear focus on Council vision and direction as well as priority setting for key projects;
- In conjunction with the Senior Management Team, establish business plans and priorities to implement Council's vision and directions;
- Set a visible and positive leadership example in order to promote empowerment of employees through coaching, mentoring, two-way communications and delegation of decision making responsibility; take necessary steps to anticipate impact of changes and to identify and remove barriers;
- Act as the chief policy advisor to the Mayor and Council and provide Council with advice based on professional standards and best practices;
- Provide leadership in the on-going identification and tracking of "best practices" (including benchmarking of other municipalities) and latest technology; make recommendations for application to support continuous improvement efforts.

## Management

- Oversee the day-to-day operations and procedures of CBRM under policy direction of Council and in accordance with current legislation and regulations;
- Consolidate and review annual work plans and capital and operating budgets with recommendations to Council for approval;
- Establish procedures to monitor the performance of CBRM against plan / budget, identifying and correcting as necessary variances from plan / budget.
- Ensure that all high risk, complex situations with potential liability for CBRM are reviewed and monitored on an ongoing basis;
- Conduct regular reviews and assessments of the programs, services and organization structure of Departments using best practice research, evaluating effectiveness of the allocation of responsibilities and authorities, and ensure adequate measurement systems are in place;
- Establish procedures to optimize financial resources, exercise financial control and conduct ongoing reviews on CBRM's financial position to ensure expectations are being achieved.

## Communications

- Establish regular formal and informal communication processes with the Mayor and members of Council regarding all key issues.
- Provide comprehensive advice and reports on CBRM operations and issues to Council, Council Committees and Community representatives / partners as required.
- Ensure that Council is informed of all high risk, complex situations that have potential liability for CBRM.
- Communicate Council's directions and priorities to members of the Senior Management Team.
- Deliver regular periodic briefings of CBRM operations and results to ensure that employees across CBRM can gain an appreciation of the "big picture" – enhanced employee engagement across the organization.
- Develop and maintain a contact network covering:
    - Citizen associations / rate payers groups;
    - Key Community Stakeholders and representatives of development, industry, and trade and professional associations;
    - Counterparts in other municipalities; and
    - Federal and Provincial government officials at the policy and working levels.

## MINIMUM QUALIFICATIONS:

### Education and Experience:

- A degree from a recognized university in business or public administration or a Masters in Public Administration or related discipline or equivalent combination of education and experience
- Extensive experience at a senior level in municipal administration
- Exceptional communication, leadership and interpersonal skills
- Superior knowledge of local government organization and issues and a thorough understanding of the roles of Council and Administration in the municipal strategic and corporate management process.

## CORE COMPETENCIES

### Strategic Orientation
The ability to link long-range vision and concepts to daily work. Strategic orientation moves from understanding business fundamentals and strategies to a sophisticated awareness of the impact of the external environment on strategies and how external factors affect choices.

### Shaping the Organization
The ability to work effectively within structures, stakeholders and relationships within CBRM. The ability to identify the decision-makers and the individuals who can influence them and work with them to achieve objectives. The ability to predict how new events or situations will affect individuals and groups both within and external to CBRM and to utilize that knowledge to achieve the organization's objectives.

### Leadership
The ability to create and communicate a vision and engage others in its achievement. It is the ability to demonstrate behaviours that model and support the organization's aspirations and values and ensure its success.

### Leading Change
The ability to initiate, facilitate or implement change. Helping staff and stakeholders understand what the change means to them, building a shared vision and providing the ongoing guidance and support which will generate and maintain enthusiasm and commitment to the change process.

### Political Acuity
Dealing with the culture of CBRM. Navigating the formal and informal channels and networking with Council, the Senior Management Team, management groups, the media and the community.

### Innovation
An effort to enhance performance by being creative, promoting new ideas and introducing new solutions or processes.

### Communication
High degree of interpersonal skill, tact and diplomacy. Ongoing contact and dialogue with members of Council and various stakeholders at all levels. External contact with Community stakeholders and partners, the provincial and federal governments, the media and related organizations to provide and exchange information and solve problems. Able to adapt and tailor the conversation / presentation to a variety of audiences and contexts.

### Relationship Building
Establishing, building, and maintaining strong and reciprocal relationships and a network of contacts to keep a pulse on CBRM's, political and internal issues and to make informed decisions. Identifying who to involve and when and how to involve them in order to accomplish objectives and minimize obstacles.

**Partnering**
Creating an organizational environment that is open to alliances and attracting partnerships. Able to strategically identify and then approach potential partners – understands "what's in it" for the other partner. Negotiating and managing the strategic nature of alliances and determining when adjustments, fine tuning or termination of partnerships is required.

**Customer First Orientation**
A desire to identify and meet/exceed the requirements of both internal AND external customers / clients. Clear emphasis on service to customer groups:

- Recognizing the variety of "customers" within CBRM and at all levels of the organization and accommodating their diverse needs;
- Recognizing the variety of external customers including residents, community groups and other stakeholders.

**Results Orientation**
The desire or drive to achieve or surpass identified goals. Establishes performance objectives and measures to continuously improve performance and the standard of excellence across CBRM. Includes innovative or entrepreneurial behaviours.

**Holding People Accountable**
Ensuring others meet objectives and expectations in an appropriate and effective manner. Ensuring the performance management process is conducted throughout the year. Provides clear direction, appropriate tools, resources and authority to support success.

**Fiscal Accountability**
The ability to effectively manage and optimize human, financial and physical resources, undertake qualitative and quantitative measurement, planning and control of resources to maximize results.

**Teamwork**
Being part of a team and working co-operatively with others. "Team" is broadly defined as any task or process-oriented group of individuals working towards a common goal.

**Cape Breton Regional Municipality**
**320 Esplanade**
**Sydney, NS B1P 7B9**

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**To:** Council

**Submitted by:** Mayor Cecil P. Clarke

**Date:** March 18, 2025

**Subject:** Chief Administrative Officer Position

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Dear Council,

During the budget deliberations, the status of the Chief Administrative Office (CAO) position was raised as to process and next steps.

Regardless of the process Council chooses to select a full time CAO, I would recommend Council consider a new arrangement for the type of employment. Specifically, to replace indeterminant employment with a contract. This would bring the CBRM in alignment with common practice of larger municipalities.

A fixed-term contract with renewal or extension options can limit severance costs and provide needed flexibility for Council and the successful candidate.

As indicated in the comparative data table below, the CBRM's CAO salary is below that of other comparable municipalities as highlighted in the table below. The salary has been confirmed within the 2025-26 budget, and I recommend it stay the same for that duration.

| **Comparisons** | | | |
|---|---|---|---|
| **Municipality** | **Population** | **Year** | **Salary** |
| Brantford, Ontario | 104,000 | 2023 | $255,838 |
| Cape Breton Regional Municipality | 109,945 | 2025 | $232,721 |
| Charlottetown, Prince Edward Island | 40,500 | 2023 | $244,500 |
| Chatham-Kent, Ontario | 103,998 | 2022 | $259,806 |
| Halifax, Nova Scotia | 530,167 | 2024 | $292,228 |

| | | | |
|---|---|---|---|
| 5aanich, British Columbia | 117,735 | 2022 | $289,880 |
| 5t. John's, Newfoundland and Labrador | 110,000 | 2024 | $254,824 |

**Recommendation:**

That Council adopt a contract-based employment agreement when appointing a CAO with a 5-year fixed-term contract with a three-year renewal option; and

Council confirms the remuneration at same salary and benefits as presented in the 2025-26 budget.

**Appendix A – Chief Administrative Officers of the CBRM**

| | | |
|---|---|---|
| 1. | Jerry Ryan | Provincial appointment |
| 2. | Marie Walsh | Interim CAO Council direct appointment |
| 3. | Micheal Merritt | Recruitment firm to Council |
| 4. | Marie Walsh | Interim CAO Council direct appointment |
| 5. | Marie Walsh | Council direct appointment |
| 6. | Demetri Kachafanas | Interim CAO Council direct appointment |

# Statement of Revenue

**January 31, 2025**

| Revenue | Year To Date Assigned | 10 Month Budget | 10 Month Budget Variance | Annual Budget | Annual Budget Remaining |
|---|---|---|---|---|---|
| Total Taxes | 106,586,488 | 105,227,081 | 1,359,407 | 126,272,494 | 19,686,005 |
| Total Federal Government | 2,751,862 | 2,751,862 | - | 3,302,234 | 550,372 |
| Total Federal Government Agencies | 767,769 | 767,769 | - | 921,323 | 153,554 |
| Total Provincial Government | 1,743,259 | 1,743,259 | - | 2,091,911 | 348,652 |
| Total Provincial Government Agencies | 3,552,940 | 3,447,610 | 105,330 | 4,137,132 | 584,192 |
| Total Services to Other Local Government | 554,916 | 554,916 | - | 665,899 | 110,983 |
| Total Transit | 1,555,051 | 2,074,999 | (519,949) | 2,490,000 | 934,949 |
| Total Environmental Development Services | 331,034 | 229,583 | 101,450 | 275,500 | (55,484) |
| Total Licenses & Permits | 37,970 | 40,417 | (2,447) | 48,500 | 10,531 |
| Total Fines & Fees | 826,276 | 1,000,833 | (174,557) | 1,201,000 | 207,109 |
| Total Rentals | 418,792 | 423,564 | (4,772) | 508,277 | 89,485 |
| Total Concessions & Franchises | 962,918 | 688,750 | 274,169 | 906,500 | 196,453 |
| Total Interest | 1,440,449 | 1,262,500 | 177,949 | 1,515,000 | 74,551 |
| Total Finance Revenue | 34,955 | 29,167 | 5,789 | 35,000 | 45 |
| Total Solid Waste Revenue | 2,770,066 | 2,557,607 | 212,459 | 3,155,000 | 384,934 |
| Total Recreation & Cultural Service Programs | 1,252,996 | 1,323,611 | (70,615) | 1,684,500 | 375,086 |
| Total Water Utility Charges | 10,355,367 | 10,355,367 | - | 12,426,440 | 2,071,073 |
| Total Unconditional Transfers | 13,285,115 | 13,196,532 | 88,583 | 15,835,838 | 2,550,723 |
| Total Conditional Transfers | 508,391 | 508,391 | - | 610,000 | 101,609 |
| Total Extraordinary Revenue | 881,216 | - | 881,216 | - | (881,216) |
| **Year To Date Assigned** | **$ 150,617,830** | **$ 148,183,818** | **$ 2,434,012** | **$ 178,082,548** | **$ 27,493,607** |

