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REQUEST FOR DECISION

RFD010-2023 Low Income Property Tax Exemption Policy



To: Town Council
From: Director of Finance
Date: ~~April 25, 2023~~ May 9, 2023
Subject: Low Income Property Tax Exemption Policy

References/Attachments

2023/24 Operating Budget

Legislation

Section 69 of the MGA

Recommendation

(Staff recommendation to council)

Background

The Low Income Property Tax Exemption Policy allows low-income property owners to apply for an annual maximum tax exemption on their primary residence within Berwick. This policy, initially adopted in April of 2015, was last reviewed in February of 2016 and staff identified it for review.

In conducting the policy review, staff researched several current low income property tax exemption policies in six municipalities across Nova Scotia, selecting both comparable size and local communities. Below is the data we compared:

Town	Household Income Max	Max Rebate	Average Rebate
Berwick	\$27,000	\$410	\$330
Antigonish	\$25,000	\$400	\$400
Kentville	\$27,619	\$544	\$389
Lunenburg	\$40,000	\$1,000	\$583
Mahone Bay	\$32,000	\$600	\$600
Middleton	\$23,400	\$275	\$275
Municipality of Kings	\$36,000	\$316	\$316
Wolfville	\$31,500	\$780	\$780

REQUEST FOR DECISION
RFD010-2023 Low Income Property
Tax Exemption Policy



Berwick currently follows a tiered structure:

Minimum Total Household Income	Maximum Total Household Income	Rebate
\$0	\$18,500	\$410
\$18,501	\$20,500	\$380
\$20,501	\$22,500	\$340
\$22,501	\$24,500	\$290
\$24,501	\$27,000	\$230

Of the compared municipalities, Kentville and Lunenburg offer exemptions based on a tiered scale, while the other municipalities offer exemptions based on a maximum income and one set amount. As many municipalities are moving toward the later example, our recommendation will be to follow suit, eliminating the tiered system. This results in a simple formula for residents to recognize on their application and improves efficiency for administration of the program.

The historical low-income property tax exemptions awarded in Berwick are presented below:

Year	# of Exemptions	Total Exemption	\$410	\$380	\$340	\$290	\$230
2022/23	21	\$6,227	4	0	5	4	8
2021/22	22	\$6,510	4	1	2	6	9
2020/21	16	\$5,130	4	1	2	6	3
2019/20	22	\$7,550	5	5	6	3	3

Staff are proposing ~~holding-adjusting~~ the maximum total household income ~~at to~~ \$27,000 ~~648~~ and moving to a single exemption rebate for qualifying property owners of \$350. While this adjustment may result in a slight decrease in the rebate amount for four property owners, based on last year’s applications, it will be a financial benefit to the remaining applicants.

Staff have revised the due date of applications from August 31st of the year to ~~August 15th~~ July 31st of the year. This allows ample time for staff to process the exemption applications prior to the final tax billing which occurs prior to September 15th.

Financial Implications

The 2023/24 Operating Budget included \$6,300 based on last year’s low-income tax exemptions awarded. The proposed change may result in the awarded exemptions ~~totaling \$7,700~~ being over budget, ~~which would be \$1,500 over budget~~. Staff are confident savings

REQUEST FOR DECISION
RFD010-2023 Low Income Property
Tax Exemption Policy



will be identified to cover this potential overage.

Priority Alignment

Check Applicable	Strategic Priority Area	Comments
X	Economic	
	Environmental	
X	Social	
	Cultural	

Alternatives

Council may provide alternate direction to staff.

Community Engagement/Communication

Notification of the Low Income Tax Exemption Policy will be placed on the Town's website, social media and included in our upcoming newsletter.

CAO Comments

I support the recommendation of staff.

CAO Initials: JB

Target Decision Date: May 9, 2023



Low Income Tax Exemption Form

Applicant Name: Ben Karson
Applicant Phone Number: 9022668995
Assessment Number: 452154
Street address: Foster 25
City: Berwick
Postal code: B0P1E0
Applicant Email Address: liberty1705@gmail.com

Please complete the income information using the fields below:

Actual Income from Employment: 3000

Enter the name and value of any Pensions below

Pensions:

Pension Name	Pension Value
Manulife	2500

Enter the name and value of any additional sources of income below

Additional Income:

Income Name	Income Value
Investments	2500

Total Income (All Sources): 8000

Please include a copy of your Notice of Assessment from Canada Revenue Agency showing line 150 total Income (for each person).

