

FINAL REPORT

Greater Saint John Regional Task Force Analysis

Submitted to:

Environment and Local Government, NB

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EXECUTIVE SUMMARY

Introduction

The Saint John Region local governments as well as Local Service Districts have shared goals for economic growth and cost-effective service delivery. The Greater Saint John Regional Task Force is examining opportunities for improvement to shared service delivery and equitable cost-sharing mechanisms. This will enhance the sustainability of Greater Saint John financial performance and community development.

Purpose and scope

This report responds to two key information needs set out by the Regional Task Force, specifically:

- **Benchmarking** - to compare recreation, protective services, road maintenance, and winter storm management services in Saint John versus seven (7) similar municipalities in Canada;
- **Regional cost analysis** – of servicing non-resident use of roads for commuting into Saint John, recreation facilities; and other services or amenities.

Estimates are required for this analysis therefore sources and methods are provided throughout for transparency. A conservative approach to avoid overstating the regional cost estimates has been taken throughout.

Benchmarking results

Amongst the comparison group Saint John is at or near the lowest scores for demographics including population size, household income, and property values. On a per household basis Saint John parks costs are lowest in the group, recreation is in the middle, police costs are also in the middle, and fire services costs are highest. Saint John costs per paved lane-km of road is above the middle, and cost for winter storm management is in the middle of the group. Service metrics are not necessarily calculated the same way across municipalities so results are interpreted with caution.

Regional analysis results

As cities grow out to and beyond their borders, they become regional centres for jobs, amenities, and recreation yet they do not capture revenues from the tax base outside their boundaries. This is a re-occurring challenge in municipal government that is not unique to Saint John. Additional costs to service residents that come from outside Saint John are estimated at \$12.3 million including: \$3.7 million in road costs, \$1.8 million in parks and recreation costs, and \$6.8 million in police, fire, and other costs. Employment growth, population growth, strategic land development and visitor attraction particularly through Saint John City staff, Economic Development Greater Saint John, Develop Saint John, and Discover Saint John involve significant investments by the City that benefit businesses and communities throughout the region. The City's combined investments in regional economic development in 2018 totalled \$2.9 million. Employment growth plays a critical role in the economic development of the region, especially considering that for every 100 employees working in the city limits of Saint John, 41 of the employees chose to live in communities outside of the City.

1. INTRODUCTION

1.1 Background

The Saint John Region is a key contributor to the provincial economy by generating 20 to 25% of provincial GDP¹. In the past ten (10) years approximately 28% of the provinces non-residential construction has taken place in Saint John¹. Neighbouring communities are highly dependent on Saint John for access to employment and a wide range of services and amenities.

The Saint John Region local governments as well as Local Service Districts have shared goals for economic growth and cost-effective service delivery. The Greater Saint John Regional Task Force is examining opportunities for improvement to shared service delivery and equitable cost-sharing mechanisms. This will enhance the sustainability of Greater Saint John financial performance and community development. There is a pressing need for economic analysis to support on-going discussions and engage key audiences in developing long-term strategies.

1.2 Purpose and scope

This report responds to two key information needs set out by the Regional Task Force, specifically:

- **Benchmarking** - to compare service delivery in Saint John versus similar municipalities elsewhere in Canada including:
 - Municipalities - Saint John's NL, Sarnia ON, Prince George BC, Sault Ste Marie ON, Greater Sudbury ON, Cape Breton Regional Municipality NS, and Thunder Bay ON; and
 - Services – recreation, protective services, road maintenance, winter storm management;
- **Cost analysis** – of servicing non-resident use of:
 - Roads for commuting into Saint John;
 - Recreation facilities; and
 - Other services or amenities.

¹ Government of New Brunswick. 2019. Sustaining Saint John: A Three-Part Plan.

2. RESULTS

2.1 Benchmarking

The demographic and economic context for benchmarking is important to consider before examining the specific service area metrics. The following highlights are based on Statistics Canada 2016 Census records for seven (7) other municipalities.