Departmental

Reviewed

Summary

## Statement of Expenditures

January 31, 2025

| Expenditures | Year to date Expended | 10 Month Budget | 10 Month Budget Variance | Annual Budget | Annual Budget Remaining |
|---|---|---|---|---|---|
| Legislative | 1,222,342 | 1,411,209 | 188,867 | 1,670,870 | 448,528 |
| Administration | 385,768 | 348,877 | (36,891) | 470,846 | 85,078 |
| Finance | 2,390,248 | 2,589,779 | 199,531 | 3,482,574 | 1,092,326 |
| Legal | 2,819,763 | 2,844,382 | 24,619 | 2,967,058 | 145,232 |
| Human Resources | 1,219,496 | 1,315,658 | 96,162 | 1,544,312 | 324,816 |
| Technology & Communications | 3,671,128 | 3,753,278 | 82,150 | 4,433,208 | 762,080 |
| Municipal Clerk | 930,143 | 814,720 | (115,423) | 886,802 | (43,341) |
| Fiscal Services | 28,655,199 | 28,646,207 | (8,992) | 33,297,154 | 4,641,955 |
| Police Services | 24,432,763 | 27,178,665 | 2,745,901 | 32,260,251 | 7,827,488 |
| Fire Services (Incl EMO) | 17,189,208 | 16,673,540 | (515,668) | 19,973,485 | 2,784,277 |
| Engineering & Public Works | 49,116,436 | 47,989,776 | (1,126,660) | 58,322,156 | 9,205,720 |
| Planning | 2,965,723 | 3,454,800 | 489,077 | 4,017,905 | 1,052,182 |
| Facilities C200 & Arenas | 4,432,466 | 3,888,958 | (543,508) | 4,581,688 | 149,222 |
| Parks & Grounds | 2,529,692 | 2,924,626 | 394,934 | 3,473,848 | 944,156 |
| Buildings | 2,832,242 | 3,195,771 | 363,528 | 3,734,163 | 901,921 |
| Recreation | 2,592,688 | 2,454,569 | (138,119) | 2,966,228 | 373,540 |
| **Total expended to date** | **$ 147,385,304** | **$ 149,484,814** | **$ 2,099,510** | **$ 178,082,548** | **$ 30,695,181** |

Departmental

Reviewed

**Legislative** **Statement of Expenditures** **January 31, 2025**

| Legislative | Year to date Expended | 10 Month Budget | 10 Month Budget Variance | Annual Budget | Annual Budget Remaining |
|---|---|---|---|---|---|
| 6000 WAGES/SALARIES | 889,712 | 958,175 | 68,463 | 1,129,309 | 239,597 |
| 6010 BENEFITS | 142,904 | 191,536 | 48,633 | 226,361 | 83,457 |
| 6030 TRAVEL/CONFERENCES | 41,422 | 75,000 | 33,578 | 90,000 | 48,578 |
| 6040 PROFESSIONAL MEMBERSHIP/DUES & FEES | 47,678 | 79,002 | 31,324 | 94,802 | 47,125 |
| 6050 OFFICE SUPPLIES | 5,586 | 10,333 | 4,748 | 12,400 | 6,814 |
| 6060 OFFICE EQUIPMENT | 6,564 | 5,500 | (1,064) | 5,500 | (1,064) |
| 6080 ADVERTISING | 8,929 | 12,083 | 3,154 | 14,500 | 5,571 |
| 6100 COURIER | - | 208 | 208 | 250 | 250 |
| 6110 TELEPHONE/FAX | 28,832 | 28,540 | (292) | 34,248 | 5,416 |
| 6120 PUBL./SUBSCRIPTIONS | 1,375 | 1,667 | 292 | 2,000 | 625 |
| 6130 COMPUTER HARDWARE | 247 | 248 | - | 8,000 | 7,753 |
| 6150 MEETING EXPENSESS | 14,445 | 22,917 | 8,472 | 27,500 | 13,055 |
| 6170 PROMOTION | 34,648 | 26,000 | (8,649) | 26,000 | (8,648) |
| **Total expended to date** | **$ 1,222,342** | **$ 1,411,209** | **$ 188,867** | **$ 1,670,870** | **$ 448,528** |

SeS

Departmental

Finance

## Administration (CAO) | Statement of Expenditures | January 31, 2025

| CAO | Year to date Expended | 10 Month Budget | 10 Month Budget Variance | Annual Budget | Annual Budget Remaining |
|---|---|---|---|---|---|
| 6000 WAGES/SALARIES | 306,548 | 256,235 | (50,313) | 302,000 | (4,548) |
| 6010 BENEFITS | 38,916 | 47,762 | 8,846 | 56,446 | 17,530 |
| 6020 TRAINING/EDUCATION | - | 2,750 | 2,750 | 3,300 | 3,300 |
| 6030 TRAVEL/CONFERENCES | 16,795 | 16,795 | - | 18,000 | 1,205 |
| 6040 PROFESSIONAL MEMBERSHIP/DUES & FEES | 636 | 1,500 | 864 | 1,800 | 1,164 |
| 6050 OFFICE SUPPLIES | 2,577 | 2,577 | - | 2,800 | 223 |
| 6110 TELEPHONE/FAX | 2,967 | 2,083 | (884) | 2,500 | (467) |
| 6150 MEETING EXPENSES | 1,148 | 3,333 | 2,185 | 4,000 | 2,852 |
| 6170 PROMOTION | 5,339 | 5,000 | (340) | 5,000 | (339) |
| 8100 PROFESSIONAL SERVICES | 10,841 | 10,841 | - | 75,000 | 64,159 |
| **Total expended to date** | **$ 385,768** | **$ 348,877** | **$ (36,891)** | **$ 470,846** | **$ 85,078** |

Departmental

Finance

# Statement of Expenditures



| Finance | Year to date Expended | 10 Month Budget | 10 Month Budget Variance | Annual Budget | Annual Budget Remaining |
|---|---|---|---|---|---|
| 6000 WAGES/SALARIES | 1,633,013 | 1,802,491 | 169,478 | 2,129,641 | 496,628 |
| 6010 BENEFITS | 367,755 | 398,609 | 30,854 | 471,083 | 103,328 |
| 6020 TRAINING/EDUCATION | 9,742 | 10,833 | 1,091 | 13,000 | 3,258 |
| 6030 TRAVEL/CONFERENCES | 13,431 | 13,431 | - | 14,500 | 1,069 |
| 6040 PROFESSIONAL MEMBERSHIP/DUES & FEES | 3,689 | 3,688 | - | 4,000 | 311 |
| 6050 OFFICE SUPPLIES | 8,926 | 9,917 | 990 | 11,900 | 2,974 |
| 6060 OFFICE EQUIPMENT | 8,345 | 6,250 | (2,095) | 7,500 | (845) |
| 6080 ADVERTISING | 27,158 | 31,250 | 4,092 | 37,500 | 10,342 |
| 6090 POSTAGE | 148,689 | 155,000 | 6,311 | 175,000 | 26,311 |
| 6100 COURIER | 11,655 | 19,375 | 7,720 | 23,250 | 11,595 |
| 6110 TELEPHONE/FAX | 14,149 | 13,167 | (982) | 15,800 | 1,651 |
| 6130 COMPUTER HARDWARE | 3,032 | 3,032 | - | 11,400 | 8,368 |
| 6140 COMPUTER SOFTWARE | 54,993 | 52,100 | (2,893) | 52,100 | (2,893) |
| 6180 COST RECOVERY | (314,863) | (336,000) | (21,137) | (360,000) | (45,137) |
| 8010 OPERATIONAL MATERIALS/SUPPLIES | 3,298 | 4,167 | 868 | 5,000 | 1,702 |
| 8100 PROFESSIONAL SERVICES | 51,115 | 59,000 | 7,885 | 59,000 | 7,885 |
| 8110 CONTRACTS/AGREEMENTS | 59,092 | 53,400 | (5,692) | 53,400 | (5,692) |
| 8120 LEASES | 12,376 | 15,417 | 3,041 | 18,500 | 6,124 |
| 8180 TAX EXEMPT/WRITE OFF | 274,653 | 274,653 | - | 740,000 | 465,347 |
| **Total expended to date** | $ 2,390,248 | $ 2,589,779 | $ 199,531 | $ 3,482,574 | $ 1,092,326 |

Departmental

Finance

**Legal** — **Statement of Expenditures** — **January 31, 2025**

| Legal | Year to date Expended | 10 Month Budget | 10 Month Budget Variance | Annual Budget | Annual Budget Remaining |
|---|---|---|---|---|---|
| 6000 WAGES/SALARIES | 398,982 | 455,210 | 56,228 | 537,975 | 138,993 |
| 6010 BENEFITS | 85,208 | 104,570 | 19,363 | 123,583 | 38,375 |
| 6020 TRAINING/EDUCATION | - | 5,417 | 5,417 | 6,500 | 6,500 |
| 6030 TRAVEL/CONFERENCES | 3,555 | 3,750 | 195 | 4,500 | 945 |
| 6040 PROFESSIONAL MEMBERSHIP/DUES & FEES | 11,803 | 17,000 | 5,197 | 17,000 | 5,197 |
| 6050 OFFICE SUPPLIES | 3,354 | 3,354 | - | 3,500 | 146 |
| 6060 OFFICE EQUIPMENT | - | 1,833 | 1,833 | 2,200 | 2,200 |
| 6070 PHOTOCOPYING SUPPLIES | 1,485 | 2,917 | 1,432 | 3,500 | 2,015 |
| 6080 ADVERTISING | - | 3,333 | 3,333 | 4,000 | 4,000 |
| 6100 COURIER | 241 | 667 | 425 | 800 | 559 |
| 6110 TELEPHONE/FAX | 2,574 | 3,333 | 759 | 4,000 | 1,426 |
| 6120 PUBLICATIONS/SUBSCRIPTIONS | 23,480 | 20,000 | (3,480) | 20,000 | (3,480) |
| 6130 COMPUTER HARDWARE | 82 | 82 | - | 4,000 | 3,918 |
| 6150 MEETING EXPENSES | 272 | 417 | 145 | 500 | 228 |
| 6160 LIABILITY INSURANCE | 2,229,713 | 2,160,000 | (69,713) | 2,160,000 | (69,713) |
| 8100 PROFESSIONAL SERVICES | 61,077 | 62,500 | 1,423 | 75,000 | 13,923 |
| **Total expended to date** | **$ 2,819,763** | **$ 2,844,382** | **$ 24,619** | **$ 2,967,058** | **$ 145,232** |

