



AMALGAMATION REPORT

BLACK DIAMOND & TURNER VALLEY

To: Honourable Ric McIver, Minister of Municipal Affairs

TABLE OF CONTENTS

AMALGAMATION REPORT	1
1. Overview	1
2. Negotiations Process	2
3. Why Amalgamate	3
4. Consultations	4
5. Negotiations Supporting Documents	8
6. Commitment to Proceed	10
7. Summary	14
APPENDIX 1: What We Heard Report	16
APPENDIX 2: FAQ	142
APPENDIX 3: Finance Report to Public	175
APPENDIX 4: Local Authorities Consultation	191
APPENDIX 5: Engagement Strategy	224
APPENDIX 6: Communications:	239
a) Public Information Paper	240
b) Media Coverage	259
c) Risks and Mitigations	289
APPENDIX 7: Black Diamond and Turner Valley Amalgamation Feasibility Study	296
APPENDIX 8: Negotiation Charter	364
APPENDIX 9: JFAC Motions Passed on Negotiation Topics	372
APPENDIX 10: JFAC Reports:	377
a) March 10, 2021: Procedure Subcommittee Report	378
b) May 12, 2021: Emergency Services Subcommittee Report	383
c) May 12, 2021: Procedure Subcommittee Report	385
d) June 23, 2021: Procedure Subcommittee Report	391
e) June 23, 2021: Finance Subcommittee Report	395
f) June 23, 2021: Public/Stakeholder Consultation Subcommittee Report: Electoral Wards	423
g) June 23, 2021: Public/Stakeholder Consultation Subcommittee Report: Naming	426
APPENDIX 11: Sheep River Library Board Considerations for Amalgamation	431
APPENDIX 12: Westend Regional Sewage Services Commission Disestablishment Bylaw	433
APPENDIX 13: List of Other Required Transition Plans	445
APPENDIX 14: Boundary Map	447



AMALGAMATION REPORT

BLACK DIAMOND & TURNER VALLEY

To: Honourable Ric McIver, Minister of Municipal Affairs

1. OVERVIEW

The Towns of Black Diamond and Turner Valley are presenting this report to the Honourable Minister of Municipal Affairs to formally propose that the two existing municipalities be dissolved and a new amalgamated municipality, the Town of Diamond Valley, be established as consistent with provisions of the Municipal Government Act.

The prospect of amalgamation between Black Diamond and Turner Valley has been a matter of considerable discussion for many years, and was explored in 1988, 1991, 2005 and most recently in 2017 with the completion of the amalgamation feasibility study (included in [Appendix 7](#)).

In 2012, the Towns created the Friendship Agreement, with the goal of promoting collaborative relationships and shared services. In early 2020, a decision was made to formalize the relationship with the creation of the Joint Friendship Agreement Committee (JFAC) and a deliberate move towards amalgamation was pursued. In September of 2020, the Towns of Black Diamond and Turner Valley presented a letter to the Minister advising of their intent to amalgamate and commence in negotiations.

Both Councils engaged in negotiations and amalgamation review through a structured process as guided by the Negotiations Charter (included in [Appendix 8](#)) and with the aid of an independent negotiation facilitator.

The following report provides an outline of the negotiations process, public consultation, reasons for amalgamating, supporting documents, and key outcomes. The report includes commitments and requirements for the establishment of a new municipality as agreed upon by both Councils of the Towns of Black Diamond and Turner Valley.

2. NEGOTIATIONS PROCESS

To ensure that all amalgamation negotiation topics were reviewed thoroughly, four subcommittees were established consisting of equal Council representation by both Towns and related administrative support from both Towns:

1. Finance Subcommittee
2. Public/Stakeholder Consultation Subcommittee
3. Emergency Services Subcommittee
4. Procedure Subcommittee

Each subcommittee was responsible for reviewing all necessary information and making recommendations on their topics to JFAC for final decision making. Motions passed by JFAC on these recommendations form commitments to proceed on mandatory and transitional topics outlined in Section 6. Detailed information is available in JFAC reports ([Appendix 10](#)), Finance Report to Public ([Appendix 3](#)) and the motions as passed are included in [Appendix 9](#).

The amalgamation process occurred over the following timeline:

Activity	Timeline
Notification to the Minister of Municipal Affairs of Negotiations with the Intent to Amalgamate	September 15, 2020
JFAC Project Scoping and Negotiations on Mandatory Topics	October – December 2020
Subcommittee Scoping, Negotiations and Recommendations	December 2020 – June 2021
Public/Stakeholder Consultation	February – July 2021
JFAC Decision on Amalgamation	August 2021
Town Council Decisions on Amalgamation	September 2021
Submission of Amalgamation Report to the Minister of Municipal Affairs	September 2021
Anticipated Order in Council	June 2022
Anticipated Incorporation Date	January 1, 2023

3. WHY AMALGAMATE

Through the amalgamation process, JFAC and the subcommittees explored the benefits and risks associated with a potential amalgamation. After reviewing all the information through the subcommittee work, no red flags to proceeding with amalgamation were raised. Detailed findings are included in Appendix 10. JFAC carefully weighed the findings before making decisions and determined that amalgamation offers the best future for the communities by moving forward together. Here's what we learned.