File Upload

Low Income Property Tax Exe...pdf

Terms and Conditions Accepted

Low Income Property Tax Exemption Policy

Department: **Finance**
Adopted: **April 14, 2015**

Policy No: **5.021**

1.0 Purpose

To provide a low income tax exemption for tax payers in accordance with Section 69 of the Nova Scotia Municipal Government Act.

2.0 Scope

This policy is applicable to tax payers within the Town of Berwick who meet the requirements as set out in section

3.0 References

- 3.1 Nova Scotia Municipal Government Act
- 3.2 War Veterans Allowance Act (Canada)

4.0 Definitions

- 4.1 **"Income"** is defined as a person's total income from all sources except allowances paid pursuant to the War Veteran's Allowance Act (Canada) or a pension paid pursuant to the Pension Act (Canada) for the calendar year preceding the fiscal year of the Town and includes the income of all other members of the same family residing in the same household.
- 4.2 **"Town"** is the Town of Berwick.
- 4.3 **"OAS"** is the Old Age Security (Canada)
- 4.4 **"GIS"** is the Guaranteed Income Supplement (Canada)

5.0 Policy

- 5.1 An exemption of \$350.00 will be granted to a tax payer to be applied toward their final property tax bill, provided the following conditions are met:
 - Income as defined in this policy does not exceed \$27,648 in the fiscal year 2023-24.
 - The tax payer provides the completed application and required Income Tax Notice of Assessment.
 - The tax payer owns and occupies the Town property as their principal residence.
- 5.2 Where the property is jointly owned, only one tax exemption will be applicable per property regardless of ownership.

5.3 The low-income property tax exemption amount may only be applied toward property taxes owing and will not be applied toward sewer charges.

5.4 In the event property taxes owing are less than the low-income property tax exemption amount, the exemption applied will not exceed the property taxes owing. At no time shall this exemption result in a credit balance on the tax payer's account.

5.5 This program will be advertised annually in May in any given year to advise residents that applications must be submitted no later than July 31st.

5.6 The income threshold will be adjusted annually to reflect the maximum income provided to a retired couple by OAS and GIS.

6. Review

6.1 This policy will be reviewed every two years.

CAO

Date

Revision Dates:	February 9, 2016 May 9, 2023
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Low Income Property Tax Exemption Policy

Department: **Finance**
Adopted: **April 14, 2015**

Policy No: **5.021**

1. Background

The Council of the Town is authorized to adopt a policy providing tax exemption to residents of the Town of Berwick in accordance with Section 69 of the Municipal Government Act. This policy is designed to document the processes followed by the Town residents to make application to receive the low-income property tax exemption if they meet the required qualifications.

2. Policy Objective

This policy is designed to clearly outline the process and requirements to be followed to ensure provision of the low-income tax exemption to qualified residents of the Town of Berwick.

3. Guidelines

1. The Town of Berwick determines its tax rates each year following confirmation of the budget for the period. These tax rates are used in conjunction with the property assessment values provided by Property Valuation Services Corporation (PVSC) to determine the property taxes that are applicable to each property within the boundaries of the Town of Berwick.
2. In an effort to offer some relief to residents of the Town that may be experiencing difficulty paying their property taxes, the low-income property tax exemption is being implemented.
3. The program will be advertised annually providing details of qualifications and the report, policy and application will be available on the website.
4. The low-income property tax exemption will provide qualified applicants with a reduction in the total property tax amount based on income levels shown in the table below:

Income	Tax Exemption
less than \$18,500	\$410
\$18,501 – \$20,500	\$380
\$20,501 - \$22,500	\$340
\$22,501 - \$24,500	\$290
\$24,501 - \$27,000	\$230

4. Qualifications

1. In order to qualify for the exemption, the total income (as shown on Line 150 of the Canada Revenue Agency Assessment Notice for the preceding calendar year) of all persons residing in the household of the applicant ratepayer, must be less than the amounts shown on the table in Section 3.4.