**Departmental**

**Finance**

# Statement of Expenditures

January 31, 2025

| Human Resources | Year to date Expended | 10 Month Budget | 10 Month Budget Variance | Annual Budget | Annual Budget Remaining |
|---|---|---|---|---|---|
| 6000 WAGES/SALARIES | 813,386 | 887,394 | 74,008 | 1,048,738 | 235,352 |
| 6010 BENEFITS | 186,035 | 204,959 | 18,924 | 242,224 | 56,189 |
| 6020 TRAINING/EDUCATION | 10,048 | 9,850 | (198) | 9,850 | (198) |
| 6030 TRAVEL/CONFERENCES | 13,245 | 14,583 | 1,338 | 17,500 | 4,255 |
| 6040 PROFESSIONAL MEMBERSHIP/DUES & FEES | 3,417 | 2,500 | (917) | 2,500 | (917) |
| 6050 OFFICE SUPPLIES | 10,634 | 12,500 | 1,866 | 15,000 | 4,366 |
| 6060 OFFICE EQUIPMENT | 4,522 | 2,500 | (2,021) | 2,500 | (2,022) |
| 6080 ADVERTISING | 1,817 | 2,500 | 683 | 3,000 | 1,183 |
| 6110 TELEPHONE/FAX | 8,238 | 8,333 | 95 | 10,000 | 1,762 |
| 6120 PUBLICATIONS/SUBSCRIPTIONS | - | 2,500 | 2,500 | 3,000 | 3,000 |
| 6130 COMPUTER HARDWARE | 7,603 | 6,000 | (1,603) | 6,000 | (1,603) |
| 6150 MEETING EXPENSES | 4,369 | 5,417 | 1,048 | 6,500 | 2,131 |
| 8100 PROFESSIONAL SERVICES | 150,371 | 150,372 | - | 170,000 | 19,629 |
| 8110 CONTRACTS/AGREEMENTS | 5,811 | 6,250 | 439 | 7,500 | 1,689 |
| **Total expended to date** | **$ 1,219,496** | **$ 1,315,658** | **$ 96,162** | **$ 1,544,312** | **$ 324,816** |

**Departmental**

**Finance**

## Technology Including 911 Comm Centre

## Statement of Expenditures

## January 31, 2025

| Technology/Communications | Year to date Expended | 10 Month Budget | 10 Month Budget Variance | Annual Budget | Annual Budget Remaining |
|---|---|---|---|---|---|
| 6000 WAGES/SALARIES | 2,189,596 | 2,222,283 | 32,687 | 2,626,334 | 436,738 |
| 6010 BENEFITS | 451,302 | 491,224 | 39,922 | 580,538 | 129,236 |
| 6011 MISCELLANEOUS BENEFITS | (47,167) | (47,167) | - | (98,762) | (51,595) |
| 6020 TRAINING/EDUCATION | 9,755 | 22,500 | 12,745 | 27,000 | 17,245 |
| 6030 TRAVEL/CONFERENCES | 31,199 | 17,000 | (14,200) | 17,000 | (14,199) |
| 6040 PROFESSIONAL MEMBERSHIP/DUES | 688 | 1,833 | 1,145 | 2,200 | 1,512 |
| 6050 OFFICE SUPPLIES | 4,023 | 5,417 | 1,394 | 6,500 | 2,477 |
| 6060 OFFICE EQUIPMENT | 2,130 | 10,833 | 8,703 | 13,000 | 10,870 |
| 6080 ADVERTISING | 801 | 3,333 | 2,533 | 4,000 | 3,199 |
| 6110 TELEPHONE/FAX | 111,179 | 125,000 | 13,821 | 150,000 | 38,821 |
| 6130 COMPUTER HARDWARE | 123,335 | 123,335 | - | 205,000 | 81,665 |
| 6140 COMPUTER SOFTWARE | 391,560 | 391,559 | - | 476,500 | 84,940 |
| 6150 MEETING EXPENSES | 1,372 | 1,372 | - | 1,500 | 128 |
| 7010 ELECTRICAL | 9,519 | 9,583 | 65 | 11,500 | 1,981 |
| 7070 BLDG/FACILITY RENTAL | 60,774 | 50,000 | (10,774) | 60,000 | (774) |
| 8040 COMM EQUIPMENT LINES | 2,724 | 1,667 | (1,057) | 2,000 | (724) |
| 8100 PROFESSIONAL SERVICES | 22,384 | 51,667 | 29,282 | 62,000 | 39,616 |
| 8110 CONTRACTS/AGREEMENTS | 86,907 | 52,792 | (34,115) | 63,350 | (23,557) |
| 8120 LEASES SAP | 113,347 | 113,346 | - | 107,446 | (5,901) |
| 8130 LICENSES/PERMITS | 105,700 | 105,700 | - | 116,102 | 10,402 |
| **Total expended to date** | $ 3,671,128 | $ 3,753,278 | $ 82,150 | $ 4,433,208 | $ 762,080 |

Departmental

Finance

# Statement of Expenditures



| Municipal Clerk | Year to date Expended | 10 Month Budget | 10 Month Budget Variance | Annual Budget | Annual Budget Remaining |
|---|---|---|---|---|---|
| 6000 WAGES/SALARIES | 237,761 | 261,737 | 23,976 | 309,325 | 71,564 |
| 6010 BENEFITS | 54,428 | 58,492 | 4,064 | 69,127 | 14,699 |
| 6020 TRAINING/EDUCATION | 2,076 | 4,583 | 2,507 | 5,500 | 3,424 |
| 6030 TRAVEL/CONFERENCES | 339 | 5,250 | 4,911 | 6,300 | 5,961 |
| 6040 PROFESSIONAL MEMBERSHIP/DUES | 928 | 1,167 | 239 | 1,400 | 472 |
| 6050 OFFICE SUPPLIES | 2,445 | 2,500 | 55 | 3,000 | 555 |
| 6060 OFFICE EQUIPMENT | 4,080 | 2,000 | (2,081) | 2,000 | (2,080) |
| 6070 PHOTOCOPYING SUPPLIES | 18,296 | 19,583 | 1,287 | 23,500 | 5,204 |
| 6080 ADVERTISING | 331 | 1,000 | 669 | 1,200 | 869 |
| 6100 COURIER | 30 | 125 | 95 | 150 | 120 |
| 6110 TELEPHONE/FAX | 3,182 | 2,917 | (265) | 3,500 | 318 |
| 6120 PUBLICATIONS/SUBSCRIPTIONS | 534 | 1,500 | 966 | 1,800 | 1,266 |
| 6130 COMPUTER HARDWARE | 7,827 | 3,000 | (4,827) | 3,000 | (4,827) |
| 6140 COMPUTER SOFTWARE | 38,783 | 38,783 | - | 42,500 | 3,717 |
| 6150 MEETING EXPENSES | 3,566 | 12,083 | 8,518 | 14,500 | 10,934 |
| 8110 CONTRACTS/AGREEMENTS | 555,538 | 400,000 | (155,537) | 400,000 | (155,538) |
| **Total expended to date** | **$ 930,143** | **$ 814,720** | **$ (115,423)** | **$ 886,802** | **$ (43,341)** |

**Departmental**

**Finance**

# Statement of Expenditures

**January 31, 2025**

| Fiscal Services | Year to date Expended | 10 Month Budget | 10 Month Budget Variance | Annual Budget | Annual Budget Remaining |
|---|---|---|---|---|---|
| 9010 INTEREST ON SHORT TERM BORROWING | 8,438 | 8,437 | - | 400,000 | 391,562 |
| 9020 INTEREST ON LONG TERM DEBT | 1,589,052 | 1,589,052 | - | 1,617,486 | 28,434 |
| 9050 PRINCIPLE ON LONG TERM DEBT | 9,208,971 | 9,208,971 | - | 9,208,971 | - |
| 9052 DEBT/CAPITAL BOND DISC | - | - | - | 63,000 | 63,000 |
| 9090 BANK CHARGES | 65,629 | 58,333 | (7,296) | 70,000 | 4,371 |
| 9200 ALLOWANCE FOR UNCOLLECTABLE TAXES | - | - | - | 600,000 | 600,000 |
| 9420 APPROPRIATION TO CAPITAL FUND | 908,333 | 908,333 | - | 1,090,000 | 181,667 |
| 9430 APPROPRIATION TO B.I.D.C.s | 178,830 | 177,134 | (1,695) | 212,561 | 33,731 |
| 9620 REGIONAL LIBRARY | 586,500 | 586,500 | - | 703,800 | 117,300 |
| 9630 CAPE BRETON/VICTORIA SCHOOL BOARD | 14,952,334 | 14,952,333 | - | 17,942,800 | 2,990,466 |
| 9640 PROPERTY ASSESSMENT COSTS | 1,157,113 | 1,157,113 | - | 1,388,536 | 231,423 |
| | | | - | | |
| **Total expended to date** | **$ 28,655,199** | **$ 28,646,207** | **$ (8,991)** | **$ 33,297,154** | **$ 4,641,955** |