As the population and number of households grows in a community there is a greater financial ability to support more infrastructure and programs.

- ❑ **Population** – Saint John has the smallest population in the benchmarking group by about 11,000 behind Sault St. Marie, and the largest is St. John's at 212,501.
- ❑ **Households** – Saint John also has the fewest households at 34,070, while St. John's has the most at 85,015.

Higher household incomes drive investment in properties, and property values determine the tax base supporting municipal revenues.

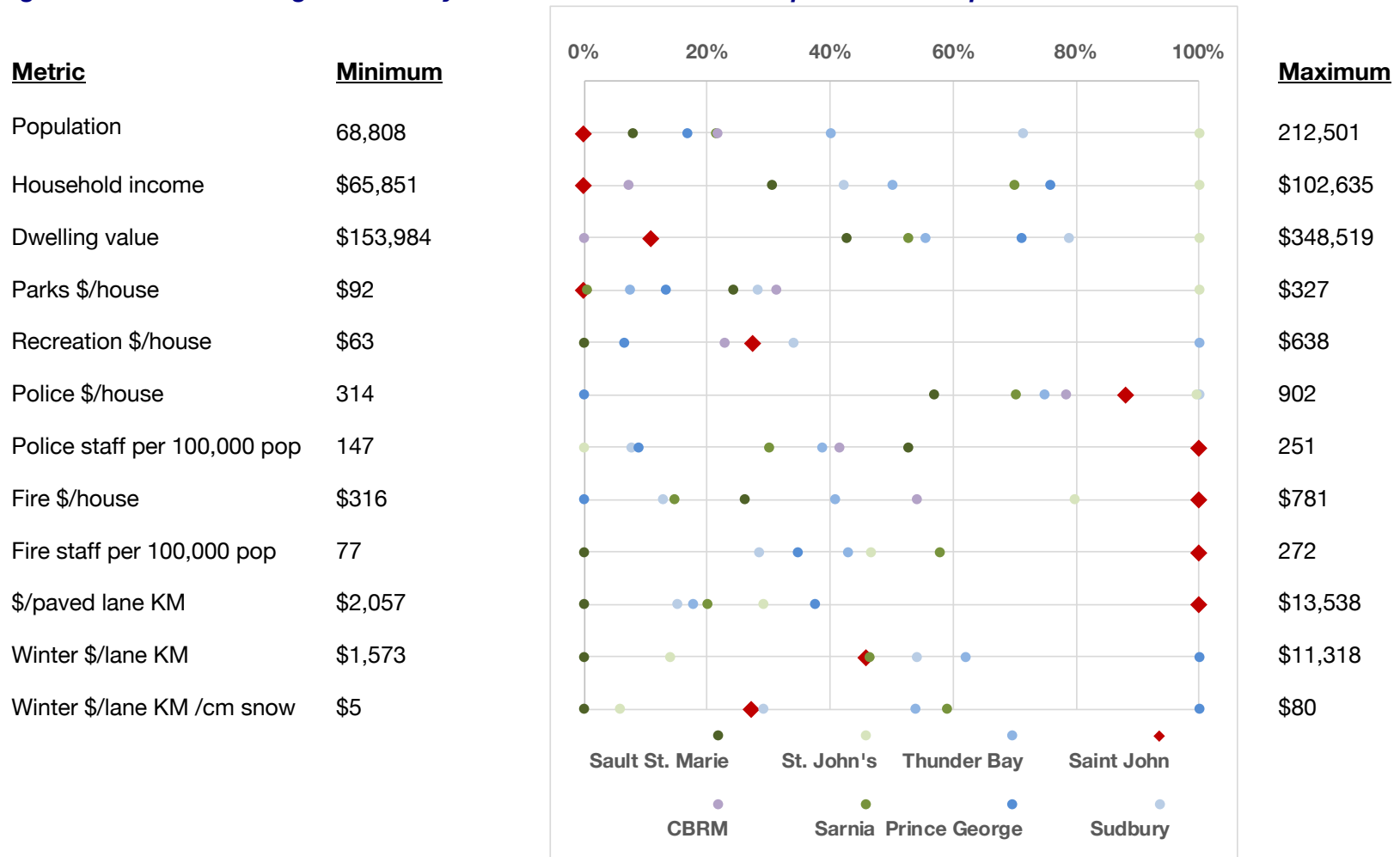
- ❑ **Household income** – Saint John has the lowest average household income at \$65,851, and St. John's again tops the list at \$102,635.
- ❑ **Residential property values** – The average value of private dwellings is lowest in Cape Breton Regional Municipality (CBRM) at \$153,984, Saint John is second lowest at \$175,139, and the highest is St. John's at \$348,519.

