BE READY, OR BE LEFT BEHIND

**Report of the Advisory Panel
on Metro Edmonton's Future**

May 31, 2016

APPENDICES 4 - 5

Appendix 4 – Annotated Bibliography

Is a globally competitive Edmonton Metro Region achievable? What does success look like? What are the factors required to get us there? What needs to be done differently in the region to achieve results? In setting out to answer these questions, the Panel considered a wide range of government reports and academic articles on inter-municipal cooperation.

Alberta Capital Region Steering Committee. "Capitalize: The Economic Roadmap for Alberta's Capital Region." 2011.

This report provided the Capital Region Board with a vision for Alberta's Capital Region, arguing that a coherent and focused collaborative approach was needed for the region to emerge as a significant city-region on the world stage. The report's recommendations include strengthening regional management, improving the arena of education and training, participating in the economic and social development of the circumpolar north, attracting businesses and developing transportation links to, from and within the region.

Alberta Capital Region Steering Committee. "Volume 1: Edmonton Metropolitan Region Economic Development Framework." June 4, 2015.

The Edmonton Metropolitan Region Economic Development Framework represents a long-term agreement to be signed by different parties in the Alberta Capital Region. The vision is "To be a business location of choice for global investment, by collaboratively building on regional assets." Making the distinction between local, sub-regional and regional levels, the authors argue the top three priority areas are regional: marketing, talent and industry.

Alberta Capital Region Steering Committee. "Volume 2: Edmonton Metropolitan Region: Economic Development Strategy 2015-2018." May 21, 2015.

This document for the Capital Region Board contains a strategy reflecting the insights of regional economic development professionals on how to prepare Alberta's Capital Region to succeed in a globally competitive metropolitan environment. At the core of this strategy is a commitment to collaboration. Priorities for the coming five years include unified marketing, attracting talent and growing and diversifying industry. This is a sister document to "The Economic Development Framework," which outlines a framework for collaboration, the organization and the funding model for the initiative.

Alberta Municipal Affairs. "Collaborative Governance Initiative." http://www.municipal-affairs.alberta.ca/mdrs_collaboration.

The provincial government's Collaborative Governance Initiative (CGI) offers Municipal Dispute Resolution Services that can help municipalities assess whether collaborative governance is an appropriate fit, help convene the process, and ensure that prerequisites are in place. It provides a few samples under "Protocols, Agreements & Successes" of successes involving the CGI, including the Common Bonds Agreement between Strathcona County and the City of Fort Saskatchewan.

Aquatera Utilities Inc. https://aquatera.ca/.

Aquatera is a full-service utility company formed by the City of Grande Prairie, County of Grande Prairie and Town of Sexsmith. This for-profit corporation has a vision of being "the most innovative municipal company in Canada by 2020." Aquatera serves as an example of two or more municipalities forming a for-profit corporation with the minister's approval and transferring assets to that corporation to help it achieve its objectives.

BCTransit. "Victoria Regional Transit Commission." http://bctransit.com/*/about/funding-and-governance/victoria-regional-transit-commission.

AND

BCTransit. "Victoria Regional Transit System: SD62." School District 62 – Transportation Public Meeting: Sooke. January 21, 2016.

BCTransit is a provincial authority responsible for the planning, funding and operation of all transit in the province outside of Metro Vancouver. The Victoria Regional Transit Commission makes decisions regarding transit services and funding in the Victoria region, more specifically. It consists of seven elected local government officials appointed by the Lieutenant Governor in Council, and two Commission members are appointed as directors of BCTransit.

Bish, Robert. "Amalgamations: Discredited Nineteenth-Century Ideals Alive in the Twenty-First." C.D. Howe Institute, 2001.

This source makes a case against amalgamation and large, central bureaucracies. It argues that smaller governments are more responsive to their citizens than large bureaucracies. The benefits of amalgamating, on the other hand, are rarely realized. Not only is money not necessarily saved by centralizing authority, according to the article, approximately 80 percent of local government activities don't benefit from economies of scale. The activities that do possess economies of scale are those needed infrequently by municipalities, such as homicide investigation or traffic light maintenance or a few very large capital facilities, such as landfills. "In summary, there is overwhelming evidence that *the least expensive local governments* are found in polycentric systems of small and medium-sized municipalities that also cooperate in providing those services that offer true economies of scale (p. 20)." This source also compares different approaches used throughout Canada, including the model used in British Columbia.

Bish, Robert L. "Amalgamation: Is it the Solution?" Prepared for The Coming Revolution in Local Government conference. Halifax: Atlantic Institute for Market Studies, 1996.

This paper discusses the merits and disadvantages of both single-tier municipal reforms and two-tier municipal reforms, and it discusses an alternative way of thinking that isn't a "tier" model. The arguments essentially come down to a "debate over multi-organizational versus centralized control." According to the author, "The observation that a multiplicity of individuals and organizations can function together for mutual benefit without central direction is one of the most important insights in the history of human thought." After exploring regional collaboration at the inter-municipal level, the author argues in favour of deeper mechanisms of collaboration.

Bouma, Jerry. "Capital Region Board Growth Plan Update: Agriculture Working Paper." January 10, 2016.

This report for the Capital Region Board asserts that the province has failed to provide specific guidelines regarding the use of agricultural lands in the region and so the onus to establish policies is now on the municipalities. The report's purpose is to provide background information and policy recommendations for the CRB to use when updating the *Capital Region Growth Plan*. The report notes that municipalities in the region currently have differing approaches to agricultural land use planning, which the author argues "leads to differing rates of land conversion, fragmentation and impacts to the agricultural industry at large."

Bruce, Brittany M. "Collaboration and Regional Economic Development: A Comparison of North Country, New York and Four Counties, Ontario." Master's thesis. Waterloo, ON: University of Waterloo, 2014.

This is a Master's thesis that studies collaborations related to agriculture and economic development in North County, NY and Four Counties, ON. It explores key factors for success or failure, barriers to cooperation and implementation challenges. The author finds that regional collaboration is not a universal solution to economic challenges for all jurisdictions and may be more successful at an intra-county scale. Furthermore, it finds that a vast geography, lack of an urban centre and insufficient resources facilitate collaboration. She notes that stakeholders are increasingly encouraging collaboration because they are "beginning to understand the limits of what they can achieve as individual organizations" and "provincial, state and federal levels of government increasingly want to interact with only one entity at a regional level to increase efficiency."

Capital Region Board. "Capital Region Land Use Plan." March 12, 2009.

The primary purpose of this CRB plan is to "manage sustainable growth that protects the region's environment and resources, minimizes the regional development footprint, strengthens communities, increases transportation choice and supports economic development." According to the CRB, the document aims to accomplish these objectives through an integrated and strategic approach to planning which coordinates planning and development decisions in the region and identifies a regional development pattern to complement existing infrastructure, services and land uses.

Capital Region Board. "Growing Forward Fact Sheet: Land Supply and Regional Development Footprint." N.d.

This brief document provides the status of the Alberta Capital Region's current land supply. Making the distinction between "absorbed land supply" and "unabsorbed land supply, this document asserts that "the Capital Region has a sufficient supply of lands to accommodate future residential, commercial and industrial growth over the next 35 years and beyond." The bottom of the first page notes that one of the core principles of the Capital Region Growth Plan is to minimize the "regional development footprint" and that applying density targets will do this.

Capital Region Board. "Growing Forward Fact Sheet: Priority Growth Areas." N.d.

This fact sheet explains that there are seven "Priority Growth Areas" (PGAs) in the Alberta Capital Region. These are the areas where the Capital Region Growth Plan intends for most new growth to occur. It's important to note that the CRB has signalled its intention to replace PGAs with three new policy tiers in its updated Growth Plan.

"Capital Region Intermunicipal Transit Network Plan." Growing Forward, Appendix 3. March 2009.