Departmental

Finance

**Police Services** | **Statement of Revenue** | **January 31, 2025**

| Police Services Revenue | Year to date Assigned | 10 Month Budget | 10 Month Budget Variance | Annual Budget | Annual Budget Remaining |
|---|---|---|---|---|---|
| 4751 RECORDS INQUIRIES | 124,254 | 166,667 | (42,413) | 200,000 | 75,746 |
| 5151 FINES | 266,654 | 250,000 | 16,654 | 300,000 | 33,346 |
| **Total Revenue to date** | **$ 390,908** | **$ 416,667** | **$ (25,759)** | **$ 500,000** | **$ 109,092** |

**Departmental**

**Finance**

# Police Services

# Statement Expenditures

# January 31, 2025

| Police Services | Year to date Expended | 10 Month Budget | 10 Month Budget Variance | Annual Budget | Annual Budget Remaining |
|---|---|---|---|---|---|
| GL 6000, 6010 , & 6011 WAGES & BENEFITS NET OF COST RECOVERY | 21,587,129 | 24,385,053 | 2,797,924 | 28,808,156 | 7,221,027 |
| 6020 TRAINING/EDUCATION | 104,706 | 150,000 | 45,294 | 180,000 | 75,294 |
| 6030 TRAVEL/CONFERENCES | 50,058 | 50,058 | - | 60,000 | 9,942 |
| 6040 PROFESSIONAL MEMBERSHIP/DUES & FEES | 3,924 | 4,167 | 242 | 5,000 | 1,076 |
| 6050 OFFICE SUPPLIES | 33,591 | 37,500 | 3,909 | 45,000 | 11,409 |
| 6060 OFFICE EQUIPMENT | 59,262 | 59,263 | - | 70,000 | 10,738 |
| 6070 PHOTOCOPYING SUPPLIES | 1,655 | 8,333 | 6,679 | 10,000 | 8,345 |
| 6080 ADVERTISING | 4,962 | 4,962 | - | 5,000 | 38 |
| 6100 COURIER | 10,119 | 10,833 | 714 | 13,000 | 2,881 |
| 6110 TELEPHONE/FAX | 161,508 | 166,667 | 5,159 | 200,000 | 38,492 |
| 6120 PUBLICATIONS/SUBSCRIPTIONS | 4,626 | 5,000 | 374 | 6,000 | 1,374 |
| 6130 COMPUTER HARDWARE | 103,481 | 103,481 | - | 217,000 | 113,519 |
| 6140 COMPUTER SOFTWARE | 166,777 | 120,000 | (46,777) | 120,000 | (46,777) |
| 6150 MEETING EXPENSES | 9,514 | 8,333 | (1,181) | 10,000 | 486 |
| 6170 PROMOTION | 7,935 | 8,333 | 398 | 10,000 | 2,065 |
| 7000 HEAT | 13,333 | 26,667 | 13,334 | 32,000 | 18,667 |
| 7010 ELECTRICAL | 79,264 | 93,750 | 14,486 | 112,500 | 33,236 |
| 7020 WATER | 3,369 | 7,104 | 3,736 | 8,525 | 5,156 |
| 7030 BUILDING/FACILITY MAINTENANCE | 88,861 | 88,861 | - | 93,000 | 4,139 |
| 7040 BUILDING FACILITY REPAIR | 6,201 | 12,500 | 6,299 | 15,000 | 8,799 |
| 7060 BUILDING/FACILITY RENOVATION | 10,813 | 12,500 | 1,687 | 15,000 | 4,187 |
| 7070 BUILDING/FACILITY RENTAL | 34,530 | 44,167 | 9,637 | 53,000 | 18,470 |
| 7110 SECURITY | 1,022 | 1,667 | 645 | 2,000 | 978 |
| 7500 VEHICLE/EQUIPMENT MAINTENANCE | 25,367 | 19,167 | (6,200) | 23,000 | (2,367) |
| 7505 GASOLINE & DIESEL | 426,213 | 416,667 | (9,546) | 500,000 | 73,787 |
| 7510 VEHICLE/EQUIPMENT REPAIRS | 325,896 | 250,000 | (75,896) | 300,000 | (25,896) |
| 7530 VEHICLE/EQUIPMENT REPLACEMENT | 443,574 | 443,574 | - | 580,000 | 136,426 |
| 7540 VEHICLE/EQUIPMENT RENTAL | 888 | 1,667 | 779 | 2,000 | 1,112 |
| 7550 VEHICLE/EQUIPMENT TOWING | 1,199 | 3,333 | 2,134 | 4,000 | 2,801 |
| 8000 OPERATIONAL EQUIPMENT | 42,546 | 112,500 | 69,954 | 135,000 | 92,454 |
| 8010 OPERATIONAL MATERIALS/SUPPLIES | 79,954 | 112,500 | 32,546 | 135,000 | 55,046 |
| 8020 MAINTENANCE EQUIPMENT | 11,498 | 5,058 | (6,440) | 6,070 | (5,428) |
| 8090 UNIFORMS/CLOTHING | 116,286 | 145,833 | 29,547 | 175,000 | 58,714 |
| 8100 PROFESSIONAL SERVICES | 258,984 | 112,500 | (146,484) | 135,000 | (123,984) |
| 8110 CONTRACTS/AGREEMENTS | 8,172 | 16,667 | 8,495 | 20,000 | 11,828 |
| 8125 MAJOR INVESTIGATIONS | 145,548 | 130,000 | (15,548) | 130,000 | (15,548) |
| 8150 GRANTS/SUBSIDIES TO ORGANIZATIONS | - | - | - | 25,000 | 25,000 |
| **Total expended to date** | $ 24,432,763 | $ 27,178,665 | $ 2,745,900 | $ 32,260,251 | $ 7,827,488 |

Departmental

Finance

**Municipal Services Agreement** | **Statement of Revenue** | **January 31, 2025**

| Fire Services Revenue | Year to date Assigned | 10 Month Budget | 10 Month Budget Variance | Annual Budget | Annual Budget Remaining |
|---|---|---|---|---|---|
| 4776 PROV NS FIRE PROTECTION GRANT | 153,853 | 153,853 | - | 184,624 | 30,771 |
| 4776 MEMBERTOU MUNICIPAL SERVICES AGRMNT | 401,063 | 401,063 | - | 481,275 | 80,213 |
| **Total Revenue to date** | **$ 554,916** | **$ 554,916** | **$ -** | **$ 665,899** | **$ 110,983** |

Departmental

Finance

## Statement of Expenditures



| Fire Services Including EMO | Year to date Expended | 10 Month Budget | 10 Month Budget Variance | Annual Budget | Annual Budget Remaining |
|---|---|---|---|---|---|
| 6000 WAGES/SALARIES | 6,391,711 | 5,648,774 | (742,937) | 6,701,486 | 309,775 |
| 6010 BENEFITS | 1,183,399 | 1,328,756 | 145,356 | 1,576,540 | 393,141 |
| 6011 MISCELLANEOUS BENEFITS | 21,099 | 42,384 | 21,265 | 50,837 | 29,738 |
| 6020 TRAINING/EDUCATION | 99,595 | 150,288 | 50,694 | 180,346 | 80,751 |
| 6030 TRAVEL/CONFERENCES | 46,606 | 46,100 | (506) | 46,100 | (506) |
| 6040 PROFESSIONAL MEMBERSHIP/DUES & FEES | 1,861 | 10,619 | 8,758 | 12,743 | 10,882 |
| 6050 OFFICE SUPPLIES | 7,230 | 7,958 | 728 | 9,550 | 2,320 |
| 6060 OFFICE EQUIPMENT | 6,793 | 6,450 | (343) | 6,450 | (343) |
| 6080 ADVERTISING | 463 | 4,375 | 3,912 | 5,250 | 4,787 |
| 6110 TELEPHONE/FAX | 37,223 | 33,938 | (3,284) | 40,726 | 3,504 |
| 6120 PUBLICATIONS/SUBSCRIPTIONS | 1 | 583 | 582 | 700 | 699 |
| 6130 COMPUTER HARDWARE | 11,086 | 11,086 | - | 12,000 | 914 |
| 6140 COMPUTER SOFTWARE | 30,471 | 30,470 | - | 35,500 | 5,029 |
| 6150 MEETING EXPENSES | 1,100 | 4,250 | 3,150 | 5,100 | 4,000 |
| 6170 PROMOTION | 15,052 | 24,833 | 9,782 | 29,800 | 14,748 |
| 7000 HEAT | 63,126 | 83,333 | 20,208 | 100,000 | 36,874 |
| 7010 ELECTRICAL | 85,555 | 85,555 | - | 101,948 | 16,393 |
| 7020 WATER | 28,924 | 38,000 | 9,077 | 45,600 | 16,676 |
| 7030 BUILDING/FACILITY MAINTENANCE | 46,923 | 49,390 | 2,467 | 59,268 | 12,345 |
| 7040 BUILDING FACILITY REPAIR | 9,889 | 24,316 | 14,427 | 29,179 | 19,290 |
| 7060 BUILDING/FACILITY RENOVATION | 578 | 4,167 | 3,588 | 5,000 | 4,422 |
| 7500 VEHICLE/EQUIPMENT MAINTENANCE | 344,975 | 237,500 | (107,475) | 285,000 | (59,975) |
| 7505 GASOLINE & DIESEL | 69,203 | 45,888 | (23,315) | 55,065 | (14,138) |
| 7530 VEHICLE/EQUIPMENT REPLACEMENT | 39,887 | 43,750 | 3,863 | 52,500 | 12,613 |
| 7560 VEHICLE/EQUIPMENT GENERAL SUPPLIES | 18,598 | 13,333 | (5,265) | 16,000 | (2,598) |
| 8000 OPERATIONAL EQUIPMENT | 301,483 | 417,550 | 116,067 | 501,060 | 199,577 |
| 8010 OPERATIONAL MATERIALS/SUPPLIES | 57,191 | 38,583 | (18,608) | 46,300 | (10,891) |
| 8020 MAINTENANCE EQUIPMENT | 10,093 | 41,667 | 31,574 | 50,000 | 39,907 |
| 8040 COMMUNICATION EQUIPMENT LINES | - | 3,650 | 3,650 | 4,380 | 4,380 |
| 8090 UNIFORMS/CLOTHING | 47,056 | 58,854 | 11,798 | 70,625 | 23,569 |
| 8100 PROFESSIONAL SERVICES | 8,879 | 13,750 | 4,871 | 16,500 | 7,621 |
| 8110 CONTRACTS/AGREEMENTS | 163,137 | 45,336 | (117,801) | 54,403 | (108,734) |
| 8120 LEASES | 92,464 | 110,956 | 18,492 | 133,147 | 40,683 |
| 8130 LICENSES/PERMITS | 119 | 19,683 | 19,564 | 20,387 | 20,268 |
| 8150 GRANTS/SUBSIDIES TO ORGANIZATIONS | 2,050,446 | 2,050,446 | - | 2,537,611 | 487,165 |
| 8195 WATER SUPPLY & HYDRANTS | 5,896,993 | 5,896,987 | (6) | 7,076,384 | 1,179,392 |
| **Total expended to date** | $ 17,189,208 | $ 16,673,540 | $ (515,667) | $ 19,973,485 | $ 2,784,277 |