Poverty and unemployment are among the key socio-economic determinants of demand for support services and interactions with the criminal justice system.

- ❑ **Poverty** – The percentage of population below the low income cutoff after tax (LICO-AT) is highest in Saint John (13.0%), while Sarnia has the lowest at 7.1%.
- ❑ **Unemployment** – Saint John has the third highest unemployment rate at 9.6%, behind Sault St. Marie (10.3%), and CBRM (17.4%).

The next chart shows how Saint John compares to other municipalities in Canada, based on measures shown in the table that follows. Key observations are summarized after the chart and table. Saint John data are provided by the City except where Statistics Canada sources are noted. Sources for all other municipalities are listed in the benchmarking references section of this report (Section 3).

Figure 2.1: Benchmarking chart of key service metrics across comparable municipalities in Canada



Note: Minimums and maximums are the lowest and highest values across municipalities, and the markers represent each municipality according to their position between the minimum and maximum. Some municipalities do not have measures for certain metrics so no marker is shown.

Table 2.1: Benchmarking values for key service metrics across comparable municipalities in Canada

	Saint John NB	Sudbury ON	Thunder Bay ON	Prince George BC	St. John's NL	Sarnia ON	Sault St. Marie ON	CBRM NS
Demographics								
Pop. (July 1, 2018)	68,808	171,471	126,481	92,792	212,501	99,625	80,031	100,000
No. households ¹	34,070	70,445	52,545	35,095	85,015	28,330	34,530	41,675
Household income ¹	65,851	81,378	84,321	93,755	102,635	91,592	77,048	68,465
% Low income pop ¹	13.0%	10.7%	7.9%	7.6%	7.5%	7.1%	7.9%	8.3%
House values ¹	175,139	307,296	261,881	292,077	348,519	256,520	236,729	153,984
Unemployment rate ¹	9.6%	9.0%	7.7%	9.1%	8.6%	8.8%	10.3%	17.4%
Parks and Recreation								
Parks cost	3,141,463	11,130,183	8,670,000	3,831,108	10,453,750	9,256,213	3,207,696	6,207,224
Recreation cost	7,525,146	18,225,889	10,232,000	22,378,000	8,511,161	-	6,124,256	2,639,463
Parks cost per cap.	46	65	69	41	49	93	40	62
Recreation cost per cap.	109	106	81	241	40	-	77	26
Parks cost per house	92	158	165	109	123	327	93	149
Recreation cost per house	221	259	195	638	100	-	177	63
Police								
Total cost	28,344,333	63,548,588	40,706,000	26,438,856	26,673,442	25,491,171	25,096,639	26,994,915
Cost per capita	412	371	322	285	126	256	314	270
Cost per household	832	902	775	753	314	900	727	648
Staff per 100,000 pop ²	251	155	190	188	157	147	179	202
Number of staff	173	266	241	174	333	147	143	202

1. Statistics Canada 2016 Census

2. Statistics Canada Police personnel and selected crime statistics, municipal police services, 2019.

Note: Some values are not shown since data is not readily available from all municipalities.