Based on the land use scenarios considered during the development of the Capital Region Growth Plan, the plan is intended to provide guidance to the Capital Region for regionally integrated and coordinated transit service planning and delivery. Its recommendation include moving forward with "quick wins" (i.e. transit initiatives and projects that are regionally beneficial and which can be implemented relatively quickly), establishing a new urban transit section within Alberta Transportation and developing a mechanism to enable municipalities to share the costs associated with the delivery of inter-municipal transit services.

City of Edmonton. "The Way We Grow: Municipal Development Plan." Bylaw 15100.

This source is the City of Edmonton's Municipal Development Plan to accommodate growth and aid in the evolution of a sustainable, healthy and compact city. Arguing that the city "recognizes the merits of managing growth and is committed to the success of the Capital Region Growth Plan," this plan focuses on land use planning in particular.

City of Edmonton. "The Way We Move: Transportation Master Plan." September 2009.

Acknowledging that land use and transportation are inextricably linked, this plan is based on seven transportation strategic goals, including transportation and land use integration, well-maintained infrastructure and economic vitality. Each of these goals embodies the four guiding principles: integration, sustainability, livability and innovation. The purpose of the plan is to guide policies and direction on how best to manage Edmonton's transportation system to contribute to a city that is "safe, vibrant, economically robust, culturally active and environmentally sustainable."

City of Edmonton. "The Way We Prosper: The City of Edmonton's Economic Development Plan." March 2013.

This source provides a vision of the City of Edmonton's future to help set direction and encourage different parties to align their priorities. It notes that "aligning the economic development focus of 20 municipalities in the region is also seen as difficult." The report also identifies "key constraints" Edmonton faces when competing with neighbouring municipalities for new business investment. It also has a section In "The Drive for Talent," it notes a global trend to adopt strategies aimed at retaining and attracting talented labour.

City Regions Task and Finish Group. "City Regions Final Report." Welsh Government, July 2012.

This report identifies potential city regions in Wales and explores how adopting a "city region approach" might benefit the economy. It argues that city regions in Wales "should be free to explore best-fit governance arrangements based on global good practice, recognizing that different levels of governance are required for different policies. The focus must be on what a change in governance is intended to achieve, not the process itself." This source also touches on economic development, concluding that "a city region approach in Wales could deliver three main economic benefits: larger and more efficient labour markets, larger potential markets for goods and services, and a greater exchange of knowledge, ideas and innovation."

Clark, Greg, and Tim Moonen. "The 10 Traits of Globally Fluent Metro Areas: International Edition." Brookings Institution, 2013.

The aim of this report is to provide insights for cities that are "forging their own new approaches toward the opportunities and challenges in a globalizing economy." It summarizes ten traits that define "globally fluent" metropolitan areas and that have proven to be strong determinants of an area's ability to succeed in global markets, including "open and opportunity-rich" and "international connectivity."

Cox, Wendell. "Reassessing Local Government Amalgamation." Frontier Centre for Public Policy. February 2004.

Provideing evidence from the United States that larger, amalgamated municipalities spend more per capita to operate than do smaller municipalities, this source demonstrates some of the pitfalls of amalgamation. Still, Cox says that a few functions of municipal government are better administered at a metropolitan level, such as highways and public transit.

Dawes, Sharon S., and Lise Préfontaine. "Understanding New Models of Collaboration for Delivering Government Services." *Communications of the ACM 46*, **no. 1 (January 2003).**

Featuring a number of cases studies, this short article demonstrates that fundamental elements of collaboration transcend cultural and national boundaries. It finds that collaboration rests on an understood (but often tacit) working philosophy, that collaboration efforts offer continuous opportunities for feedback, collaborators face issues regarding data ownership rights, multi-organization collaborations need an institutional framework, and technology choices have important effects on participants and the results.

Dawson Regional Planning Commission. http://dawson.planyukon.ca/

AND

Yukon Land Use Planning Council. "About Us." http://www.planyukon.ca/index.php/about-us-2.

In December 2014, the Government of Yukon, Tr'ondëk Hwëch'in and Vuntut Gwitchin Government made public a joint decision to suspend the Dawson Regional Land Use Planning process due to a matter before the courts that directly relates to the process. The Yukon Land Use Planning Council is currently active, however, and has three members who serve three-year terms. Its mandate is to make land use planning recommendations to the government and to First Nations.

Dell and Intel. "Preparing Local Economies for the Future." *Harvard Business Review*, **January 12, 2016.**

This article argues that the formula city planners need to follow to attract industries to their region is changing. Technology has made information ubiquitous and so virtual infrastructure is more important for many companies than the physical infrastructure that cities traditionally use to attract them. Experts at the 2015 Strategic Innovation Summit identified three major enablers for cities/communities to focus on: 1) attract and nurture human capital, 2) foster collaborative, growth-oriented commercial environments and 3) build an enabling foundation of technology, telecom and physical infrastructure.

Edmonton Economic Development. "Navigating Your Economic Future in Edmonton." January 2015.

The purpose of this workbook is to guide businesses in planning for economic possibilities likely to occur in Alberta's future, considering the possibility of four different scenarios, including "Oil Kings No More."

Federation of Canadian Municipalities. "Cities and Communities: Partners in Canada's Future." 2015.

This report contains proposals for the federal government to partner with municipalities to strengthen Canada's future. The Federation of Canadian Municipalities is a valuable agency for collaboration among municipalities and other levels of government that would be a valuable resource to a regional body, especially its Municipal Infrastructure Forum. The report proposes a number of solutions for infrastructure and public transit.

Found, Adam, Benjamin Dachis and Peter Tomlinson. "The 2014 C.D. Howe Institute Business Tax Burden Ranking." C.D. Howe Institute E-Brief, October 29, 2014.

This report contains the results of measuring the tax burdens of the largest cities in each province, arguing that prevailing tax-burden estimates are incomplete because they are missing business property taxes and land transfer taxes. It ranks the tax regimes of Calgary and Saskatoon as the least burdensome in Canada. The report recommends that municipalities "should reduce investor uncertainty by announcing a time-path of tax rates for future years."

Garcea, Joseph, and Edward C. LeSage Jr., eds. *Municipal Reform in Canada: Reconfiguration, Re-Empowerment, and Rebalancing*. Canada: Oxford University Press, 2005.

This book contains analyses of municipal reform initiatives, whether implemented or not, in each of Canada's provinces and in the territories. This source provides a means to compare different municipal reforms efforts tried in Canada. A section "Products of the Municipal Reform Initiatives: The Outputs" in the final chapter provides a comparative overview of four types of reform: structural, functional, financial and jurisdictional.

Gibson, Ryan. "A Primer on Collaborative Multi-Level Governance." Canadian Regional Development, May 2011.

This source discusses various definitions for the concepts of "governance," "multi-level" and "collaborative." Drawing on other authors' work, it says the region is a manageable scale for designing regional development policies and programs. Furthermore, new regionalism represents a movement by the nation states to shift towards pluralistic governance to better respond and coordinate policies and programs at the regional level.

Golden, Anne. "The Case for Regionalism Revisited." Speech for Toronto Region Economic Summit, March 29, 2012.

This source is a copy of a speech given by Anne Golden, who was asked in 1995 to chair a task force on the future of the Greater Toronto Area. The task force had highlighted some priorities for change, and 17 years later, Golden says that many of the issues flagged have not been addressed: the neglect of municipal physical infrastructure, a failure to integrate land use and transportation planning and a governance structure that impedes regional collaboration.

Golden, Anne, and Sophie Knowles, ed. "Governance Gridlock: Solving the Problem for 21st Century City-Regions." Toronto: Ryerson University, 2013.

This report is for a symposium in Toronto premised on the idea that city-regions are the drivers of economic prosperity in today's global economy. It argues that city-regions need sound governance, sufficient fiscal resources and effective leadership in order to succeed. While focused on Ontario, experts provided think pieces that would have relevance to other regions as well. The summary by Harry Moroz notes that most ideas for city-regions presented fall under three categories: governance reforms or new institutions, increased civic or public engagement and solutions focused on a particular issue. He notes a concern that the creation of municipal power centers might make provincial governments feel threatened.