2. Amounts or allowances paid pursuant to the War Veteran's Allowance or War Pension shall be excluded from this total.
3. The applicant ratepayer must occupy the residential property as his or her principal residence.
4. The applicant ratepayer completes the application completely and provides the required Income Tax Notice of Assessment.
5. Only one tax exemption will be applicable per property regardless of ownership.

5. Process

1. The applicant ratepayer should complete the application, sign the application, attach the required Income Tax Notice(s) of Assessment and deliver to the Town office prior to October 31st of the year.
2. The Finance Department will review the application for completeness, accuracy and eligibility and advise the applicant ratepayer of the decision.
3. The Finance Department will apply an amount based on the table in Section 3.4. to the property tax account for all eligible applicants.

6. Review and Update

1. This policy will be reviewed periodically to determine the Town was able to meet the need of the qualified applicants, if the Town will be able to offer a larger exemption, a higher income level or another modification to the policy.

Revision Dates:	February 9, 2016
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**REQUEST FOR DECISION
RFD012-2023: Determining
Optimized Management Strategies
for NS MEUs**



To: Town Council
From: CAO
Date: May 9, 2023
Subject: Determining Optimized Management Strategies for NS MEUs

References/Attachments

Presentation: Determining Optimized Management Strategies for Nova Scotia Municipal Electric Utilities, April 25, 2023

Legislation

The Alternative Resource Energy Authority (AREA) is a section 60 corporation under the Municipal Government Act.

Recommendation

That Town Council support AREA's resources to document and cost current operational and management processes of participating MEUs/Commissions, with an aim to develop an optimized operational model that provides functions for multiple NS MEUs.

Background

On April 25, 2023, Aaron Long, General Manager of AREA, presented a proposed scope of work to Town Council and Berwick Electric Commission, that would study alternative operational models that aggregate/consolidate municipal electric utility (MEU) functions/processes.

There is a lot of merit to completing this work from succession planning to finding efficiencies, but it also has additional benefits such as being ready to respond to future funding programs to assist our MEUs with grid upgrades, automated metering systems, etc.

Financial Implications

The Town of Berwick is an owner of AREA under section 60 of the Municipal Government Act. Although the Town is not required to financially contribute to this study, as an owner of AREA and it's role on the Board is to oversee the proper management of resources. This study will also require support from Town staff who also support Berwick Electric Commission (BEC).

AREA will be providing the resources on a cost recovery basis to complete the work. The work relates to BEC, and any financial cost will be paid by same. AREA has hired a new staff member who will assist with this work and seek funding resources to reduce the

**REQUEST FOR DECISION
RFD012-2023: Determining
Optimized Management Strategies
for NS MEUs**



overall net cost to the participating MEUs.

Priority Alignment

Check Applicable	Strategic Priority Area	Comments
X	Economic	
X	Environmental	
X	Social	
X	Cultural	

Alternatives

Town Council may choose not to support the work.

Community Engagement/Communication

AREA identified that there will be a public engagement component to this work, as well as regular progress and insight reporting to Council/Commission.

CAO Comments

I support the scope of work and believe there is tremendous merit in completing this study.