The flood of 2013 showed Black Diamond and Turner Valley the true nature of collaboration. The Towns have a long history collaborating, but the flood brought us closer together to help one another through hardship and develop shared values for a stronger community – we saw that we are one.

Black Diamond and Turner Valley have long discussed amalgamation, and four decades of past councils have seen the value in collaboration and partnership. We share the same water and utilities, as well as community services like the Sheep River Library and emergency services. Duplicate funding and services exist between the two communities such as Family and Community Support Services funding programs and a number of duplicate committees working in tandem.

Amalgamation is the next natural step to bring us together and grow sustainably and responsibly. Now is the time to remove obstacles, streamline processes, achieve faster results, and strive to be as efficient and effective as possible in reaching shared goals. Amalgamating will provide opportunity for future Councils and administration to work seamlessly as one organization with a common vision, pooled resources for investment, and greater access to Provincial and Federal grants and funding.

The amalgamation financial analysis showed that both Towns are in good financial position and are very similar to each other in most financial respects. No red flags have been identified on financial issues, and some benefits have been identified such as:

- One municipality will require only one CAO and one Council. This streamlines decision-making, expedites timelines and provides a focused central approach.
- If Provincial and Federal grants and funding are reduced significantly in upcoming years, the new municipality will be able to maximize access to funding support and ultimately do more with the money received.
- Until now, amalgamating would have created significantly more costs to policing. This is no longer the case because of recent changes to the provincial funding model. Amalgamation will provide grant opportunities to offset the additional costs and would not be available without amalgamation.

Our towns are growing, and it is time to take a holistic view of our shared region to be economically responsible for how we grow together. Turner Valley has seen a record number of development permits; Black Diamond has annexed land and welcomed new businesses. As one together, we can bolster local economic development with less duplication and direct competition to ensure a healthy and diverse economy. Amalgamation will allow for comprehensive long-term and prioritized land and infrastructure planning to attract the development industry and better service our region for the future.

We already share resources and natural assets. Together we can address connectivity of green spaces, pathway systems, infrastructure, services, and economic development so that we look and feel like the community we want to live in.

While amalgamation doesn't guarantee more efficient service delivery, it provides the opportunity for future Councils and administrations to be more efficient and potentially reduce operating costs. Once amalgamated, the new municipal Council and administration will explore how to deliver the most effective and efficient municipal services to meet the service level expectations of residents.

4. CONSULTATIONS

In September 2020, JFAC voted to proceed with the intent to amalgamate pending a thorough technical review and negotiations. JFAC's decision to proceed in this manner was informed by a lengthy history of amalgamation discussions between the two Towns, successful collaborative initiatives and processes over many years, continual community pulse taking and a belief that amalgamation would best serve the two communities moving forward.

As an elected representative of the public, JFAC chose not to pursue a plebiscite, but instead to ask questions for public input that would inform specific recommendations if amalgamation was to proceed once the technical review was completed. However, throughout the process many comments and questions indicated support or opposition for amalgamation (all verbatim comments can be found in the What We Heard Report, [Appendix 1](#)). Responses were varied, many comments were in support and many comments of concern or opposition were also collected. However, as the process unfolded and more information was made available to the public, questions and comments focused more on the logistics of an amalgamation.

JFAC considered all public/stakeholder input throughout the negotiations.

Consultation Overview

Throughout the amalgamation process, both Councils strived to maintain concise, clear, and transparent communication with the public. Information was made available to stakeholders in a timely and proactive manner, with specific focus on:

- The amalgamation process (what is happening, why, when and how),
- Topics stakeholders had input on, and;
- How that input influenced associated decisions.

Due to the technical nature of many of the negotiation topics, comprehensive information was distributed as part of a stakeholder education campaign as early as possible – educating the public on the process, content, and decisions in real time. A Public Information Paper was created providing an overview of the process and background to amalgamation early in the project ([Appendix 6a](#)). The PIP was updated with JFAC decisions regularly.

Residents and all impacted stakeholders had online access to project information and progress updates through dedicated Town webpages, regular social media updates, press releases, and opportunity to

contact the Towns directly with their questions or concerns. Both Towns welcomed public feedback and questions on all topics to understand and address hopes and concerns for the amalgamation.