(Table 2.1 continued)	Saint John NB	Sudbury ON	Thunder Bay ON	Prince George BC	St. John's NL	Sarnia ON	Sault St. Marie ON	CBRM NS
Fire								
Total cost	26,604,450	26,387,749	29,796,000	17,724,328	26,822,880	19,440,769	13,247,554	18,201,994
Cost per capita	387	154	236	191	126	195	166	182
Cost per house	781	375	567	505	316	686	384	437
Staff per 100,000 pop.	272	77	170	116	94	126	157	-
Number of staff	187	132	215	108	200	126	126	-
Cost per service vehicle-hr	296	273	252	-	-	-	-	-
Road Maintenance								
Total cost	15,866,638	5,936,695	15,684,000	1,768,928	7,089,901	3,631,473	3,296,959	-
Cost per paved lane KM	13,538	2,057	9,270	2,407	5,064	3,947	2,700	-
Winter Management								
Total cost	6,101,606	17,648,624	4,121,480	5,147,929	15,844,539	1,447,578	6,420,589	-
Cost per lane KM	5,206	6,115	2,436	7,004	11,318	1,573	5,258	-
Annual snowfall (cm)	240	263	163	142	335	112	321	283
Cost per lane km per cm snow	21.7	23.3	14.9	49.3	33.8	14.0	16.4	-

Summary observations:

- ❑ **Parks and recreation** – Saint John operating costs per capita for parks are third lowest in the group, and the lowest on a per household basis. Saint John recreation operating costs per capita are second highest in the group, and in the middle of the group on a per household basis.
- ❑ **Police** – The number of Saint John police per 100,000 population is the highest in the group, cost per household is second highest, and cost per capita is highest in the group (note: pension costs may be included in some cities, but not others).
- ❑ **Fire** – Saint John has the highest cost per capita, per household, and per in-service vehicle hour (compared to two others). Heavy industry fire services costs in Saint John are discussed further in this report.
- ❑ **Road maintenance** – Saint John cost of paved road maintenance per lane kilometer is the highest of the group.
- ❑ **Winter storm management** – Saint John costs per lane kilometer are in the middle of the group, and third lowest when snowfall amounts are taken into consideration.

2.2 Cost analysis

The city is struggling to support operational costs while many enjoy a short commute from outside communities where property tax rates are lower. Higher average household incomes and property values are also common outside the city, but exurban commuters do not help pay for the city services they enjoy every day. Sound familiar? This actually describes Winnipeg according to a publication just released in October, 2019². Winnipeg is also facing uncertain provincial funding support, yet it contributes to 70% of the province's gross domestic product. These challenges are not unique to Saint John, in fact this is a common problem for cities where development extends to the municipal boundary and residential growth has accelerated just beyond the border.

The following analysis of costs not paid by residents from outside Saint John focuses on three areas: 1) road related costs, 2) parks and recreation costs, 3) police and fire services, and 4) regional economic development. The approach aims to be conservative since the full costs of these three service areas are not captured, and other City of Saint John services are not included. The summary of total shares by cost area are shown in the table below and the explanations for each calculation follow.

Table 2.2: Total share of operational costs for residents outside Saint John

Service	Costs
Road costs	\$3,753,352
Parks and recreation costs	\$1,760,919
Police, fire, and other costs	\$6,781,038
Total	\$12,295,309

Road costs

Commuters into Saint John rely on the road network maintained by the city including: road maintenance, traffic management, snow removal, re-paving, cleaning, stormwater management, and sidewalks. The following table shows the 2019 approved operating budget for road related costs, cost-recovery, and net costs amounting to just over \$19 million.

² Riley Black. 2019. The high cost of free-riding and how we fix it: Examining the implementation of commuter fees in Winnipeg. Canadian Centre for Policy Alternatives Manitoba.