CAO Initials: JB

Target Decision Date: May 9, 2023



Determining Optimal Management Strategies for NS Municipal Electric Utilities

April 2023

Berwick Town Council

Berwick Electric
Commission





AREA delivers significant financial and environmental performance

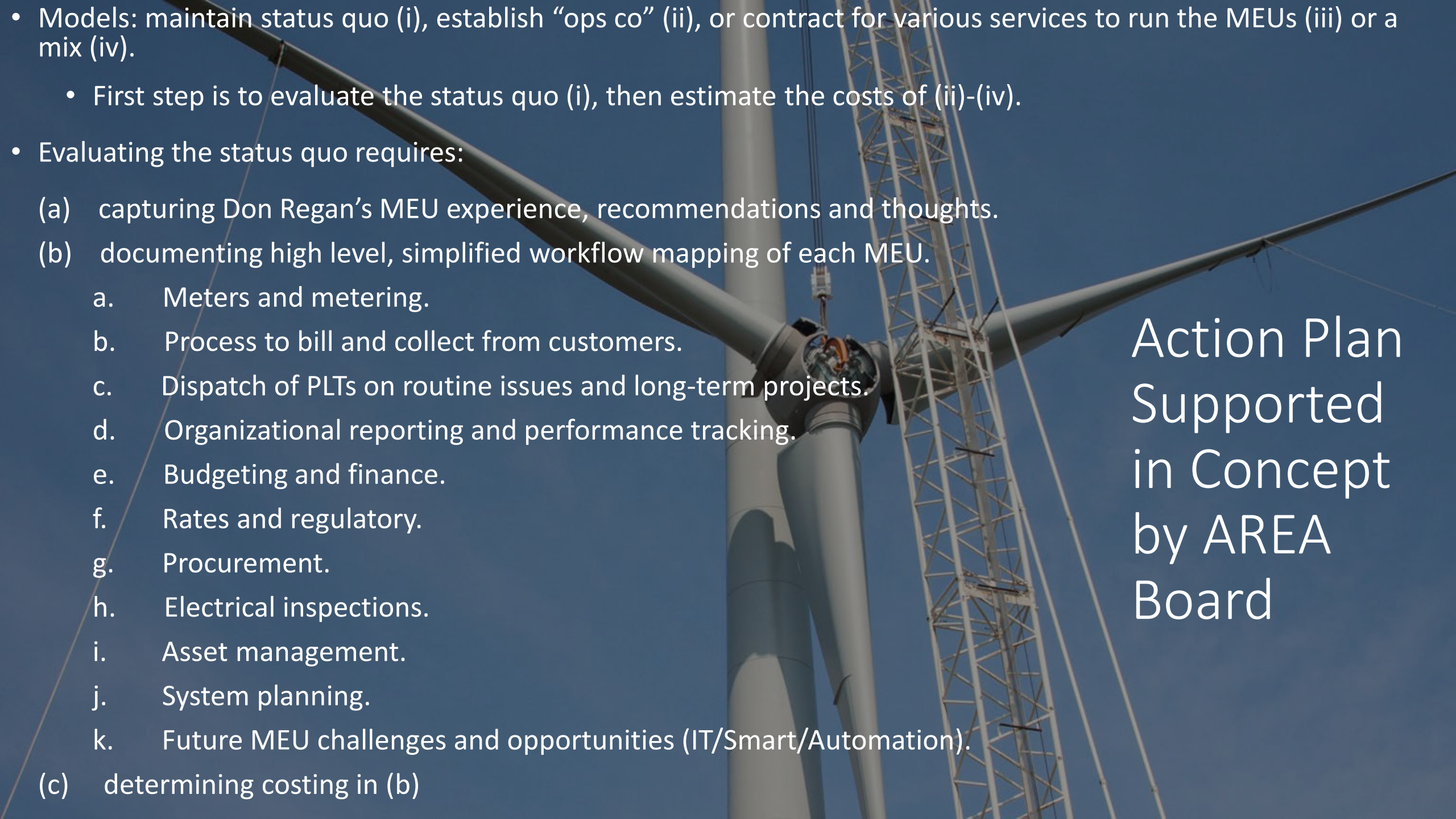
- Town Councils of Mahone Bay, Antigonish and Berwick took control of their energy destiny by creating AREA in 2013.
 - Have been consistently rewarded for their vision and leadership.
- Over \$23 million in value to the towns of Antigonish, Mahone Bay, and Berwick through wholesale power supply cost savings and operational dividends since 2018.
 - Also achieved over 315,000 tonnes of GHG reductions.
- Built the \$51 million, 10-turbine Ellershouse Windfarm, enabling Towns' unique compliance with 40% NS Renewable Energy Standard.
- Secured \$16 million of Federal and Provincial grants for 9MW community solar gardens, currently under construction.
- AREA staff provide continual support to NS municipal electric utilities, specifically related to unique business insights and regulatory support using our expertise, experience and capacity.

Municipal Electric Utilities are Businesses

- Operational cost pressures, procurement, asset management
- Regulatory cost and headspace, orders from the NS Utility and Review Board
- Human resourcing and succession planning
- Decarbonization
- Customer care and service, reliability, storm recovery
- Expectation of Town Councils and Commissions

- AREA sees merit in studying alternative operational models that aggregate/consolidate MEU functions/processes
 - Mahone Bay, Berwick, Riverport; Lunenburg? Antigonish - distance?
 - Similar yet currently separate systems delivering the same outcomes
 - Intuitively: unlikely that status quo is optimal solution