A significant number of similar questions were submitted to the Towns' amalgamation emails in advance of the Kick-off Public Meetings. The Towns decided to create a FAQ document to address these questions and questions arising from all public meetings ([Appendix 2](#)). The FAQ was updated through the amalgamation process as more information was learned.

Stakeholder groups, other than the public, received a letter informing them of the intent to amalgamate, including a fact sheet overview of the process, opportunity to provide input, a link to the municipal website amalgamation pages, and a request to provide their specific feedback/questions within 30 days ([Appendix 4](#)). Responses were received from Atco, Fortis, the Town of Okotoks, Canada Post, and Foothills Search and Rescue. No other stakeholders provided feedback.

The feedback from both Atco and Fortis addressed considerations for franchise agreements such as fee structure, municipal name and boundaries in regard to the agreement, and steps required for transition in the event of amalgamation. Feedback from the Town of Okotoks posed questions regarding the eligibility of a new amalgamated municipality for membership to the Calgary Metropolitan Region Board (CMRB) and requested consideration of CMRB membership as part of the amalgamation request. The Town of Okotoks posed other questions about how amalgamation might affect partnership with the Town of Black Diamond to deliver the 2023 Summer Games, as well as impacts on shared service delivery models.

Correspondence with Canada Post centred on the impact of amalgamation on mailing addresses, and Canada Post confirmed it would not make changes to current mailing addresses unless requested by the municipality. Response from Foothills Search and Rescue requested confirmation of which callout system will be used for the new municipality and stated that either system is suitable. A list of stakeholders and correspondence is included in [Appendix 4](#).

There were four main public engagements throughout the negotiations:

1. [Kick-off Public Meetings](#)
2. [New Amalgamated Municipality's Name Activity](#)
3. [Electoral Representation Activity](#)
4. [Public Report Back Meetings](#)

Most engagement efforts were held online due to current circumstances with COVID-19.

A detailed description of all engagement events, activities, themed feedback, verbatim responses and advertising overview is included in the final What We Heard Report ([Appendix 1](#)).

1. [Kick-off Public Meetings](#)

The Kick-off Public meetings were held early in the process with two dates (March 30, 2021, and April 1, 2021) for participation. Each session covered the same material. A presentation was delivered by the Mayors of both Black Diamond and Turner Valley overviewing the amalgamation

negotiation background, process, progress to date and next steps. Participants asked questions and provided comments. The events were moderated and where able, questions were answered by the Town Mayors and CAOs during the event.

In addition to general Q&A, a survey accompanied the event and was available for 10 days following on the Towns' websites, posing three questions:

- What is your greatest concern around amalgamation?
- What is your greatest hope with amalgamation?
- What do you want to know more about through this amalgamation process?

Consistently throughout the engagement process, public concerns were raised about potential costs or tax increases associated with amalgamation; equal representation of both communities under the amalgamated town; transparency in process; and lack of a public plebiscite/referendum. Hopes were expressed for a shared identity; better and improved services; and decreases in taxes and costs.

Additionally, the naming of the new Town was frequently mentioned as important to participants. Many residents expressed the hope that each Town would retain its name and an overall new name be chosen for the municipality. This theme was further explored through the focused Naming Activity.

Approximately 140 people attended the events and 180 people participated in the survey.

Leading up to the Kick-off Public Meetings, many participants submitted questions and comments. Questions received throughout the activity were collected and answers are provided in the FAQ ([Appendix 2](#)).

2. New Amalgamated Municipality's Name Activity

The public naming activity asked participants to first submit their ideas for the proposed new Municipality's name as well as any supporting stories, drawings, or photos to explain the significance of their idea. A second phase of the activity was open for 7 days as an online survey and asked participants to vote for their choice from the top three most frequently submitted names:

- Town of Diamond Valley
- Town of Sheep River
- Town of Black Valley

More than 150 people participated in the first phase of naming and more than 1100 responses were received in the survey.

The entire activity saw a high rate of engagement, creative submissions, and an overwhelming response in favour of the name "Town of Diamond Valley" making up 74 percent of survey responses.

3. Electoral Representation Activity

The Electoral Representation Activity consisted of an online survey that asked participants which type of electoral representation they preferred for the proposed new amalgamated Town:

- At Large Representation
- Wards
- I don't know

A secondary question asked participants to specify their preference for type of wards from the following:

- Transitional Wards
- Permanent Wards

The majority of participants voted for 'at large' representation (49 percent). 44 percent of participants voted for ward representation and 8 percent selected 'I don't know'. 73 percent of those who voted for wards selected permanent wards, 22 percent transitional, and 5 percent no description.

More than 170 people participated.

4. Public Report Back Meetings

The Report Back online public meetings were held in the final stages of negotiations with two sessions held on July 22, 2021, in the morning and evening. Each session covered the same material. A presentation was delivered by the Mayors of both Black Diamond and Turner Valley overviewing the amalgamation negotiation background, process update, engagement and finance updates, an overview of negotiation outcomes, and next steps. Participants asked questions throughout and provided comments. The events were moderated, and where able, questions were answered by the Town Mayors and CAOs during the events.