Gormanns, Nina, and Cam Nguyen. "Canada's Municipal Spending Watch 2015." Canadian Federation of Independent Business, November 2015.

This report argues that the increased spending in Canada's municipal sector has far outpaced the reasonable benchmark of inflation and population growth. Furthermore, the CFIB claims that if Edmonton had held to the benchmark with its spending, each household could have saved $8,500 over the course of the decade. According to the report, Edmonton's operating spending increased by 74 percent between 2003 and 2013 compared to a population increase of 23 percent.

"Greater ABC Region Inter-municipal Consortium." In *Inclusion, collaboration and urban governance: Brazilian and Canadian Experiences*, organized by Hugh Kellas. Vancouver: The University of British Columbia, 2010.

This case study outlines the development of the Greater ABC Consortium, established in 1990, which articulates policies for the Greater ABC Region (part of Metropolitan Sao Paulo). This study argues, among other things, that a key weakness of the consortium's structure was its "lack of mechanisms, such as solid and trustworthy institutions, that ensure continuity of actions agreed upon." In 2009, a new public consortia law was in the works.

Halifax Regional Municipality. "The Greater Halifax Partnership – Economic Development Arm of HRM." May 2010.

The Greater Halifax Partnership was created in 1996 and intended to be the catalyst for economic growth in Greater Halifax. It's a unique model that has been copied elsewhere in North America, including Edmonton, which focuses on bringing together both the private and public sectors. This source is a valuable example of a collaborative model used elsewhere in Canada and can be used as an important example of other Canadian jurisdictions that have found novel ways at coming together to collaborate.

Heigh, Jeremy. "Choose to Lead: Building on the Competitive Advantages of the Capital Region." Sift Every Thing, November 13, 2014.

This report discusses the Alberta Capital Region's competitive advantages, based on interviews with the region's 24 Mayors and with 83 business executives. It finds that the "region's strongest advantages build on the pure volume of its ability to pull in inputs and push out products." It claims that while the energy sector drives the economy, it's not the biggest sector in the region. "Successfully navigating this region," this report argues, "will require deliberate leadership … decision makers must choose to pull in a common direction and focus on opportunities that build this region's advantages."

Hethcock, Bill. "Here's the main reason Toyota is moving from California to Texas." *Dallas Business Journal*, December 11, 2015.

This short article claims that housing costs are the main reason Toyota is re-locating its company to Texas. Its employees want affordable housing and to live the American dream. This source pinpoints an important consideration for regional planners to keep in mind: affordable housing attracts human capital and encourages economic development.

Hyndman, Lou. "An Agenda For Action: Alberta Capital Region Governance Review." Final Report, December 2000.

This report was commissioned by the Government of Alberta to provide recommendations for the Alberta Capital Region on governance and collaboration. It argues that strengthening the region is a necessity and that "partnerships are the best option." Section IV "Moving forward on two tracks" is of particular relevance; Hyndman makes recommendations based on two tracks: 1) a partnership track and 2) a shared services track.

ISL Engineering and Land Services. "Capital Region Integrated Growth Management Plan: Final Report on Core Infrastructure." November 30, 2007.

This report was written to develop the *Capital Region Integrated Growth Management Plan*. It discusses the core infrastructure components of Alberta's Capital Region and the infrastructure that will be required to accommodate projected growth in the region, including highways/roads, railways, airports, transit, water, wastewater, process water, power, pipelines and waste management. Population growth will exacerbate any existing inefficiencies or infrastructure deficits, so it's important to address the region's infrastructure needs.

Kelcey, Brian. "Mergers of RMs Ignorant." *Winnipeg Free Press*, July 10, 2013, http://www.winnipegfreepress.com/opinion/analysis/mergers-of-rms-ignorant-214868671.html.

This short article opposes forced amalgamation of rural municipalities. One of the reasons citied by the author is the tendency for staff salaries to go up and management pay to rise after mergers. Furthermore, larger municipalities can take on debt more easily and do so for precarious infrastructure projects. He claims that the "poster child" for successful amalgamation is Killarney-Turtle Mountain, but notes that this amalgamation was voluntary and followed 40 years of local leaders sharing for selected services.

Kelling, Jan, ed. "Urban-rural relationships in metropolitan areas of influence." Hamburg: Metrex, n.d.

This report discusses different approaches to "urban-rural partnerships" in Germany, recognizing the importance of cooperative relations between metropolitan areas and their surrounding rural areas. Its examples of cooperation are often focused on specific issues, for example, "food" or "tourism." The Rhein-Main regional park is a product of collaboration, and this source records some significant challenges that had to be overcome.

Kushner, Joseph, and David Siegel. "Citizen satisfaction with municipal amalgamations." *Canadian Public Administration* 48, no. 1 (Spring 2005): 73-95.

This article reviews three amalgamations in Ontario (Central-Elgin, Chatham-Kent and Kingston) to see if the goals of "efficient service delivery" and the provision of "high-quality services at the lowest possible cost" were met. This study is valuable as it not only focuses on the level of expenditures after amalgamation but considers changes in the quality and quantity of services delivered. The quality of services is mostly measured by carrying out surveys on citizen satisfaction after amalgamation, and it finds that residents didn't see a significant change in the quality of services.

Kushner, Joseph, and David Siegel. "Effect of Municipal Amalgamations in Ontario on Political Representation and Accessibility." *Canadian Journal of Political Science* 36, no. 5 (Dec. 2003): 1035-1051.

This article examines whether amalgamations in three Ontario municipalities met the objectives of reducing expenditures by taking advantage of economies of scale provided by larger units of government, as well as maintaining accessible representation and preserving community identity while reducing the number of politicians. It concludes that the "immediate aim of reducing the number of councillors was accomplished, but if the underlying objective was to reduce expenditures, the government failed to meet that goal." While most people felt that the accessibility of councillors to their constituents wasn't affected, a "sizeable minority" thought accessibility had diminished.

LeSage, Edward C., Jr., Melville L. McMillan and Neil Hepburn. "Municipal shared service collaboration in the Alberta Capital Region: The case of recreation." *Canadian Public Administration 51*, no. 3 (September 2008): 455-473.

This article is an empirical examination of shared service arrangements (SSAs) for recreational and cultural services among municipalities within the Edmonton metropolitan region, carried out in order to identify factors that promote or discourage municipal participation in inter-municipal agreements. Population is a dominant factor – smaller municipalities with a single facility are more inclined towards SSAs than a large municipality that already has multiple facilities. Results for other potential factors were inconclusive.

Macomber, John D. "The 4 Types of Cities and How to Prepare Them for the Future." *Harvard Business Review*, January 18, 2016.

This article argues that what works for one city will not necessarily work for another. It makes distinctions between legacy vs. new cities and developed vs. emerging economies, discussing what planners should keep in mind depending on which segment their city fits into. While intervention in developed, legacy cities often requires dismantling something that already exists, a newer city needs to build its brand and important infrastructure in order to attract more participants to its economy.

Mallett, Ted, Simon Gaudreault, and Andrea Bourgeois. "Entrepreneurial Communities: Canada's top places to start and grow businesses in 2015." Canadian Federation of Independent Business, October 2015.

This source argues that "entrepreneurship is an inseparable aspect of growth and development of communities." It then ranks cities using different entrepreneurship indicators. The grouping of municipalities surrounding Calgary topped the rankings in Canada, with the Edmonton periphery ranking third overall in 2015 and second overall in 2014. The report states that the outer rings of major cities are "usually better incubators of new businesses because of lower relative costs but still reasonably good access to large markets."

Martin, John, Gary Paget and Brian Walisser. "Rural Municipal Development and Reform in Canada: Policy Learning through Local-Provincial Collaboration." *Commonwealth Journal of Local Governance* no. 10 (December 2011-June 2012).

This article focuses on the role of provincial governments – which are responsible for framing the powers of local governments – with regards to municipal collaboration. It argues that provinces are moving away from "directive intervention" toward a strategy of "facilitative intervention," which seeks "to build capacity in a manner that is less state-centred, more bottom-up, and better adapted to variable local circumstances."