Table 2.3: Road-related costs in Saint John 2019 budget

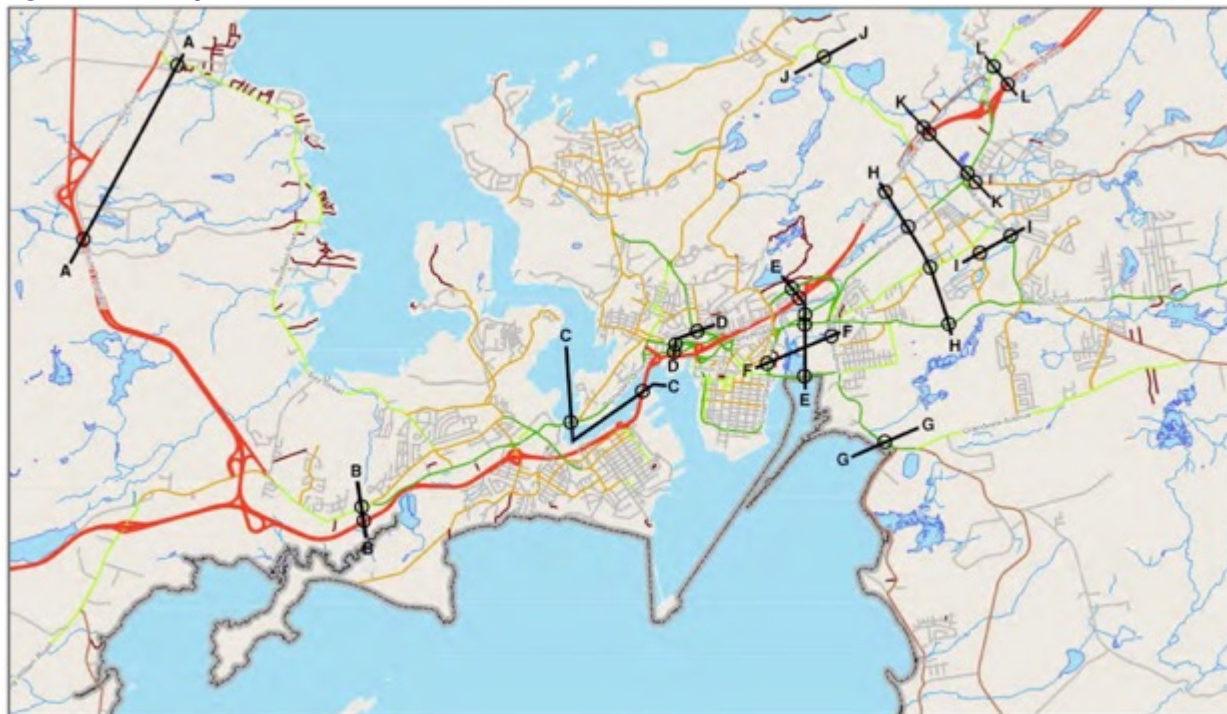
Service	Costs	Recovery	Net Costs
Snow control on streets	\$ 5,781,383	-	\$ 5,781,383
Street cleaning	\$ 1,670,600	-	\$ 1,670,600
Street maintenance	\$ 6,122,629	250,000	\$ 5,872,629
Snow control on sidewalks	\$ 1,102,170	-	\$ 1,102,170
Sidewalk maintenance	\$ 705,582	-	\$ 705,582
Traffic management	\$ 2,292,512	\$ 368,000	\$ 1,924,512
Stormwater management	\$ 3,570,935	-	\$ 3,570,935
Asphalt renewal ¹	\$ -	1,500,000	-\$ 1,500,000
Temporary pension amts	\$ 819,279		\$ 819,279
Total	\$ 22,065,090	\$ 2,118,000	\$ 19,947,090

Source: Saint John 2019 Approved Operating Budget

1. Average 2016-2019 capital budget.

In 2014, traffic volumes were measured at locations that capture Saint John inflows and outflows of traffic at weekday peak morning and afternoon times (e.g. commuters).