- 
- Models: maintain status quo (i), establish “ops co” (ii), or contract for various services to run the MEUs (iii) or a mix (iv).
 - First step is to evaluate the status quo (i), then estimate the costs of (ii)-(iv).
 - Evaluating the status quo requires:
 - (a) capturing Don Regan’s MEU experience, recommendations and thoughts.
 - (b) documenting high level, simplified workflow mapping of each MEU.
 - a. Meters and metering.
 - b. Process to bill and collect from customers.
 - c. Dispatch of PLTs on routine issues and long-term projects.
 - d. Organizational reporting and performance tracking.
 - e. Budgeting and finance.
 - f. Rates and regulatory.
 - g. Procurement.
 - h. Electrical inspections.
 - i. Asset management.
 - j. System planning.
 - k. Future MEU challenges and opportunities (IT/Smart/Automation).
 - (c) determining costing in (b)

Action Plan
Supported
in Concept
by AREA
Board

Funding: Municipal Innovation Program

- April: submit funding application to Province's Municipal Innovation Program.
 - Expected to cover any external study costs and implementation costs of recommendations.
- May: capture the processes and associated costing information of the status quo.
- June: bring NS MEUs together to discuss findings, dispatch low-hanging fruit.
- July: engage with MEUs in NB and PEI & abroad. AMI – hot topic.
- Aug-Sep: devise optimal management strategies inside operational models (prev slide).
- Oct: determine best operational model and associated management strategy.
 - assess and select existing resources available to the MEU collective.
- Nov: develop an implementation plan to achieve optimal structure.
 - and close any resourcing/asset gaps left after including existing resources/assets.



Public engagement throughout.

Regular progress and insight reporting to Town Councils.

AREA Adding Staff to Assist General Manager

- AREA's General Manager well suited to drive this process.
 - Hiring a new staff member immediately to perform the tasks in the listed scopes of work.
 - AREA proposing to perform this work at cost recovery of GM's and new hire's time.
 - \$100k net of Community Works funding, to be refined in Municipal Innovation Program application.
 - Proposing to allocate this cost among participating MEUs, with formal commitment required.
 - Berwick interested, Antigonish maybe later. Riverport is a good candidate. Lunenburg - depends.
 - ToMB should pursue this regardless of entering into cooperation agreement with Riverport, delivers value in both cases. It will be the same process.
- Additional benefits:
 - Enables quick response to additional funding programs.
 - AREA track record in this realm.
 - Grid upgrades – Lunenburg, ToMB and RELC; Smart Meters – all MEUs.
 - Potential end state could be a new inter-municipal service agreement (IMSA)
 - Each of these MEUs could hire the IMSA to provide some/all functions
 - Could be AREA or a new IMSA



Requested Motion

- That Town Council/Commission approve, in principle with something more formal to follow, paying AREA's cost recovery of documenting and costing current operational and management processes of participating MEUs, with an aim to develop an optimized operational model that provides functions for multiple NS MEUs.
- Stay tuned to review funding application to the Municipal Innovation Program, likely due end of May 2023.



Questions & Dialogue



REQUEST FOR DECISION

RFD012-2023: Accessibility Advisory Committee Member Appointment



To: Town Council
From: CAO
Date: May 9, 2023
Subject: Accessibility Advisory Committee Member Appointment

References/Attachments

Accessibility Advisory Committee Terms of Reference
Rita Shay, Committee Volunteer Application

Legislation

N/A

Recommendation

That Council appoint Rita Shay to the Town's Accessibility Advisory Committee for a two-year term.

Background

The Accessibility Advisory Committee (AAC) Terms of Reference (TOR) states that the committee will consist of eight voting members, of which at least three must be persons with disabilities or representatives from organizations representing persons with disabilities.

Over the last six months, three members of resigned and the AAC is reviewing the TOR and identifying new members. While the AAC will do a call for members, an application has been received, which the AAC reviewed and recommended approval by Council.

Financial Implications

N/A

Priority Alignment

Check Applicable	Strategic Priority Area	Comments
X	Economic	
X	Environmental	

**REQUEST FOR DECISION
RFD012-2023: Accessibility
Advisory Committee Member
Appointment**



X	Social	
X	Cultural	

Alternatives

Town Council may not approve the appointment.

Community Engagement/Communication

As mentioned above, the AAC and staff are preparing for a call for volunteers and identifying community members to approach to apply.