McCulloch, Sandra. "B.C. Transit reports more riders in Greater Victoria, lower costs." *Times Colonist*, July 16, 2014. http://www.timescolonist.com/news/local/b-c-transit-reports-more-riders-in-greater-victoria-lower-costs-1.1208300.

This newspaper article reports that transit ridership has increased in Greater Victoria and that operating costs were below budget, thanks to efforts made by B.C. Transit in partnership with the city to increase efficiency. B.C. Transit is often cited as a successful example of transit collaboration.

Meloche, Jean-Philippe, and François Vaillancourt. "Public Finance in Montréal: In Search of Equity and Efficiency." IMFG Papers on Municipal Finance and Governance. No. 15. 2013.

This paper is about metropolitan governance challenges facing Montreal. After amalgamation in 2001-02, some suburban municipalities de-merged in 2006, and this paper is a discussion about dealing with decentralization. It notes challenges with regional government and discusses the proper way to manage fiscal relations between collaborating jurisdictions, including the concept of equity in public finance. This source is valuable for learning about the experience of another Canadian jurisdiction interested in improving its inter-municipal governance arrangements.

"Metro Vancouver: Collaboration for a Sustainable Metropolitan Region." In *Inclusion, collaboration and urban governance: Brazilian and Canadian Experiences*, organized by Hugh Kellas, 89-98. Canada: University of British Columbia, 2010.

This case study examines Metro Vancouver's collaborative governance model, and its application in regional development planning. Metro Vancouver is a consortium of 22 municipalities, one First Nations government and one unincorporated area. It's focused on integrating land use and transportation strategies, with a goal of environmental protection as a guide. In discussing outcomes, the report claims that Metro Vancouver has helped guide development and provide cost-effective services, but it also lists some of the challenges associated with the model.

Miljan, Lydia, and Zachary Spicer. "Municipal Amalgamation in Ontario." Fraser Institute, May 2015.

This report examines three relatively small municipalities in Ontario to see whether intended benefits of municipal restructuring were realized. Its findings suggest that amalgamation did not result in cost savings or lower property taxes, and the speed with which restructuring was implemented was likely a significant factor in this outcome. The authors also found that "when rural areas were amalgamated with urban areas, residents began to demand more urban services, which further stretched municipal budgets in the years following the initial consolidation."

"Montreal: Amalgamation to Consortiation." In *Inclusion, collaboration and urban governance: Brazilian and Canadian Experiences,* organized by Hugh Kellas. 121-127. Canada: University of British Columbia, 2010.

This case study examines the collaborative governance structures established in Quebec when it amalgamated 28 municipalities surrounding Montreal and then partially dismantled the amalgamation as a result of public concern. As the report argues, "The creation of the Metropolitan Montreal Community as a broader region-wide governance structure … seems to have created tangible societal benefits for the region." On the other hand, "there remains a significant amount of discontent … about the new governance and taxation structures."

Morris, Marleen. "Multi-Sectoral Collaboration and Economic Development: Lessons from England's Regional Development Agencies."

This source argues for the necessity of collaboration in the area of economic development. It studies England's regional development agencies with the intent of applying the lessons learned to the British Columbia context. The author argues that collaborative environments require leaders who are inspiring and lead by example, that "information and evidence" are necessary for good discussion and cooperation, and that monitoring and progress reports "bring coherence to … strategies, programs and projects."

MXD Development Strategists and Stantec. "Alberta Aerotropolis." Prepared for the Leduc Partnership (City of Leduc, Leduc County & EIA). N.d.

This document provides current statistics on, and projections for, the Leduc Region. It lists examples of regional collaboration and partnerships in which the Leduc Region has participated, such as a recreation and library cost share agreement, fire and emergency services cost-share and mutual aid agreements, the Leduc transit service, the Shared Services, Goods and Equipment Agreement, community support services, and airport tax revenue sharing.

Neilson, M., V. Dowdell and J. Kolkman. "Tracking the Trends 2013: 12th Edition." Edmonton, Canada: Edmonton Social Planning Council, 2013.

This publication discusses many aspects of the well-being of Edmonton and the surrounding area, including demographics, education and employment, cost of living and housing trends, wages and income and poverty and government income supports. The authors argue that decision-makers must understand social trends to be effective in the long term, and this source shows trends in the context of other trends. The report emphasizes the population growth Metro Edmonton is experiencing. This source highlights the interdependent nature of the region and the need to collaborate. It's a valuable source of data for regional planners interested in the triple bottom line (economy, environment, social).

O'Brien, Allan. "Municipal Consolidation in Canada and Its Alternatives." Toronto: ICURR Publications, May 1993.

This source provides descriptions and assessments of various cooperation or consolidation models used throughout Canada, noting a need for effective regional planning especially in the face of federal and provincial deficits. In the author's view, though there are often protests during a transition, consolidation or restructuring has lasting benefits. While he notes that there are alternatives to consolidation, he is concerned about a decline in accountability. The author posits that the process by which consolidation occurs can be an important factor in its ultimate success or failure.

Office of the Auditor-General. "Auckland Council: Transition and emerging challenges." New Zealand Parliamentary Paper, December 2012.

This report contains reflections from the Auditor General of New Zealand two years after Auckland's local authorities and Regional Council amalgamated into the single Auckland Council. She points out that this complex entity affects the daily lives of more than a third of New Zealanders, and that its large size presents challenges. She reports that there are inherent tensions in the Council's governance arrangements and is "not confident that the Council will be able to build the more future-oriented and trust-based culture it seeks by using more formal processes and mechanisms." Part 4 of the report explains more about the Auckland Council's two-tier governance structure designed to deal with decision-making: the governing body makes decisions at a strategic and regional level, while local boards have more engagement with the community.

Ontario Ministry of Northern Development and Mines. "Ontario Establishes Ring of Fire Infrastructure Development Corporation." News release. August 28, 2014. https://news.ontario.ca/mndmf/en/2014/08/ontario-establishes-rof-infrastructure-development-corporation.html;

AND

Ontario Ministry of Northern Development and Mines. "Transportation Infrastructure: What is the ROF (Ring of Fire) Infrastructure Development Corporation (ROFIDC)?" http://www.mndm.gov.on.ca/en/ring-fire-secretariat/transportation-infrastructure.

The ROF Infrastructure Development Corporation is a not-for-profit corporation headquartered in Thunder Bay. Created by the Government of Ontario in 2014, its purpose is to "encourage and assist exploration for and development of mineral deposits in the Ring of Fire by financing, building, operating and maintaining strategic transportation infrastructure, including industrial and community access roads." This partnership will include First Nations, industry, communities and the federal government. The interim board of the ROF Infrastructure Development Corporation has four directors from the Ontario Public Service, who will put the structures in place to bring other partners on board.

Organisation for Economic Co-operation and Development. *OECD Territorial Reviews: Competitive Cities in the Global Economy*. OECD Publishing, November 2006.

Summaries here: http://www.oecd.org/gov/regional-poli cyecdterritorialreviewscompetitivecitiesintheglobalecono my.htm

This book studies the growth and competitiveness of regional economies and identifies some of the major dilemmas policymakers face. There are currently 34 countries that are members of the OECD, including Canada, and this report considers 78 of the largest metro-regions found in the OECD's member countries. According to the executive summary, there are a number of economic advantages to large agglomerations, but metro-regions are not always synonymous with success. The report argues that the Greater Vancouver Regional District has achieved striking successes as a voluntary organization in providing some metropolitan-wide services.

Parr, John, Joan Riehm and Christiana McFarland. "Guide to Successful Local Government Collaboration in America's Regions." A Report from National League of Cities' CityFutures Program, October 2006.

This guide informs policymakers of 17 different options for intergovernmental or regional cooperation, along with exploring their associated advantages and disadvantages. It provides its options in the form of a spectrum of "easier" to "harder" options, with "informal cooperation" considered the easiest approach and a "merger/consolidation" option considered the hardest.

Plunkett, Thomas J. "Metropolitan Government in Canada." *University of Toronto Law Journal* 14, no. 1 (1961): 29-51.