Departmental

Finance

## Engineering and Public Works Actuals to Jan 31, 2025

| REVENUE | Year to date Expended | 10 Month Budget | 10 Month Budget Variance | Annual Budget | Annual Budget Remaining | % of Annual Budget |
|---|---|---|---|---|---|---|
| TRANSIT | 1,555,051 | 2,075,000 | (519,949) | 2,107,000 | (551,949) | 0.74 |
| SOLIDWASTE TIP FEES | 2,529,125 | 2,316,667 | 212,459 | 2,635,000 | (105,875) | 0.96 |
| SOLIDWASTE COST RECOVERIES | 240,940 | 240,940 | - | 375,000 | (134,060) | 0.64 |
| WATER UTILITY ADMIN FEE | 10,355,367 | 10,355,367 | - | 5,050,540 | 5,304,827 | 2.05 |
| TOTAL PW REVENUES | 14,680,483 | 14,987,974 | (307,490) | 10,167,540 | 4,512,943 | 1.44 |

| EXPENDITURES | | | | | | |
|---|---|---|---|---|---|---|
| ADMINISTRATION | 3,722,948 | 3,743,239 | 20,290 | 4,557,342 | 834,394 | 0.82 |
| ENGINEERING | 588,899 | 677,872 | 88,973 | 809,030 | 220,131 | 0.73 |
| CENTRAL DIVISION | 7,687,931 | 7,298,085 | (389,846) | 8,528,461 | 840,530 | 0.90 |
| EAST DIVISION | 6,543,035 | 6,450,968 | (92,066) | 7,520,485 | 977,451 | 0.87 |
| NORTH DIVISION | 2,877,479 | 2,947,275 | 69,796 | 3,640,485 | 763,006 | 0.79 |
| SOLID WASTE | 15,388,794 | 14,037,383 | (1,351,411) | 15,867,558 | 478,764 | 0.97 |
| MECHANICAL FLEET | 5,038,337 | 4,545,093 | (493,244) | 4,909,477 | (128,860) | 1.03 |
| TRANSIT | 7,269,014 | 8,289,862 | 1,020,848 | 8,555,620 | 1,286,606 | 0.85 |
| | | | - | 3,776,878 | 3,776,878 | - |
| TOTAL PW EXPENDITURES | 49,116,436 | 47,989,776 | (1,126,660) | 58,165,336 | 9,048,900 | 0.84 |

Signature:

Director of Engineering & Public Works

Chief Financial Officer

# Statement of Revenue



| | Year to date Assigned | 10 Month Budget | 10 Month Budget Variance | Annual Budget | Annual Budget Remaining |
|---|---|---|---|---|---|
| **Bylaw Revenue** | | | | | |
| 5112 Vendor Licenses | $ 6,905 | $ 12,083 | $ (5,178) | $ 14,500 | $ 7,595 |
| 5113 Animal Licenses | 1,923 | 8,333 | (6,410) | 10,000 | 8,077 |
| 5114 Taxi Licenses | 29,142 | 16,667 | 12,475 | 20,000 | (9,142) |
| 5115 Vending Machine Licenses | - | 3,333 | (3,333) | 4,000 | 4,000 |
| 5301 Parking Meter Revenue | 132,385 | 250,000 | (117,615) | 300,000 | 167,615 |
| Total Bylaw Revenue | $ 170,355 | $ 290,417 | $ (120,062) | $ 348,500 | $ 178,145 |
| **Development / Plannning Revenue** | | | | | |
| 5496 Mapping Sales | $ 50 | $ 417 | $ (367) | $ 500 | $ 450 |
| 5495 Other Sales | 21,091 | 4,167 | 16,925 | 5,000 | (16,091) |
| 5497 Lun Ammendment Fees | 1,900 | 4,167 | (2,267) | 5,000 | 3,100 |
| 5101 Building Permits | 277,297 | 187,500 | 89,797 | 225,000 | (52,297) |
| 5102 Subdivision Fees | 30,695 | 33,333 | (2,638) | 40,000 | 9,305 |
| Total Develop / Planning Rev | $ 331,034 | $ 229,583 | $ 101,450 | $ 275,500 | $ (55,534) |
| **Total Bylaw / Dev / Planning Revenue** | $ 501,389 | $ 520,000 | $ (18,611) | $ 624,000 | $ 122,611 |

**Departmental**

**Finance**

## Statement of Expenditures

**January 31, 2025**

| Planning Department | Year to date Expended | 10 Month Budget | 10 Month Budget Variance | Annual Budget | Annual Budget Remaining |
|---|---|---|---|---|---|
| 6000 WAGES/SALARIES | 1,260,433 | 1,551,460 | 291,027 | 1,833,544 | 573,111 |
| 6010 BENEFITS | 322,036 | 372,997 | 50,962 | 440,815 | 118,779 |
| 6011 MISCELLANEOUS BENEFITS | (33,186) | (33,187) | - | (108,501) | (75,315) |
| 6020 TRAINING/EDUCATION | 4,737 | 17,083 | 12,346 | 20,500 | 15,763 |
| 6030 TRAVEL/CONFERENCES | 29,004 | 23,333 | (5,671) | 28,000 | (1,004) |
| 6040 PROFESSIONAL MEMBERSHIP/DUES & FEES | 6,056 | 5,417 | (639) | 6,500 | 444 |
| 6050 OFFICE SUPPLIES | 8,620 | 12,917 | 4,297 | 15,500 | 6,880 |
| 6060 OFFICE EQUIPMENT | 11,137 | 12,083 | 947 | 14,500 | 3,363 |
| 6080 ADVERTISING | 5,850 | 22,083 | 16,233 | 26,500 | 20,650 |
| 6110 TELEPHONE/FAX | 12,508 | 12,500 | (8) | 15,000 | 2,492 |
| 6120 PUBL./SUBSCRIPTIONS | - | 333 | 333 | 400 | 400 |
| 6130 COMPUTER HARDWARE | 4,623 | 7,917 | 3,294 | 13,500 | 8,877 |
| 6140 COMPUTER SOFTWARE | 3,737 | 10,417 | 6,679 | 14,500 | 10,763 |
| 6150 MEETING EXPENSES | 312 | 5,167 | 4,855 | 6,200 | 5,888 |
| 6170 PROMOTION | 6,051 | 25,000 | 18,949 | 30,000 | 23,949 |
| 7130 DEMOLITIONS | - | - | - | 120,000 | 120,000 |
| 8000 OPERATIONAL EQUIPMENT | 16,560 | 27,500 | 10,940 | 33,000 | 16,440 |
| 8010 OPERATIONAL MATERIALS/SUPPLIES | 6,712 | 3,333 | (3,379) | 4,000 | (2,712) |
| 8090 UNIFORMS / CLOTHING | 4,064 | 6,667 | 2,602 | 8,000 | 3,936 |
| 8100 PROFESSIONAL SERVICES | 353,055 | 353,000 | (56) | 353,000 | (55) |
| 8110 CONTRACTS/AGREEMENTS | 335,016 | 383,333 | 48,317 | 460,000 | 124,984 |
| 8130 LICENSES/PERMITS | 74,898 | 101,947 | 27,049 | 101,947 | 27,049 |
| 8135 REGULATORY FEES | 41,562 | 41,562 | - | 41,000 | (562) |
| 8150 GRANTS /SUBS TO ORG | 491,937 | 491,937 | - | 540,000 | 48,063 |
| **Total expended to date** | $ 2,965,723 | 3,454,800 | $ 489,078 | $ 4,017,905 | $ 1,052,182 |

Departmental

Finance

**Facilities (C200 / Arenas)** **Statement of Revenue** **January 31, 2025**

| | **Year to date Expended** | **10 Month Budget** | **10 Month Budget Variance** | **Annual Budget** | **Annual Budget Remaining** |
|---|---|---|---|---|---|
| GL 4808 Advertising Revenue | 7,018 | 129,167 | (122,148) | 155,000 | 147,982 |
| GL 5001 Ice Rentals | 895,934 | 753,194 | 142,739 | 1,000,000 | 104,066 |
| GL 5002 Public Skating | 1,150 | 4,167 | (3,016) | 5,000 | 3,850 |
| GL 5005 Gym Rental | - | 43,333 | (43,333) | 52,000 | 52,000 |
| GL 5006 Canteen Sales | 880,326 | 612,083 | 268,242 | 814,500 | (65,826) |
| GL 5010 Other Revenue | 82,593 | 76,666 | 5,926 | 92,000 | 9,407 |
| GL 5033 Program Equipment | 13,822 | 25,000 | (11,178) | 30,000 | 16,178 |
| GL 5034 Facility Rentals | 306,186 | 337,500 | (31,314) | 405,000 | 98,814 |
| **Total Revenue To Date** | **$ 2,187,029** | **$ 1,981,110** | **$ 205,919** | **$ 2,553,500** | **$ 366,471** |