CAO Comments

I support the appointment of Rita Shay to the AAC.

CAO Initials: JB

Target Decision Date: May 9, 2023

REQUEST FOR DECISION

RFD011-2023: New Commercial Zero-Turn Mower



To: Town Council
From: Director Public Works
Date: May 9, 2023
Subject: New Commercial Zero-Turn Mower

References/Attachments

Tender BER2023-002 New 2022 or 2023 Commercial Zero-Turn Mower
2023/24 Capital Budget

Legislation

Purchasing and Tender Policy

Recommendation

To award tender BER2023-002 New Commercial Zero-Turn Mower to \$12,120.25 plus HST.

Background

A new commercial zero-turn mower was approved in the 2023/24 Capital Budget. The tender was issued on March 27, 2023 and closed on April 20, 2023.

The Town received five bids:

1. Jerrys RV Trailer sales and service ltd. (52-inch Commercial Zero-Turn Mower).
Price \$13234.00. Tax \$1985.10. **Total \$15,219.10**
2. MacKay's Bobcat (54-inch Residential Model Zero-Turn Mower).
Price \$9,177.06 Tax \$1,376.55 **Total \$ 10,553.62**
3. Maritime lawn-Garden (54-inch Model Zero-Turn Mower).
Price \$11,995.00 Tax \$ 1,799.25 **Total \$ 13,794.25**
4. Green Diamond Equipment ltd. (60- inch Commercial Zero -Turn Mower)
Price \$ 14,316.24 Tax \$2,147.44 **Total \$16,463.68**
5. Nova International Ltd. (60 -inch Commercial Zero -Turn Mower)
Price \$ 12,120.25 Tax \$1,818.04 **Price \$13,938.29**

Based on specifications, price, warranty, location and experience, the Director of Public Works is recommending the zero-turn mower with 60-inch deck from Nova International Ltd.

Financial Implications

The new mower was approved at \$13,000 from the Equipment Capital Reserve fund. The net cost to the Town after the HST rebate will be within the approved \$13,000.

REQUEST FOR DECISION
RFD011-2023: New Commercial
Zero-Turn Mower



Priority Alignment

Check Applicable	Strategic Priority Area	Comments
x	Economic	
	Environmental	
	Social	
	Cultural	

Alternatives

N/A

Community Engagement/Communication

N/A

CAO Comments

I support the recommendation of Staff.

CAO Initials: JB

Target Decision Date: May 9, 2023

REQUEST FOR DECISION

RFD014-2023: Surplus Equipment Approval



To: Town Council
From: Director Public Works
Date: May 9, 2023
Subject: Surplus Equipment Approval

References/Attachments

Tender BER2023-003 Surplus Equipment

Legislation

Purchasing and Tender Policy

Recommendation

To accept Ricky Balsor's bid for the Town's 2012 JCB Backhoe in the amount of \$16,200 plus HST.

Background

On April 11, 2023, Council approved swapping the replacement timing of the new plow truck and the new backhoe after the Town's existing backhoe experienced a catastrophic failure to the motor on April 6th, 2023. The Town prepared a tender to see what value they could receive for the current backhoe.

In a tender for Surplus Equipment was issued on April 17 and closed on May 4, 2023. The tender included five items:

1. 2012 JCB Backhoe with Blown Motor
2. Surplus wood from trees, approximately 2 cords
3. PTO, six-inch water pump
4. Two large pressure tanks
5. One large pressure tank

The Town received two bids for the Backhoe.

1. Ricky Balsor, \$16,200 plus HST
2. Darren Palmer, \$7,501 plus HST

Give the significant value of the backhoe, staff are seeking approval from Council to accept the bid for \$16,200 plus HST.

One bid was received for the wood. The bid for the wood was accepted.

Financial Implications

The money received from the surplus equipment will be deposited into the Town's

REQUEST FOR DECISION
RFD014-2023: Surplus Equipment
Approval



Equipment Capital Reserve fund.

Priority Alignment

Check Applicable	Strategic Priority Area	Comments
x	Economic	
	Environmental	
	Social	
	Cultural	

Alternatives

N/A

Community Engagement/Communication

N/A

CAO Comments

I support the recommendation of Staff.

CAO Initials: JB

Target Decision Date: May 9, 2023