This article describes growth patterns in metropolitan areas, stating that the automobile has made it possible to live on the periphery of a large city (which is often seen as a more desirable place to live than in the heart of a city) and to travel back and forth for work. Though the modern metropolitan area is an interdependent economy with area-wide problems, maintaining the same units of local government is typically staunchly defended. But the author concludes that the "development of metropolitan government in [Toronto and Winnipeg] has been a major advance toward meeting the needs of metropolitan areas." While this source is decades old, it's widely considered to be core reading for anyone studying topics related to local government.

Portland Metro Region. "Regional Framework Plan." http://www.oregonmetro.gov/region-al-framework-plan;

AND

Portland Metro Region. "2040 Growth Concept." http://www.oregonmetro.gov/2040-growth-concept.

The Portland Metro's Regional Framework Plan was adopted in 1997 and has been amended several times since. It guides policies with regard to several matters, including mass transit systems and land use planning. The *2040 Growth Concept* is a long-range plan adopted by the Portland Metro Council. Its policies are designed to encourage compact development that uses land and money efficiently, a healthy economy, and more. The plan identifies ten distinct urban design components, such as the "central city," "town centers," "main streets" or "regional centers."

Powers, Pike. "Building the Austin Technology Cluster: The Role of Government & Community Collaboration in *the Human Capital*." Federal Reserve Bank of Kansas City. Proceedings – Rural and Agricultural Conferences. 2004.

Austin, Texas, is a city well recognized as being a center for technology innovation. This source discusses the keys to the city's success, including nurturing a climate for entrepreneurship, having space and facilities for start-ups, property tax abatement and special agreements such as to not annex. In addition to being a great place to do business, the region is recognized for having affordable, diverse neighborhoods.

Radke, C. D. "Working Together: Report of the Capital Region Integrated Growth Management Plan Project Team." December 2007.

Commissioned by the Government of Alberta, this report was written by the project team for the Capital Region Integrated Growth Management Plan. It expresses surprise "at what little real progress has been made" since Hyndman's report in 2000 and recommended the quick establishment of the first Board for the Capital Region. "Compiling information, comparing plans and talking about regional cooperation are one thing," the report argues, "actually implementing a regional approach is another story entirely."

Reputation Institute. "2015 City RepTrak: The World's Most Reputable Cities." 2015.

This report scores cities around the world on their reputation, a measurement of emotional attitudes that stem from rational dimensions. Sydney was labelled the most reputable city in 2015; Vancouver was the highest ranked Canadian city on the list, while Edmonton wasn't measured. This source argues that while the overall reputation of a city is an emotional perception, reputation has a strong impact on the behaviour of stakeholders, who improve a city's economy. This source would be valuable for city planners who want to improve the reputation of their region.

Rosenfeld, Raymond A., and Laura A. Reese. "The Anatomy of an Amalgamation: The Case of Ottawa." *State & Local Government Review* 35, no. 1 (Winter 2003): 57-69.

This article focuses on the experience of the former city of Gloucester during the metropolitan consolidation of the Ottawa-Carleton Region of Ontario, examining "implementation issues associated with consolidation." The piece identifies four problematic aspects of implementation: 1) the transition board was appointed by the province rather than elected at the local level, 2) different administrative cultures were present among the cities (Ottawa preferred to control growth while Gloucester had a "business friendly" stance), 3) the amalgamation was large in scale and 4) the amalgamation was mandated by the province.

Sancton, Andrew. "Municipal amalgamations: a made-in-Canada solution to an undefined problem." *Canadian Issues* (Feb 2003): 33-36.

This source provides valuable historical context on municipal amalgamation, especially from the United States. The author claims, in 2003, that amalgamations are higher on the policy agenda in Canada than elsewhere in the world and that amalgamation doesn't convert into "real influence on the national stage." One of the great unresolved issues with amalgamation, according to the author, is how to fairly represent rural residents. Representation by population would mean rural areas have virtually no representation, while giving them more representation than their population implies compromises a fundamental principle of democratic governance.

Sancton, Andrew, Rebecca James and Rick Ramsay. "Amalgamation vs. Inter-Municipal Cooperation: Financing Local and Infrastructure Services." Toronto: ICURR Press, July 2000.

Focussing on Canadian examples, this study examines four cases of amalgamation and four cases of municipal cooperation. Chapter 3 contains interesting historical information on the Edmonton Metropolitan Region. In the authors' view, Edmonton is already remarkably consolidated by North American standards. This source is hesitant about further municipal consolidation being undertaken in the region, because "such a course of action has rarely lived up to expectations." It points out that "amalgamation and inter-municipal agreements co-exist in the real world; they are not mutually exclusive alternatives."

Slack, Enid. "Innovative Governance Approaches in Metropolitan Areas of Developing Countries." UN Habitat Global Expert Group Meeting, June 2014.

This paper is about identifying a range of governance mechanisms that can support efficient and equitable services in the metropolitan areas of developing countries. Rapid urbanization throughout the world has created economic opportunities as well as serious challenges. It points out that special-purpose bodies have the disadvantage of not being required to make trade-offs when it's responsible for only a single service. This paper also emphasizes that different contexts must be taken into consideration when choosing or reviewing governance models.

Slack, Enid. "Inter-Municipal Cooperation: Sharing of Expenditures and Revenues." Toronto: ICURR Publications, April 1997.

This report reviews Canadian and American examples of inter-municipal cooperation including expenditure sharing and tax sharing. The author concludes that "inter-municipal cooperation is probably more successful at meeting the criteria of efficiency and effectiveness than is amalgamation. Annexation and amalgamation, do, however, result in a fairer distribution of the tax burden among constituent municipalities." She also suggests that "in terms of accountability, annexation and amalgamation are likely to be more accountable because those making the expenditure and tax decisions are elected by local taxpayers" as opposed to cases in which tax decisions and expenditure decisions are made by separate parties.

Slack, Enid, and André Côté. "Comparative urban governance." UK Government's Foresight Future of Cities Project, July 2014.

This paper describes and compares different models of urban governance around the world, including the one-tier fragmented government model or voluntary cooperation and special districts model. It claims that, internationally, "no one model of governance stands above the rest" but that "some form of region-wide authority is essential for cities." According to the source, Canada's model of local government involves "weak mayoral leadership" that "can result in an incoherent governing agenda."

Slack, Enid, and Richard Bird. "Does Municipal Amalgamation Strengthen the Financial Viability of Local Government? A Canadian Example." *Public Finance and Management* **13, no. 2 (2013): 99-123.**

This article argues that while amalgamation of Toronto resulted in increased expenditures for fire, garbage, parks and recreation (but not for libraries) and reduced access and participation by residents in local decision-making, it did increase the financial abilities of smaller municipalities by increasing their access to the tax base of the amalgamated city and equalized local services in the sense that residents throughout the whole city received a similar level of services. Part of the reason amalgamation doesn't save costs is because "salaries and benefits tend to equalize up to the level of the former municipality with the highest expenditures." Tackling the issue of amalgamation in Toronto, the authors argue that the process has resulted in a city still too small to address regional issues, but too big to be responsive to local residents.

Slack, Enid, and Richard Bird. "Merging Municipalities: Is Bigger Better?" Institute on Municipal Finance & Governance Papers on Municipal Finance and Governance, No. 14. 2013.

This paper reviews ways in which the governance of metropolitan areas may be restructured, including a case study of the amalgamation in Toronto. The concluding section "Is Bigger Better?" sums up the authors' views: it's possible that merging municipalities would enable some smaller municipalities to reap some economies of scale, but it's unlikely. Inter-municipal cooperation allows local governments to retain autonomy while still permitting them to be more responsive to residents' needs, but it can also be hard to implement a regional vision. The authors suggest that the "two-tier approach" may be the best.

Southeastern Wisconsin Regional Planning Commission. http://www.sewrpc.org/SEWRPC.htm.