Figure 2.2: Map of Saint John traffic count sites



Counts at locations D-D, E-E, and F-F shown in the map above are not included to be cautious about vehicles moving within the city, and the inbound morning traffic amounts to 21,375 vehicles, while outbound traffic totals 13,338. Statistics Canada reports an average of about 1.30 passengers per vehicle for weekday commuters in

Saint John³. This yields a potential of 27,865 inbound passengers just at the peak period (not including mid-day, evening, or weekend traffic). These are not all necessarily commuters since some may be on the move for work, trips to school, shopping, and other purposes.

The 2017 Phase I MoveSJ report focuses on commuter travel patterns for inbound and outbound vehicles according to north, south, east, and west locations inside and outside the city (see table below)⁴. The survey indicates about 15,700 people come from outside the city for work. This is similar to Statistics Canada Census 2016⁵ commuting statistics for Saint John and neighbouring communities of Rothesay, Quispamsis, Hampton, Grand Bay-Westfield, Saint Martins, Simonds, and Musquash. The daily number of weekday commuters to Saint John is between 13,625 and 17,695.

Table 2.4: Household survey results for inbound travel to Saint John (2015)

External	SJ North	SJ East	SJ South	SJ West	Total
Northeast	2,310	2,800	4,700	1,110	10,920
Southeast	400	920	180	70	1570
Southwest	200	180	350	310	1040
Northwest	670	420	490	590	2170
Total	3,580	4,320	5,720	2,080	15,700

The survey also found for residents outside the city that 27.2% of their trips are for work, 3.9% are for school, and 68.9% are for other purposes. Although some trips for school may take them into Saint John, these are mainly assumed to be within their local community. However, the other trips would include shopping, appointments, events, and other activities in Saint John. Taking the ratio of “other trips” to “work trips” (68.9% versus 27.2%) another 2.53 trips are into Saint John are expected for every commuting trip to work. The other trips are not necessarily by commuters, and the ratio simply applies to general travellers from outside the city. This indicates about 55,500 trips are taken into the city per weekday.

The household survey found the total daily number of trips (all types) by Saint John residents was 239,560. Therefore the combined total trips was about 295,100, where 19% originate outside the city, and 81% are by Saint John residents. Applying the 19% share to the road related costs results in a \$3.8 million estimate for shared costs.

Parks and recreation costs

Parks and recreation costs focus on the operational costs for arenas, sportsfields, and parks (see table below). The share of arena and sportsfield users coming from outside

³ Statistics Canada. 2016 Census of Population, Statistics Canada Catalogue no. 98-400-X2016327.

⁴ IBI Group. 2017. Move SJ Final Report - City of Saint John Transportation Strategic Plan: Phase I.

⁵ Statistics Canada. Census 2016 Population Profile. Catalogue no. 98-316-X2016001.

the city is shown in the table below and used to calculate a corresponding share of costs. There is no tracking for use of parks so the lower of the two tracking-based shares (31%) is applied to park costs. The total estimated share of costs is \$1.8 million for those coming from outside the city. City of Saint John temporary special pension costs are not included in these estimates.

Table 2.5: Parks and recreation-related costs in Saint John 2019 budget

Service	Costs	Recovery	Net Costs	% Share	Cost Share
Arenas	\$1,661,801	\$681,850	\$979,951	31%	\$308,063
Sportfields	\$1,429,986	\$152,758	\$1,277,228	34%	\$435,799
Parks	\$2,769,755	-	\$2,769,755	31%	\$870,715
Temp. pension	\$457,320		\$457,320	32%	\$146,342
Total	\$6,318,862	\$834,608	\$5,484,254	32%	\$1,760,919

Police, fire and other services

Saint John must provide adequate public safety in the form of police, fire and emergency preparedness capacity for everyone in the municipality regardless of their origin. This includes capabilities to respond to incidents at workplaces, throughout the road network, and other areas of the city.

Saint John also maintains infrastructure and operations for facilities such as Market Square that support regional events and activities. The Trade and Convention Centre along with attractions for cruise ship visitors and other tourists all contribute to regional business development and enjoyment by residents from inside and outside of Saint John.