Departmental

Finance

## Facilities (C200 / Arenas) — Statement of Expenditures — January 31, 2025

| | Year to date Expended | 10 Month Budget | 10 Month Budget Variance | Annual Budget | Annual Budget Remaining |
|---|---|---|---|---|---|
| 6000 WAGES/SALARIES | 1,784,381 | 1,598,480 | (185,901) | 1,889,113 | 104,732 |
| 6010 BENEFITS | 326,864 | 346,225 | 19,361 | 409,175 | 82,311 |
| 6020 TRAINING | 991 | 4,583 | 3,593 | 5,500 | 4,509 |
| 6030 TRAVEL/CONFERENCES | 6,459 | 6,459 | - | 7,000 | 541 |
| 6040 PROFESSIONAL MEMBERSHIP/ | 2,727 | 2,917 | 190 | 3,500 | 773 |
| 6050 OFFICE SUPPLIES | 6,843 | 4,500 | (2,343) | 4,500 | (2,343) |
| 6060 OFFICE EQUIPMENT | 524 | 1,667 | 1,143 | 2,000 | 1,476 |
| 6080 ADVERTISING | 3,146 | 5,000 | 1,854 | 6,000 | 2,854 |
| 6110 TELEPHONE/FAX | 32,666 | 17,708 | (14,958) | 21,250 | (11,416) |
| 6130 COMPUTER HARDWARE | 4,455 | 2,500 | (1,955) | 2,500 | (1,955) |
| 6140 COMPUTER SOFTWARE | - | - | - | 5,500 | 5,500 |
| 6150 MEETING EXPENSESS | 1,955 | 2,500 | 545 | 3,000 | 1,045 |
| 7000 HEAT | 152,145 | 87,583 | (64,561) | 109,000 | (43,145) |
| 7010 ELECTRICAL | 756,830 | 711,367 | (45,463) | 884,000 | 127,170 |
| 7020 WATER | 66,542 | 68,458 | 1,917 | 82,150 | 15,608 |
| 7030 BLDG/FACILITY MAINT | 151,653 | 84,167 | (67,487) | 101,000 | (50,653) |
| 7040 BLDG/FACILITY REPAIR | 76,926 | 76,926 | - | 85,000 | 8,074 |
| 7080 PLANT MAINTENANCE | 113,093 | 75,000 | (38,093) | 90,000 | (23,093) |
| 7110 SECURITY | 168,467 | 116,667 | (51,800) | 140,000 | (28,467) |
| 7510 VEH/EQUIP REPAIRS | 7,966 | 20,833 | 12,867 | 25,000 | 17,034 |
| 8000 OPERATIONAL EQUIPMENT | 53,212 | 15,000 | (38,212) | 18,000 | (35,212) |
| 8010 OPERATIONAL MATERIALS/SUF | 156,301 | 141,667 | (14,635) | 170,000 | 13,699 |
| 8050 COST OF SALES | 446,942 | 418,750 | (28,192) | 422,500 | (24,442) |
| 8090 UNIFORMS/CLOTHING | 5,649 | 9,167 | 3,518 | 11,000 | 5,351 |
| 8100 PROFESSIONAL SERVICE | 42,260 | - | (42,260) | - | (42,260) |
| 8110 CONTRACTS/AGREEMENTS | 63,468 | 70,833 | 7,365 | 85,000 | 21,532 |
| **Total expended to date** | **$ 4,432,466** | **$ 3,888,958** | **$ (543,508)** | **$ 4,581,688** | **$ 149,222** |

**Departmental**

**Finance**

## Parks and Grounds
## Operations

## Statement of Expenditures

## January 31, 2025

| Parks & Grounds | Year to date Expended | 10 Month Budget | 10 Month Budget Variance | Annual Budget | Annual Budget Remaining |
|---|---|---|---|---|---|
| 6000 WAGES/SALARIES | 1,292,968 | 1,502,002 | 209,034 | 1,775,093 | 482,125 |
| 6010 BENEFITS | 318,953 | 363,004 | 44,052 | 429,005 | 110,053 |
| 6011 MISCELLANEOUS BENEFITS | 7,013 | 2,083 | (4,930) | 2,500 | (4,513) |
| 6020 TRAINING/EDUCATION | 29,437 | 7,000 | (22,437) | 7,000 | (22,437) |
| 6030 TRAVEL/CONFERENCES | 1,205 | 8,333 | 7,129 | 10,000 | 8,795 |
| 6040 PROFESSIONAL MEMBERSHIP/DUES & FEES | 101 | 167 | 65 | 200 | 99 |
| 6050 OFFICE SUPPLIES | 392 | 1,000 | 608 | 1,200 | 808 |
| 6110 TELEPHONE/FAX | 11,170 | 8,333 | (2,837) | 10,000 | (1,170) |
| 6130 COMPUTER HARDWARE | - | 2,500 | 2,500 | 3,000 | 3,000 |
| 7000 HEAT | 3,489 | 10,000 | 6,511 | 12,000 | 8,511 |
| 7010 ELECTRICAL | 68,981 | 70,417 | 1,436 | 84,500 | 15,519 |
| 7020 WATER | 72,111 | 32,292 | (39,819) | 38,750 | (33,361) |
| 7030 BUILDING/FACILITY MAINTENANCE | 3,293 | 7,917 | 4,623 | 9,500 | 6,207 |
| 7110 SECURITY | 8,969 | 10,200 | 1,231 | 10,200 | 1,231 |
| 7510 VEHICLE/EQUIPMENT REPAIRS | 10,678 | 917 | (9,762) | 1,100 | (9,578) |
| 7530 VEHICLE/EQUIPMENT REPLACEMENT | - | - | - | 50,000 | 50,000 |
| 7540 VEHICLE/EQUIPMENT RENTAL | 17,212 | 12,500 | (4,712) | 15,000 | (2,212) |
| 8000 OPERATIONAL EQUIPMENT | 2,711 | 37,500 | 34,789 | 45,000 | 42,289 |
| 8010 OPERATIONAL MATERIALS/SUPPLIES | 373,020 | 373,020 | - | 400,000 | 26,980 |
| 8020 MAINTENANCE EQUIPMENT | 12,700 | 54,167 | 41,467 | 65,000 | 52,300 |
| 8040 COMMUNICATION EQUIPMENT LINES | 8,908 | 9,167 | 258 | 11,000 | 2,092 |
| 8080 STREET LIGHTS | 2,932 | 4,833 | 1,901 | 5,800 | 2,868 |
| 8090 UNIFORMS/CLOTHING | 14,889 | 11,441 | (3,448) | 13,000 | (1,889) |
| 8100 PROFESSIONAL SERVICES | 36,505 | 45,833 | 9,328 | 55,000 | 18,495 |
| 8110 CONTRACTS/AGREEMENTS | 232,055 | 350,000 | 117,945 | 420,000 | 187,945 |
| **Total expended to date** | **2,529,692** | **$ 2,924,626** | **$ 394,934** | **$ 3,473,848** | **$ 944,156** |

**Departmental**

**Finance**

# Statement of Expenditures



| Buildings | Year to date Expended | 10 Month Budget | 10 Month Budget Variance | Annual Budget | Annual Budget Remaining |
|---|---|---|---|---|---|
| 6000 WAGES/SALARIES | 1,158,911 | 1,308,996 | 150,085 | 1,546,995 | 388,084 |
| 6010 BENEFITS | 285,758 | 313,359 | 27,601 | 370,333 | 84,575 |
| 6020 TRAINING/EDUCATION | 1,412 | 7,083 | 5,672 | 8,500 | 7,088 |
| 6030 TRAVEL/CONFERENCES | 129 | 1,042 | 913 | 1,250 | 1,121 |
| 6050 OFFICE SUPPLIES | 750 | 833 | 83 | 1,000 | 250 |
| 6060 OFFICE EQUIPMENT | 2,942 | 3,333 | 391 | 4,000 | 1,058 |
| 6110 TELEPHONE/FAX | 10,308 | 10,833 | 526 | 13,000 | 2,692 |
| 6130 COMPUTER HARDWARE | 4,515 | 3,000 | (1,515) | 3,000 | (1,515) |
| 6140 COMPUTER SOFTWARE | - | - | - | 6,500 | 6,500 |
| 6150 MEETING EXPENSE | 143 | 208 | 66 | 250 | 107 |
| 7000 HEAT | 91,329 | 108,333 | 17,005 | 130,000 | 38,671 |
| 7010 ELECTRICAL | 405,073 | 491,008 | 85,936 | 589,210 | 184,137 |
| 7020 WATER | 38,379 | 47,146 | 8,767 | 56,575 | 18,196 |
| 7030 BLDG/FACILITY MAINT | 29,283 | 35,417 | 6,133 | 42,500 | 13,217 |
| 7060 BLDG/FACILITY RENOV | 25,735 | 83,333 | 57,598 | 100,000 | 74,265 |
| 7070 BLDG/FACILITY RENTAL | 161,372 | 170,917 | 9,545 | 205,100 | 43,728 |
| 7080 PLANT MAINTENANCE | 9,336 | 12,500 | 3,164 | 15,000 | 5,664 |
| 7100 MAINT. TOOLS/EQUIP | 4,524 | 2,917 | (1,607) | 3,500 | (1,024) |
| 7110 SECURITY | 42,888 | 47,917 | 5,029 | 57,500 | 14,612 |
| 7120 PROPERTY TAXES | 27,855 | 28,000 | 145 | 28,000 | 145 |
| 7540 VEH/EQUIP RENTAL | 4,836 | 2,083 | (2,752) | 2,500 | (2,336) |
| 8000 OPERATIONAL EQUIP | - | 2,083 | 2,083 | 2,500 | 2,500 |
| 8010 OPERATIONAL MATERIALS/S | 135,358 | 121,350 | (14,008) | 121,350 | (14,008) |
| 8020 MAINTENANCE EQUIP | - | 1,667 | 1,667 | 2,000 | 2,000 |
| 8040 COMM EQUIP LINES (GPS) | 3,135 | 3,667 | 532 | 4,400 | 1,265 |
| 8090 UNIFORMS/CLOTHING | 3,797 | 3,797 | - | 4,500 | 703 |
| 8100 PROFESSIONAL SERVICES | 86,082 | 86,082 | - | 100,000 | 13,918 |
| 8110 CONTRACTS/AGREEMENTS | 248,033 | 248,033 | - | 253,700 | 5,667 |
| 8130 LICENSES/PERMITS | 361 | 833 | 472 | 1,000 | 639 |
| 8150 GRANTS/SUBS TO ORG | 50,000 | 50,000 | - | 60,000 | 10,000 |
| **Total expended to date** | $ 2,832,242 | $ 3,195,771 | $ 363,528 | $ 3,734,163 | $ 901,921 |