The Southeastern Wisconsin Regional Planning Commission (SEWRPC) was created in 1960 and is the metropolitan planning organization for seven counties. Its purpose is to provide the "planning services necessary to solve problems which transcend the corporate boundaries and fiscal capabilities of the local units of government." This Commission is an international example of a collaborative inter-municipal initiative.

Spicer, Zachary. "Cooperation and Capacity: Inter-Municipal Agreement in Canada." IMFG papers on Municipal Finance and Governance no. 19 (2015).

This paper examines inter-local agreements in six Canadian metropolitan areas, including Edmonton. In the author's view, provincial governments have not actively encouraged municipalities to pursue voluntary inter-local cooperation, but there is evidence this attitude is changing as "enthusiasm for amalgamation appears to be waning." The Edmonton CMA is the largest area geographically of the cities included in the study, and it has a higher number of governing units than Calgary. The author finds that the bulk of inter-municipal agreements are in the Toronto and Edmonton CMAs.

Spicer, Zachary. "Post-Amalgamation Politics: How Does Consolidation Impact Community Decision-Making?" *Canadian Journal of Urban Research* **21, no. 3 (2012): 90-111.**

This paper uses Hamilton as a case study in post-amalgamation governance. It analyzes votes for the first three city councils following amalgamation and finds that councillors from amalgamated communities primarily vote together, with little cohesion with councillors from the central city. In other words, "two distinct voting blocs" emerged, though these blocs appear to be losing strength over time. This source examines the effects amalgamation has on communities that come together. Amalgamation doesn't necessarily solve regional problems, as voting trends on new councils can "be detrimental to future urban initiatives, such as transportation planning in the city or urban renewal projects."

St. Albert Transit System and Edmonton Transit System. "Moving Integrated Transit Forward." StAT/ETS Regional Transit Concept Attachment 1, April 2015.

Struggling to keep up with increasing demand for public transit, St. Albert City Council passed a motion to enter into talks with Edmonton about transit integration. The report outlines the case for collaboration between Edmonton Transit Services and St. Albert Transit, the experience of other jurisdictions and the potential outcomes of greater integration (e.g. more convenient service across municipal boundaries, superior access to a wider range of jobs to a wider range of people and greater linkage between regional transportation and regional land use planning).

Stantec. "Musquodoboit Harbour Cooperative Transportation Study." March 31, 2011.

This study explores the potential provision of transit services in the Musquodoboit Harbour area of Nova Scotia through a cooperative organization. Section 3.0 "Framework for Rural Cooperative Transit" discusses basic components of a rural transit cooperative, some of which would be applicable to any transit service, ranging from the requirement to incorporate the cooperative to vehicle selection to available funding sources.

Stokes Economic Consulting and Strategic Projections. "Capital Region Population and Employment Projections." September 12, 2013.

Commissioned by the Capital Region Board in 2012, this report contains population and employment projections for the region up to year 2047. Its base case sees the region's population growing at a rate averaging 24,400 per year.

"Toronto as a Global City: Scorecard on Prosperity – 2015." Toronto Region Board of Trade, 2015.

With a focus on trade, this document measures and assesses the economy and labour attractiveness of the Toronto Census Metropolitan Area compared to 23 other metropolitan areas around the globe. Toronto is Canada's largest urban region and planners elsewhere in Canada that want to see their regional economies be globally competitive might learn from its experiences.

United Way. "Creating Pathways Out of Poverty." 2013.

This report discusses the state of Alberta's Capital Region in terms of poverty and other social issues. In a section on regional alignment and collaboration, the report argues that "addressing poverty is not something that one organization or order of government can take on alone – it takes a truly collaborative effort; with government, the not-for-profit sector, corporate partners and community members aligned together."

Urban Development Institute. "Market Watch September 2015." 2015.

This brief report provides statistics on employment, weekly earnings, migration, housing sales and more for the Edmonton Census Metropolitan Area.

Urban Systems. "Inter-municipal Transit Governance Study and Implementation Plan." Interim Report to the Transit Committee, November 27, 2012.

This report for the CRB's Transit Committee argues that the Inter-municipal Transit Network Plan outlined in the Capital Region Board's *Growth Plan* "is vital in terms of enhancing the prospects for economic, social and environmental success" in the region. The report recognizes "that the limitations and constraints to implementing the strategy are intrinsically connected to the governance model that exists today."

Vojnovic, Igor. Municipal Consolidation in the 1990s: *An Analysis of Five Canadian Municipalities.* **Toronto: ICURR Publications, August 1997.**

This study, which details the first phase of a consolidation research project, includes discussions on economies of scale, equity considerations, political accountability, citizen access, regional planning and economic development. The author notes that "a generic answer to whether municipal consolidation is the most effective reform option cannot be expected" given municipalities' unique contexts.

Vojnovic, Igor. "The Transitional Impacts of Municipal Consolidations." *Journal of Urban Affairs* **22, no. 4 (2000): 385-417.**

This article examines the transition and short-term effects of municipal consolidation on five amalgamated municipalities in Canada, finding that the success of consolidation is dependent on distinct history as well as the spatial and economic circumstances of the region considering reform.

Webster, Douglas, and Larissa Muller. "Urban Competitiveness Assessment in Developing Country Urban Regions: The Road Forward." Paper prepared for Urban Group, INFUD, July 17, 2000.

This paper is about the different approaches and techniques used for assessing the competitiveness of urban regions, particularly in developing countries. Urban competitiveness "refers to the ability of an urban region to produce and market a set of products (goods and services) that represent good value (not necessarily lowest price) in relation to comparable products of other urban regions." The more competitive an urban region, the better the quality of life and standard of living for its people. One indicator of competitiveness the authors mention is the degree of inter-jurisdictional cooperation, arguing "intra-urban region competition is not only costly for urban residents, but a detriment to the urban area's overall competitiveness."

Wheeler, Stephen M. "The New Regionalism: Key Characteristics of an Emerging Movement." *APA Journal* **68, no. 3 (2002).**

This article details developments within the academic field of urban studies or urban planning. It states that since the early 1990s there has been a dramatic resurgence of interest in regional planning. The "New Urbanism," it argues, is about smart growth, liveable communities, sustainable development and improved equity within metropolitan areas. The article encourages urban planners to coordinate and think holistically. "Regional agencies," as the author argues, "must integrate land use, air quality, and transportation planning, through coordinated action between agencies if not a single regional plan by one agency." It also notes "urbanists in particular" have "recognized that many regional problems can only be solved by coordinating planning and urban design at regional, municipal, neighbourhood and site scales."

Work Foundation. *Collaboration Case Studies.* **N.d.**

This document contains brief case studies of inter-municipal cooperation initiatives in the United Kingdom. The studies mention challenges that were faced, outcomes and lessons that planners elsewhere can learn from. For example, in the Glasgow Edinburgh Collaboration case study, it states that challenges can arise "if there are concerns about the benefits of collaboration being greater for one party than another." The Association of Greater Manchester Authorities (AGMA) is considered a success that has inspired other public and private sector bodies to collaborate on a wide range of issues.

Working Group of Government Departments, Core Cities, and Regional Development Agencies. "Cities, Regions and Competitiveness." Second Report. UK: Office of the Deputy Prime Minister, June 2003.

This report is about strengthening the United Kingdom's capacity for growth through stronger regional cities. It argues that the following are significant factors in success: 1) strength of "innovation" in all areas of the economy, 2) level and relevance of workforce skills, 3) efficiency of transport connections to key markets and 4) capacity to design and deliver long-term development strategies. This source discusses the "city-region" relationship –(i.e. how cities boost regions and how cities in turn rely on the region), and is a valuable indicator that throughout the world, governments are interested in the potential of city regions.

York Region Transit. "About Us." http://www.yrt.ca/en/aboutus/history.asp.

In 2001, five municipal transit systems amalgamated to form the York Region Transit (YRT). Since then it has experienced an average growth of 10 percent per year, making the average weekday ridership approximately 80,000 passenger trips. Launched in 2005, Viva is a bus rapid transit service. YRT/Viva contracts out its services to private contractors to employ bus operators and maintain the fleet, rather than the transit agency being responsible for its operators and fleet, making it a unique service delivery model in Canada.