Table 2.6: Police, fire, and other costs in Saint John 2019 budget

Service	Costs	Recovery	Net Costs
Police Services	\$28,765,324	\$320,000	\$28,445,324
Fire Services	\$27,425,632	\$82,600	\$27,243,032
Market Square Costs	\$2,182,993		\$2,182,993
Solid Waste Management	\$3,722,605		\$3,722,605
Total	\$62,096,554	\$502,600	\$61,593,954

Estimating a share of costs for those coming into the city starts with police and fire services costs. The following does not include City of Saint John temporary special pension costs. The 2019 local government statistics for New Brunswick⁶ show these costs for Saint John, Quispamsis, Rothesay, Grand Bay-Westfield, and Hampton (table below). Using the municipal tax base in each community as the basis for allocating the total costs, the communities outside Saint John move from paying \$7.6 million for police to paying \$12.7 million. Likewise for fire services the communities outside move

⁶ New Brunswick Environment and Local Government. 2019. Local Government Statistics for New Brunswick.

from paying \$6.9 million to \$12.0 million. The differences for police (\$5.1 million) and fire (\$5.2 million) combine for a total contribution of \$10.3 million.

Table 2.7: Shared police and fire costs based on municipal tax base (2019)

Service	Mun tax base	Actual police	Shared police	Actual fire	Shared fire
Saint John	\$6,925,108,650	\$28,445,324	\$23,299,923	\$27,243,032	\$22,059,978
Quispamsis	\$1,748,060,900	\$3,689,260	\$5,881,451	\$3,689,079	\$5,568,459
Rothesay	\$1,293,791,950	\$2,429,920	\$4,353,037	\$2,105,864	\$4,121,383
Grand Bay- Westfield	\$375,785,600	\$697,794	\$1,264,352	\$682,837	\$1,197,067
Hampton	\$365,177,400	\$765,125	\$1,228,660	\$389,350	\$1,163,275
Total	\$10,707,924,500	\$36,027,423	\$36,027,423	\$34,110,162	\$34,110,162

This approach would leave outside communities contributing to 18% of Saint John police service and 19% of fire service. A proportional share of 18% could then be applied to the costs of Market Square and waste collection to determine contributions of \$415,000 and \$707,000 respectively. The total contribution to costs from outside communities would be \$11.4 million.

However, considering that residents from outside communities spend less time in Saint John and travel there for work and other activities, the measure of traffic inflows from the road cost analysis may be applicable. Recall from the household survey that the combined total trips of 295,100 in Saint John are comprised of 19% originating from outside the city, and 81% from Saint John residents. Applying the 19% rate to the total contribution figure of \$11.4 million reduces this to about \$2.2 million. The \$6.8 million midpoint of the \$2.2 million and \$11.4 million estimates would be considered reasonable.

Regional economic development

The City of Saint John is actively involved in strategic operational and capital investments that are intended to not only generate economic returns for the City, but the entire region. In addition to an annual investment of \$2.3 million into three unique economic development agencies, the City also supports economic development through in-house employees and programs (\$600,000 annually) focused on economic development coordination and growth (table below). The City houses a population growth function, which seeks to address the region's weak demographic growth. While the majority of newcomers choose to live in the City of Saint John, approximately 20% of all newcomers to the region choose to live in towns that fall outside of the City. The City has also created a Growth Reserve Fund (\$350,000 annually), which was established to respond to unforeseen economic opportunities and challenges. All City of Saint John investments in regional economic development initiatives is estimated at \$2.9 million/annually.