Departmental

Finance

**Recreation Cultural Services** **Statement of Expenditures** **January 31, 2025**

| Recreation/Cultural Services | Year to date Expended | 10 Month Budget | 10 Month Budget Variance | Annual Budget | Annual Budget Remaining |
|---|---|---|---|---|---|
| GL 6000, 6010, & 6011 Wages & Benefits Including Summer Students | 1,349,884 | 1,165,971 | (183,912) | 1,377,966 | 28,082 |
| 6020 TRAINING/EDUCATION | 10,805 | 13,333 | 2,528 | 16,000 | 5,195 |
| 6030 TRAVEL/CONFERENCES | 20,600 | 20,833 | 233 | 25,000 | 4,400 |
| 6040 PROFESSIONAL MEMBERSHIP/DU | 673 | 3,333 | 2,661 | 4,000 | 3,327 |
| 6050 OFFICE SUPPLIES | 6,631 | 6,000 | (631) | 6,000 | (631) |
| 6060 OFFICE EQUIPMENT | 5,946 | 6,667 | 720 | 8,000 | 2,054 |
| 6080 ADVERTISING | 21,833 | 58,333 | 36,501 | 70,000 | 48,167 |
| 6110 TELEPHONE/FAX | 6,299 | 7,500 | 1,201 | 9,000 | 2,701 |
| 6120 PUBLICATIONS/SUBSCRIPTIONS | 452 | 167 | (285) | 200 | (252) |
| 6130 COMPUTER HARDWARE | 5,977 | 5,977 | - | 7,000 | 1,023 |
| 7070 BUILDING/FACILITY RENTAL | 39,295 | 38,333 | (962) | 46,000 | 6,705 |
| 8000 OPERATIONAL EQUIPMENT | 242,185 | 180,000 | (62,185) | 180,000 | (62,185) |
| 8025 COMMUNITY EVENTS | 217,320 | 283,333 | 66,013 | 340,000 | 122,680 |
| 8150 GRANTS/SUBSIDIES TO ORGANIZ/ | 20,000 | 20,000 | - | 20,000 | - |
| 8160 SUSTAINABILITY EVENTS | 286,186 | 286,186 | - | 356,562 | 70,376 |
| 8170 SUSTAINABILITY | 358,601 | 358,601 | - | 500,500 | 141,899 |
| **Total expended to date** | **$ 2,592,688** | **$ 2,454,569** | **$ (138,119)** | **$ 2,966,228** | **$ 373,540** |

**Departmental**

**Finance**

**Recreation /**
**Cultural Services**

**Statement of Revenue**

**January 31, 2025**

| Recreation/Cultural Services | Year to date Assigned | 10 Month Budget | 10 Month Budget Variance | Annual Budget | Annual Budget Remaining |
|---|---|---|---|---|---|
| 5031 PROGRAM REVENUE | 25,000 | 25,000 | - | 30,000 | 5,000 |
| 5034 FACILITY RENTALS | 3,885 | 6,250 | (2,365) | 7,500 | 3,615 |
| **Total Revenue To Date** | **$ 28,885** | **$ 31,250** | **$ (2,365)** | **$ 37,500** | **$ 8,615** |

**Departmental**

**Finance**

**Cape Breton Regional Municipality Water Utility**
**Statement of Operations - period ending Janaury 31, 2025**

| | Actual Janaury 31, 2025 | Budget Janaury 31, 2025 | Variance Janaury 31, 2025 | Total Annual Budget 2024-25 |
|---|---|---|---|---|
| **Revenue** | | | | |
| Operating: | | | | |
| Metered Sales | 17,156,673 | 16,015,516 | 1,141,157 | 19,218,619 |
| Public Fire Protection | 5,896,993 | 5,896,993 | - | 7,076,391 |
| Interest on Overdue Accounts | 533,139 | 291,667 | 241,472 | 350,000 |
| Other Operating Revenue | 3,834 | 55,000 | (51,166) | 66,000 |
| Total Operating Revenue | 23,590,638 | 22,259,175 | 1,331,463 | 26,711,010 |
| **Expenditures** | | | | |
| Operating Expenses | | | | |
| Source of Supply | 436,351 | 475,231 | 38,879 | 570,277 |
| Power and Pumping | 1,445,660 | 1,752,751 | 307,091 | 2,103,301 |
| Water Treatment | 4,743,921 | 4,337,001 | (406,920) | 5,204,401 |
| Transmission & Distribution | 3,975,762 | 4,343,136 | 367,374 | 5,211,763 |
| Administration & General | 2,650,902 | 3,397,959 | 747,057 | 4,077,551 |
| Depreciation | 3,396,700 | 3,396,700 | - | 4,076,040 |
| Taxes | 1,884,710 | 1,734,855 | (149,855) | 2,081,826 |
| Total Operating Expenses | 18,534,007 | 19,437,633 | 903,626 | 23,325,159 |
| **Operating Profit/(Loss)** | **5,056,631** | **2,821,542** | **2,235,088** | **3,385,851** |

**Cape Breton Regional Municipality Water Utility**
**Statement of Operations - period ending Janaury 31, 2025**

| | Actual Janauary 31, 2024 | Budget Janauary 31, 2024 | Variance Janauary 31, 2024 | Total Annual Budget 2024-25 |
|---|---|---|---|---|
| **Non Operating Revenue** | | | | |
| Debt Charge Income | - | - | - | - |
| Interest Income | - | - | - | - |
| Amorization of Deferred Capital contribution | | - | - | - |
| Total Non Operating Revenue | - | - | - | - |
| **Non Operating Expenses** | | | | |
| Short term interest charges | 112,500 | 125,000 | 12,500 | 150,000 |
| **Debt Charges** | | | | |
| Principal | 2,073,375 | 2,073,375 | - | 2,949,454 |
| Interest (Interest on Debentures) | 364,465 | 364,465 | - | 1,065,842 |
| Amortization of Debt Discount | - | - | - | - |
| Capital Expenditures out of operations | 112,500 | 166,667 | 54,167 | 200,000 |
| Total Non Operating Expenses | 2,662,840 | 2,729,506 | 66,667 | 4,365,296 |
| **Non- Operating Profit/(Loss)** | **(2,662,840)** | **(2,729,506)** | **66,667** | **(4,365,296)** |
| TOTAL UTILITY REVENUES (OPERATING & NON-OPERATING) | 23,590,638 | 22,259,175 | 1,331,463 | 26,711,010 |
| TOTAL UTILITY EXPENSES (OPERATING & NON-OPERATING) | 21,196,846 | 22,167,139 | 970,292 | 27,690,455 |
| **CBRM WATER UTILITY PROFIT/(LOSS)** | **2,393,791** | **92,036** | **2,301,755** | **(979,445)** |

**DEPARTMENT**

**FINANCE**

NOVA SCOTIA

**Emergency Management**
**Office of the Minister**

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

January 17, 2025

***VIA EMAIL***

To: Mayors, CAOs and Wardens

**Re: Moving towards Consistent and Impactful Emergency Response**

Over the last few years Nova Scotia has endured generational hurricanes, wildfires and floods that have had a devastating impact on our communities and the residents we serve. That is why in the Spring 2024 the Government established the Department of Emergency Management and the Nova Scotia Guard.

In the short time I have been in the role as Minister for the Department of Emergency Management, there have been two activations of the Provincial Coordination Centre (PCC). I have witnessed how important our emergency management planning and response is to the safety of our citizens. I also know the importance of reflecting on lessons learned after each event. To this end, I am requesting that municipalities put the following protocols in place during an emergency response.

**Activation of Emergency Operations Centres**

Effective emergency management requires a common tiered response across all levels of government to ensure roles and accountabilities are clear. With that in mind, I felt it would be helpful to highlight how the PCC supports its various emergency management partners through its different levels of activation.

- At level 1, the PCC is **monitoring** an emergency or developing situation that may move beyond the ability of local responders to address at the municipal level. We have key staff and partners engaged so that if needed we can respond to an emergency.
- At level 2, the PCC is at **partial activation** when there is a moderate event expected, or if a current situation escalates to the point where it involves more communities or a greater risk to the public.
- At level 3, the PCC enters **full activation** when a major event involving multiple locations is happening or anticipated. At this point, many agency and government representatives are involved.

To ensure a consistent response across the Province we are requesting the following:

**When the PCC activates to a level 2; municipalities in the affected area(s) also activate their local Emergency Operations Centres.**

- By doing so, we can ensure that municipalities and the province are well positioned to respond rapidly and effectively to unfolding events. Recent experience has demonstrated that cell phones and other means of communication can be interrupted during emergency events necessitating use of the redundant communications systems found in our emergency operations centres. Best practice dictates that activation at Level 2 cannot be virtual.

**When the EOC is activated, a monitored phone number is available to citizens for the duration of the activation**

- When a level 2 activations occurs, it means residents may be in greater need of support that is of an important but non-urgent nature. This may include requests for help with snow removal, receiving medications or checking in on loved ones. To support residents with these types of requests it is important that they have access to a 24-hour local municipal phone number during an emergency. Any requests that cannot be met at the local level can be elevated through a Request for Assistance through the PCC. The municipal emergency contact number will be shared with our partners at 211 Nova Scotia, in the event they receive requests, and can redirect them accordingly.
- Urgent requests for immediate threat to life and property (fire/police/medical) should continue to be directed to the provincial 911 system.