Appendix 5 – Research Review
– Models of Collaboration

A. "Shared Investment/Shared Benefit" Models

In recent decades, a confluence of factors has come together to put pressure on municipal finances. As a result, municipalities have had to look at ways to increase efficiency and cut costs, including partnering with the private sector, amalgamating with neighbouring municipalities or cooperating with other municipalities in the delivery of services. Adopting a "shared investment, shared benefit" approach is one form of inter-municipal cooperation that has been successfully implemented in jurisdictions in Canada and the United States. "Shared investment, shared benefit" models can take a number of forms, including the following:

MINNEAPOLIS-ST. PAUL

The Minnesota Fiscal Disparities Program is a system that provides for the partial sharing of the commercial-industrial property tax base among all jurisdictions within a metropolitan area. Used in the Twin Cities, the model requires each municipality to contribute 40 percent of its annual growth in commercial-industrial tax revenues to a regional pool. Studies have demonstrated that the program has reduced tax disparities between high and low-income areas, allowing for reinvestment in the central cities and in fiscally challenged neighbouring communities. Furthermore, it has also promoted more integrated regional economic development by reducing the incentive for municipalities to capture revenue-generating land uses from neighbours.

TOWN OF WHITECOURT AND WOODLANDS COUNTY

As so many of their residents work in one and live in the other, the Town of Whitecourt and Woodlands County, in 2010, signed a tax revenue sharing agreement, stating their desire to "develop and maintain safe and viable communities" that are "efficient and economical." Under the agreement, the town and county pay to each other 30 percent of the municipal taxes they collect on new non-residential developments with a construction value of $50 million or greater.

REGIONAL DISTRICTS IN BRITISH COLUMBIA

In 1965, the Government of British Columbia introduced a new form of local government known as the regional district system. The purpose of the new system was to provide a means for the municipalities and rural areas to work together at a regional level. There are 29 regional districts in the province. Under the model, regional districts, whose governing boards are made up of municipal councilors, can take on any function that their municipalities can perform on their own. Regional districts have three basic roles: 1) provide region-wide services (e.g. regional parks and 911 service, 2) provide inter-municipal or sub-regional services where residents of a municipality and residents in areas outside the municipality benefit from the service (e.g. recreation facilities) and 3) act as the general local government for the electoral areas and provide local services such fire protection and waterworks.

The revenue used to finance regional district operations and services is generated through property taxes, fees and other charges. Each year, the regional district board sets its budget, through a Five-Year Financial Plan, which determines the amount of revenue that will be needed. The amount to be collected through taxation is then apportioned among the regional district participants, which includes member municipalities, electoral areas and service areas.

REGIONAL COUNTY MUNICIPALITIES IN QUEBEC

Quebec has 87 county-like political entities known as municipalités régionales de comté, or regional county municipalities. Municipalities in the province are charged for services by the regional county municipality in which they are located. Municipalities pay for these services through their contribution to their regional county municipality. For most services, these contributions are not based on a municipality's usage of regional services, but on its capacity to generate revenues, which is measured by the standardized property value (i.e. the potential to generate revenues from their tax base). This model acts like a form of fiscal balancing within the region as the municipalities with higher standardized property values pay a greater share of the costs than what they are in fact "consuming." Local municipalities have the choice of opting out of certain services if they wish to do so.

METROLINX'S TRANSIT PROCUREMENT INITIATIVE (ONTARIO)

Metrolinx's Transit Procurement Initiative (TPI) is one of the largest joint transit procurement programs in North America. Since its creation in 2006, the program has helped its 33 registered member transit agencies – small, medium and large transit systems from across the province – save money by leveraging their collective purchasing power. In addition to actual buses, TPI's purchases also include service and repair. The program is estimated to have saved Ontario taxpayers roughly $14.39 million to date in purchasing and administrative costs.

B. Examples of Inter-Municipal Cooperation in Other Jurisdictions

Economic Development

THE GREATER TORONTO MARKETING ALLIANCE (GTMA)

The GTMA is a public-private partnership that brings together the 29 municipalities and regions in the Greater Toronto Area (GTA), the provincial and federal governments, several not-for-profit organizations and a cross section of private sector corporations. Working to "expand the economy of the GTA by raising the profile of the region internationally to attract new investment and employment," the GTMA is a key point of contact for businesses wanting to explore opportunities in the region. Its current Board of Directors includes four regional Mayors, regional economic development directors and the CFO for Metrolinx, the provincial agency responsible for coordinating and integrating transportation in the Greater Toronto and Hamilton Area. The Alliance has played a role in attracting a number of businesses to the region, including India-based Polaris Software Lab Ltd., interactive entertainment giant Ubisoft and Arkadiu, the New York-based developer, publisher and distributor of casual, social and mobile electronic games.

METRO DENVER ECONOMIC DEVELOPMENT CORPORATION

The Metro Denver Economic Development Corporation's mission is "to enhance the regional economy through the retention and expansion of primary jobs and capital investment." As an affiliate of the Denver Metro Chamber of Commerce founded in 2003, it brings together cities and economic development agencies from nine counties in the Metro Denver and Northern Colorado area. Rather than compete with each other, the cities and counties work together to compete against other major cities around the globe. In Forbes' 2015 list of the Best Places for Business and Careers, Denver ranked No. 1 and Fort Collins ranked No. 10.

Transit

YORK REGION TRANSIT

In 2001, the regional municipality created York Region Transit (YRT) by bringing together five separate municipal transit systems operating in the region. Four years later, YRT launched Viva, its bus rapid transit service. The regional transit system now services all nine York Region municipalities, with more than 120 routes as well as connecting services in the City of Toronto and the Region of Peel. The York Region Rapid Transit Corporation is a subsidiary of the Regional Municipality of York. Its Board of Directors comprises the Chairman and CEO and the mayors or councillors of the region's towns and cities. Since the establishment of YRT, ridership on the conventional transit system has grown by an average of 10 percent per year, resulting in an average of 80,000 passenger trips per weekday.

VICTORIA REGIONAL TRANSIT COMMISSION

The Crown Corporation B.C. Transit has been responsible for transit services in the province for several decades. In the 1990s, regional transit commissions were created through the British Columbia Transit Act to make decisions regarding transit services and funding in Victoria and Vancouver. The Victoria Regional Transit Commission is made up of seven elected local government officials appointed by the Lieutenant Governor in Council. Two commission members are appointed as directors of B.C. Transit. It's funded by the province, local government, fuel taxes and passenger fares. Compared to similar sized systems across Canada, Victoria Regional Transit has 35.1 percent more passengers per capita and a 13.3 percent lower operating cost per passenger.

GRAND RIVER TRANSIT (WATERLOO REGION)

Grand River Transit (GRT) was created in 2000 through the merger of the former Cambridge and Kitchener transit systems. GRT is run by the Regional Municipality of Waterloo and now provides services throughout the three cities of Cambridge, Kitchener and Waterloo. Annual ridership increased by 110 percent between the end of 1999 — when the GRT was established — and 2011, a year that saw a ridership of 19.7 million. By the end of 2014, its ridership reached more than 21.6 million.

BOW VALLEY REGIONAL TRANSIT SERVICES COMMISSION

The Bow Valley Regional Transit Services Commission is a government agency that was established in 2011, and it assumed responsibility for Roam, Banff's local transit service. Its mission is to create and enhance a regional transit system in the Bow Valley. It currently serves Banff, Canmore and Improvement District #9. Its Board of Directors comprises six elected officials from the region. Transit ridership has been greatly increasing with the introduction and expansion of regional services. In 2015, Roam's regional service saw a 10 percent usage increase from 2014.

Land-use planning

YUKON LAND USE PLANNING COUNCIL

Following the failure of the Yukon Land Use Planning Agreement, the Yukon Territorial Government, the federal government and the Council for Yukon First Nations, by signing the Umbrella Final Agreement, established the Yukon Land Use Planning Council (YLUPC) in 1993. The agreement acknowledged Aboriginal rights and interests and allowed for individual First Nation land claim agreement negotiations. The YLUPC consists of three members, with one member nominated by each of the three parties that signed the agreement, and each member serve a three-year term. Under the oversight of the YLUPC, the North Yukon Regional Land Use Plan was the first regional plan approved in the Yukon.