Table 2.8: City of Saint John investments in regional development, 2018

Economic Development Functions	2018 Investments (GBW, Quispamsis, Rothesay, St. Martins, Hampton)	2018 Investment (Saint John)
Enterprise Saint John	\$225,210	\$475,000
Develop Saint John	n/a	\$821,002
Discover Saint John	\$12,000	\$1,033,495
Growth Reserve	n/a	\$350,000
City staff supporting growth	n/a	\$250,000
TOTAL:	\$237,210	\$2,929,497

Source: City of Saint John

The City of Saint John also works closely with Port Saint John to host cruise ships, coordinate events, and make use of City infrastructure. The port brought 175,000 cruise ship passengers⁷ to the city in 2018. An estimated \$93 per passenger is spent during a visit for a total of \$14.9 million⁸ annually. Port Saint John confirmed cruise bookings for over 200,000 passengers in 2019 and 2020. Passengers book day excursions through cruise tour operators and explore Saint John and surrounding areas as far as Hopewell Rocks, Saint Andrews, and St. Stephens. Local businesses capture passenger spending on recreation, food, local transportation, and souvenirs.

Regional communities outside of Saint John invest a combined total of \$237,210 annually into economic development, through their combined \$225,210 investment into Economic Development Greater Saint John as well as a minor community partnership investment into Discover Saint John (the towns of Rothesay, Quispamsis, Grand Bay Westfield and Hampton each pay \$3,000 into the community partnership annually).

The three City-funded economic development agencies are:

Economic Development Greater Saint John (EDGSJ) is the economic development agency for Greater Saint John, which encompasses the communities of Grand Bay-Westfield, Saint John, Rothesay, Quispamsis, and St. Martins. The agency focuses on four economic growth areas: 1) workforce development, 2) business investment and innovation, 3) entrepreneur development, and 4) marketing greater Saint John. Specific goals and targets for 2018 involve supporting 37 new start-up businesses and 821 new job hires (896 announced). Business start-up and job hiring benefits extend beyond Saint John. The City provides \$475,000 of the \$700,000 in municipal funding, combined with investments from the Province (\$273,000), strategic partners and private sector (\$246,000), and project revenues (\$990,000). Employment growth plays a critical role in the economic development of the region, especially considering that for every 100

⁷ Port Saint John, 2019.

⁸ Business Research and Economic Associates, 2016. Economic Impacts of the Cruise Industry in Canada. (online: <https://clia-nwc.com/>)

employees working in the City limits of Saint John, 41 of the employees chose to live in communities outside of the City⁹.

Discover Saint John (Discover SJ) is the Destination Marketing Organization for Saint John, and while it promotes the region as a travel destination it also takes a lead role in organizing festivals and events that bring many visitors to the region. The agency successfully hosted the 2018 World Under-17 Hockey Challenge in Saint John and Quispamsis¹⁰. Discover SJ also aims to host the 2021 Acadian Games¹¹. The attraction of visitors leads to spending beyond the city for accommodation, food, entertainment, transport and fuel, and many other retail purchases. City of Saint John provided \$1,033,000 towards the \$1.9 million in Discover SJ costs for 2018, the balance is largely funded by the Hotel Association, event revenues, and sponsorships.

Develop Saint John (Develop SJ) is the strategic real estate agency entirely funded by the City of Saint John (\$821,000 annually). The agencies 2018 goal was to generate an increase of \$75 million in new tax base growth from the City. The agency supports residential, commercial, institutional and industrial developments, which supports tax base growth for Saint John, but also delivers short-term employment opportunities for the construction of the projects as well as longer-term employment opportunities as a result of the companies that move into the developments, which are filled by residents from across the region.

⁹ Statistics Canada, 2016. 2016 Census: Place of Work. Catalogue Number 98-400-X2016325.

¹⁰ Hockey Canada, 2017. Hockey Canada Selects Saint John, Quispamsis as Co-Hosts of the 2018 World Under-17 Hockey Challenge. (online: <https://www.hockeycanada.ca/en-ca/news/2018-wu17hc-returns-to-new-brunswick>)

¹¹ CBC News, 2017. Saint John looks to host the 2021 Acadian Games. (online: <https://www.cbc.ca/news/canada/new-brunswick/saint-john-looks-to-host-2021-acadian-games-1.4157831>)

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