Over the coming months, the department will be opening Regional Emergency Operation Centres which will support municipal REMOs through collaborative planning, training, exercising and community outreach. By introducing the protocols above, we take a step forward in building a collaborative and enhanced emergency management response across the province. My staff are available to discuss the above points with you should you have questions.

Sincerely,

Original Signed by

Kim Masland
Minister of Emergency Management

NOVA SCOTIA

**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

March 7, 2025

Dear Mayors and Wardens:

I am writing to inform you that the Minimum Planning Regulations under Section 214 of the *Municipal Government Act* (MGA) and Section 229 of the *Halifax Regional Municipality Charter* (HRMC) have been amended to implement a maximum setback for commercial wind turbines.

The new regulations will require that the maximum distance between a commercial wind turbine and a dwelling cannot be more than either four times the height of the turbine, or the distance needed to keep noise levels below 40 decibels outside the home and limit shadow flicker to no more than 30 minutes a day or 30 hours a year.

Additionally, the amendments stipulate that visual impact or aesthetic appearance of a wind turbine development is not a matter Council can consider prior to approval.

The Government of Nova Scotia is committed to reaching 80% renewables by 2030. These regulatory amendments will support this goal by providing consistent standards across Nova Scotia's municipalities, making it easier for wind energy projects to move forward, while also protecting residents from negative impacts from wind development projects such as noise and shadows.

You can find the updated Minimum Planning Regulations using the following links:

- *Halifax Regional Municipality Charter*
  https://novascotia.ca/just/regulations/rxaa-l.htm#hrmcmpr

- *Municipal Government Act*
  https://novascotia.ca/just/regulations/rxam-z.htm#mgampr

I have also included a Question-and-Answer document that provides further information about the updated regulations.

I want to thank you for taking the time to participate in the online survey from earlier this summer. Your feedback was invaluable throughout the regulation development process.

Sincerely,

Original Signed by

Honourable John A. Lohr
Minister of Municipal Affairs and Housing

c: Juanita Spencer, NSFM
Chief Administrative Officers

# Wind Turbine Setbacks

## Summary of Changes

The Department of Municipal Affairs is making amendments to the Minimum Planning Requirements Regulations under Section 214 of the *Municipal Government Act* (MGA) and Section 229 of the *Halifax Regional Municipality Charter* (HRMC) to implement a provincial standard for wind turbine setbacks.

The new regulations will require that the maximum distance between a commercial wind turbine and a dwelling cannot be more than either four times the height of the turbine or the distance needed to keep noise levels below 40 decibels outside the home and limit shadow flicker to no more than 30 minutes a day or 30 hours a year.

Additionally, the amendments stipulate that visual impact or aesthetic appearance of a wind turbine development is not a matter Council can consider prior to approval.

Nova Scotia is committed to reaching 80% renewables by 2030. These changes support this goal by providing consistent standards across Nova Scotia's municipalities, making it easier for wind energy projects to move forward while protecting residents from negative impacts from wind development projects such as noise and shadows.

## FAQ

### Q: What are the benefits of Wind Energy in Nova Scotia

Wind energy does not result in emissions that cause the health problems associated with fossil fuels, such as sulfur dioxide, nitrous oxide, mercury, or the environmental problems that come from carbon dioxide - one of the greenhouse gases that contribute to climate change. Every megawatt of wind energy can reduce our greenhouse gas emissions by as much as 2,500 tonnes per year—enough clean energy to power 350–400 Nova Scotian homes.

Wind energy does not use up natural resources. Capturing and transforming the energy of wind into the energy of electricity is infinitely renewable.

Nova Scotia has legislated goals in the *Environmental Goals and Climate Change Reduction Act* (PDF) to get off coal and have 80% of electricity generated with renewables by 2030 – and to reach net zero by 2050. Learn more here.

### Q: Should residents be concerned about the resulting noise and light flicker of Wind Turbines? What about concerns with the turbines causing illness?

It's important to remember that potential wind farms over 2 megawatts must undergo an environmental assessment which requires companies to identify the benefits of their project, its potential impacts on the environment and human health, and their plans to mitigate impacts. Projects must also obtain other required authorizations, permits and permissions from various levels of government before being built. There is no scientific evidence to support the belief that wind turbines cause illnesses.

The proposed regulatory changes will ensure municipalities have consistent standards regarding wind turbine setback distances that will ensure that residents will not be impacted by noise and light flicker.

### Q: What about the threat to migratory birds that turbines present?

Wind turbines are attributable to less bird deaths than cats and tall buildings. Consideration of potential impacts to migratory birds as a result of a wind turbine project are included within the Government of Nova Scotia's environmental assessment process. Companies must ensure that they comply with federal migratory bird legislation.

### Q: Why is the Nova Scotia Government Making this change?

Wind turbines do create noise and may not be appropriate for all locations. The Government of Nova Scotia is making this change to ensure that wind projects are properly developed and managed consistently across all municipalities.

### Q: How would distance required for sound and shadow flicker be established?

Distance for sound and shadow flicker is based on project specific factors. The provincial Environmental Assessment process considers these factors prior to granting approval of commercial Wind Turbine projects (at least 2MW). A municipality may decide to incorporate the *Minimum Planning Requirements Regulations* about setbacks from wind turbines to dwellings, as written, into their Planning Documents for ease of implementation.

### Q: How does a municipality determine if their existing requirements are consistent with the proposed maximums?

We understand that many municipalities who regulate wind turbines, have policies or bylaws including a distance setback (i.e., Kms). These policies or bylaws may be contrary to the *Minimum Planning Requirements Regulations* amendments. The Provincial Planners supporting your region and the NRR contact provided can help you consider how your existing requirements relate to the amendments to the *Minimum Planning Requirements Regulations*. You should also seek advice from your solicitor should you have questions regarding the regulations.

### Q: Will there be a deadline for when municipalities that have existing wind requirements should be consistent with the new requirements?

There is no specific deadline set. It is expected that municipalities bring their setback requirements in line with the newly amended *Minium Planning Requirements Regulations* as soon as reasonably possible.

**Sharon MacSween**

| | |
|---|---|
| **From:** | Christa L. Dicks |
| **Sent:** | March 12, 2025 1:35 PM |
| **To:** | Sharon MacSween |
| **Subject:** | FW: [EXTERNAL]- Nova Scotia Approves the Built Environment Accessibility Standard |

**From:** Accessibility Directorate <Accessibility@novascotia.ca>
**Sent:** March 12, 2025 1:34 PM
**Subject:** [EXTERNAL]- Nova Scotia Approves the Built Environment Accessibility Standard

[EXTERNAL] CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

**The Built Environment Accessibility Standard was approved, making it Nova Scotia's first accessibility standard under the Accessibility Act!**

Government has approved the standard this week. This is the first of six accessibility standards that Government has committed to enacting as regulations under the *Accessibility Act*.

The Built Environment Accessibility Standard is focused on accessibility of outdoor and recreational spaces. It introduces technical design requirements for new and redeveloped infrastructure starting April 1, 2026, as well as new accessibility planning requirements which are due April 1, 2026. Learn more at the Accessibility Directorate's website.

Accessibility of buildings has been addressed through amendments to the Nova Scotia Building Code Regulations. ***Together, the Built Environment Accessibility Standard and the Nova Scotia Building Code will make a more accessible built environment in Nova Scotia.***

Nova Scotians have been engaged throughout the standard development process. This work could not have been achieved without the invaluable contributions of Nova Scotia's Accessibility Advisory Board and its Built Environment Standard Development Committee.

The Accessibility Directorate will support organizations to understand and comply with the requirements of the standard. A series of awareness presentations will be made available. Materials are available online, including an overview of the standard, a description of the standard in plain language and in ASL, and videos about the standard.

This an exciting milestone in our efforts to create a more accessible province and represents a significant step toward ensuring that all Nova Scotians can participate and thrive.

**Nova Scotia Accessibility Directorate**
Department of Justice
Phone: 902-424-8280
Website: https://novascotia.ca/accessibility/
Email: accessibility@novascotia.ca

**Access includes everyone**

Accessible.novascotia.ca NOVA SCOTIA

**CBRM** *A Community of Communities*

***Cape Breton Regional Municipality***

*Office of Christa Dicks*
*Municipal Clerk*

320 Esplanade
Sydney, Nova Scotia
B1P 7B9
Tel: 902-563-5010

e-mail: ClerksOffice@cbrm.ns.ca
web site: www.cbrm.ns.ca

**March 12, 2025**

**Solarbank**
**803-505 Consumers Rd**
**Toronto, ON M2J 4V8**

**Re: Letter of Support for Submission to Nova Scotia Community Solar Program**

**To Whom it May Concern:**

Please accept this letter on behalf of CBRM Council in support of the proposed Community Solar Project, presented by SolarBank Corp on behalf of 4650799 Nova Scotia Ltd., scheduled for submission to the Nova Scotia Community Solar Program.

As outlined in the presentation, the NS-Eskasoni Rd project promises to provide clean, renewable energy. Members of CBRM Council have reviewed the proposed project's outline, including the background information, site location details, community engagement plan, and the benefits it offers.

We are aware that a Municipal support resolution or letter is a prerequisite for project submission. The CBRM Council supports this initiative as presented, finding it aligned with our community's values and objectives, particularly appreciating the dedication to community engagement. As you are aware, projects must meet all CBRM Planning and Development requirements.

Should you or any members of your team have any questions regarding this letter or CBRM Council support, please contact us at 902-563-5010.

**Sincerely,**

Original Signed by

**Christa Dicks**
**Municipal Clerk**
/slm

Cc: CBRM Mayor and Council
Demetri Kachafanas, Interim Chief Administrative Officer
Tyson Simms, Director of Planning and Development
Mila Simon, Ina Lila, Tracy Zheng, Joel MacNeil, SolarBank Corp