SOUTHEASTERN WISCONSIN REGIONAL PLANNING COMMISSION

The Southeastern Wisconsin Regional Planning Commission oversees land use and transportation planning in seven counties in the southeastern part of the state. Created in 1960 through legislation, it helps plan for public works such as highways, transit, sewerage, water supply and parks. The commission consists of 21 members, three members from each of the seven counties. The county appoints one member and the Governor appoints another two members. It's funded by a regional tax levy apportioned to each of the seven counties and receives supplements from the state and federal government.

Other examples of collaboration

GREATER MANCHESTER COMBINED AUTHORITY (UNITED KINGDOM)

The Greater Manchester Combined Authority was formally established in 2011 to provide a formal administrative authority for Greater Manchester, replacing a range of single-purpose joint boards. It has strategic authority over public transport and skills and planning, among other areas. It consists of eleven indirectly elected members. Effective in 2017, the region's voters will fully elect a Mayor to govern alongside ten council members.

PARTNERSHIP FOR URBAN SOUTH HAMPSHIRE (UNITED KINGDOM)

The Partnership for Urban South Hampshire recognizes the benefits of working together to support sustainable growth in the region, and it facilitates the strategic planning necessary to support growth. Along with Solent EU Collaboration Group, members have worked collaboratively to develop 18 European Union-funded projects with a total value of over £20 million.

PIMA ASSOCIATION OF GOVERNMENTS

The Pima Association of Governments' mission is "to address regional issues through cooperative efforts and pooled resources, and to provide accurate, relevant data that leads to effective regional planning decisions." PAG was established in 1970 as a council of governments. In1973, it was designated to address transportation planning at a regional level.

ALAMO AREA COUNCIL OF GOVERNMENTS (TEXAS)

The Alamo Area Council of Governments (AACOG) was established in 1967 as a voluntary association of local governments and organizations that provides general assistance to member governments in their planning functions and the administration of a wide range of services, including regional transit, veterans services and 911call centres.

C. Municipal Entity Option

	REGIONAL SERVICES COMMISSION	SOCIETY	PART 9 COMPANY	BOARD, COMMITTEE, AUTHORITY FORMED BY AGREEMENT BETWEEN PARTICIPATING MUNICIPALITIES	FOR PROFIT CORPORATION	PUBLIC/ PRIVATE PARTNERSHIPS
OBJECTS OR SERVICES PROVIDED	• Services authorized in the Regulation establishing the Commission (e.g. solid waste, water, sanitary sewage, assessment services, emergency services, etc.)	• Any benevolent, philanthropic, charitable, provident, scientific, artistic, literary, social, educational, agricultural, sporting, or other purpose that does not involve trade or business	• a) Can include art, science, religion, charity or any other useful object and it is the intention of the company to apply profits or any other income in promoting its objects • Payment of dividends to members of the Company is prohibited • b) Formed solely for the purpose of promoting recreation amongst its members and it is the intention of the Company to apply profits or any other income in promoting its objects • Payment of dividends to members of the Company is prohibited	• Any municipal purpose or service which a Municipal Authority is authorized to provide	• Established to make profit for its shareholders • Any other purposes or limitations on purposes or services may be specified in constituting documents (generally Articles, Bylaws and, if applicable, the Unanimous Shareholders Agreement (USA) • Municipally controlled Corporations must be incorporated for Municipal purposes as set out in s. 3 of the *Municipal Government Act* (Reg. 284/03)	• Public/Private partnerships take many different forms • Usually the Private entity seeks profit, while the Public entity seeks the construction of a capital project with the use of private funds
APPOINTMENT OF DIRECTORS	• Initial Directors and Chairman appointed by Minister • Subsequent Directors and Chairman appointed by Bylaw approved by Minister • A Director who represents a Municipality must be a member of Council	• Provided for in the bylaws of the Society • Usually elected by the members of the Society	• Directors appointed in accordance with the Articles of Association or by Agreement	• Directors are appointed according to the Agreement establishing the Authority, Board or Committee	• Directors are appointed according to the constituting documents • Generally parties "vote their shares" (i.e. if one party controls a majority of shares, that party can control who is appointed as Director, subject to any provisions to contrary in the USA)	• As P3s are not a legal entity, Directors are not appointed • Rather, the parties are separate legal entities with a common purpose, which is governed by the agreement(s) between the parties

POWERS	• Is a separate legal entity that has the powers set out in the Act and the Regulations establishing the Commission • Has natural person powers, can own land and has the power to expropriate • Must hold meetings in public • Service area is limited to geographic boundaries of members • Not designed to make profit	• Is a separate legal entity that has the powers set out in the Act • Can hold land and borrow funds as set out in the Bylaws of the Society • Not designed to make profit	• Is a separate legal entity and has the powers set out in the Act • Can hold lands in its own name and borrow funds • Not designed to make profit	• Not a separate legal entity and therefore cannot hold land or borrow funds in its own name. • Not designed to make profit	• A separate legal entity with the powers contained in the BCA including "natural person" power • Subject to restrictions in BCA and USA • Does not have the statutory or legislative powers of a municipality but can make profit	• Each party retains its separate powers but enters into agreements in order to achieve common goals
BORROWING	• Can borrow with the approval of the Directors of the Commission, subject to the restrictions set out in the Act and the Debt Limit Regulation	• For the purpose of carrying out its objects, a Society can borrow, raise or secure the payment of money in any manner the Society thinks fit, subject to the requirements set out in the Society's bylaws	• Can borrow for the purpose of carrying out its objects but is not eligible for direct loans from Alberta Capital Finance Authority (ACFA)	• As it cannot borrow, it must obtain money from the members of the Authority	• Enjoys full borrowing powers unless restricted by constituting documents, or "liquidity and solvency" test contained in BCA • Is not eligible for direct loans from ACFA	• Typically the private entity will borrow funds to fund project, and recoup those funds over the life of the project, often through an operating or maintenance agreement • The financial institution providing the funds will typically require security over agreements
CONTROL	• Directors manage and control the Commission, subject to the restrictions in the Act and Bylaws • Directors are appointed by the Municipal Authorities • Possible to provide for unequal representation on the Board	• Directors usually control Society, subject to the provisions contained in the Bylaws and the Act • Membership is generally open and members elect the Directors	• Members elect and appoint Directors who usually control the Company subject to the provisions contained in the Bylaws and the Act	• Can be controlled in the manner set out in the Agreement under which the Authority, Board or Committee is established	• Shareholdings are usually proportionate to contribution • Shareholders control the election of Directors, who control the hiring of management • Directors and management have effective day-to-day control of the corporation	• Each entity is subject to its own control mechanism • The relationship is governed by legal obligation in agreements

AUTHORIZING LEGISLATION	• *Municipal Government Act*, R.S.A. 2000, c. M-26	• *Societies Act*, R.S.A 2000, c. S-14	• *Companies Act*, R.S.A 2000, C. C-21	• *Municipal Government Act*, R.S.A. 2000, c. M-26	• *(Alberta) Business Corporations Act*, R.S.A. 2000, c. B-9	• Each entity subject to own governing legislation
HOW ESTABLISHED	• Regulation made by the Lieutenant Governor in Council (Cabinet) on the recommendation of the Minister of Municipal Affairs	• Application for Incorporation, proposed bylaws with proposed name filed with the Registrar under the Business Corporations Act (BCA)	• Filing of Memorandum and Articles of Association along with proposed name with Registrar under BCA	• By Agreement between participating Municipal Authorities setting out powers, duties and functions of the Authority, Board or Committee	• By filing Articles of Incorporation and other constituting documents with Registrar under BCA • Municipalities require Ministerial approval (M.O.) to acquire shares (MGA: ss. 73, 250)	• By agreements between the parties