Throughout the events, questions and comments from the public covered general financial and process themes, as well as costs and savings of amalgamation. Other themes emerging from public questions touched on how the municipality's name change would affect addresses and licencing, concerns over outcomes yet to be decided by future council, and the overall advantages of amalgamation.

Approximately 67 participants attended the events.

Questions received leading up to and during the Public Report Back Meetings were collected and are included in the What We Heard Report ([Appendix 1](#)) and responses to questions provided in the FAQ ([Appendix 2](#)).

5. NEGOTIATIONS SUPPORTING DOCUMENTS

The amalgamation negotiation involved a significant amount of planning, information collection, and communications with stakeholders on process, engagement and outcomes. The documents are included as appendices to provide background for decisions made by the two Councils.

List of Appendices:

- 1) [What We Heard Report](#)
The report summarizing all amalgamation engagement opportunities reflecting trends in feedback and ideas expressed by the public along with comprehensive event data and verbatim responses and includes advertising summaries for engagement.
- 2) [FAQ](#)
A document addressing the public's frequently asked questions on various amalgamation topics grouped by theme.
- 3) [Finance Report to Public](#)
The report addressing the final findings of the Finance Subcommittee on the financial comparison between Black Diamond and Turner Valley and subsequent recommendations.
- 4) [Local Authorities Consultation](#)
The list of stakeholders and an example stakeholder letter as well as responses received.
- 5) [Engagement Strategy](#)
The Engagement and Communications Strategy used to guide all engagements.
- 6) [Communications](#)
 - a) [Public Information Paper](#)
A comprehensive overview of the amalgamation process with background, timeframe, engagement opportunities, links to stakeholder input, technical data and supporting information, as well as decisions made by JFAC.
 - b) [Media Coverage](#)
Copies of media articles on the amalgamation negotiations.
 - c) [Risks and Mitigations](#)
An email provided by Councillor Ted Bain
- 7) [Black Diamond and Turner Valley Amalgamation Feasibility Study](#)
A 2017 study to examine the feasibility of amalgamation through critical analysis of the Towns' current reality and a series of strategic objectives to help evaluate decisions against a shared vision. The study explored three options for collaboration: status quo; comprehensive collaboration; and amalgamation.
- 8) [Negotiation Charter](#)
The Negotiation Charter was the guiding framework and includes: vision, principals and shared objectives, scope, outcomes and success factors, roles and communications expectations, decision-making model, project risks and mitigations, key deliverables, and key milestones and schedule.
- 9) [JFAC Motions Passed on Negotiation Topics](#)
A listing of all motions as adopted by JFAC on the amalgamation negotiation topics.

10) [JFAC Reports](#)

Reports detailing the findings brought to JFAC by subcommittees, their recommendations, and proposed motions on negotiation topics.

[March 10, 2021: Procedure Subcommittee Report](#)

[May 12, 2021: Emergency Services Subcommittee Report](#)

[May 12, 2021: Procedure Subcommittee Report](#)

[June 23, 2021: Procedure Subcommittee Report](#)

[June 23, 2021: Finance Subcommittee Report:](#)

- Information as presented on June 23, 2021. Amendments to the content were made at JFAC's direction and included in the Finance Report to Public.

[June 23, 2021: Public/Stakeholder Consultation Subcommittee Report: Electoral Wards](#)

[June 23, 2021: Public/Stakeholder Consultation Subcommittee Report: Naming](#)

11) [Sheep River Library Board Considerations for Amalgamation](#)

A document summarizing the impacts of amalgamation on the Sheep River Library Board along with considerations, suggested next steps, and a listing of items for the current Library Board to have in place prior to amalgamation.

12) [Westend Regional Sewage Services Commission Disestablishment Bylaw](#)

A bylaw that sets the timing and terms of disestablishment of the Westend Regional Sewage Services Commission.

13) [List of Other Required Transition Plans](#)

A list of items the Town of Black Diamond and the Town of Turner Valley have committed to completing within an appropriate timeline as part of the transition process in amalgamation.

14) [Boundary Map](#)

Map of combined boundaries of the Town of Black Diamond and the Town of Turner Valley that is requested to form the newly amalgamated municipality.

6. COMMITMENT TO PROCEED

Both Councils formally support the amalgamation negotiations report. The Town of Black Diamond and Town of Turner Valley submit this amalgamation application requesting the Minister of Municipal Affairs proceed with amalgamation.

Consistent with the requirements of the Municipal Government Act, the Councils of both municipalities have approved the following elements for the new Town and request that the Minister incorporate them in establishing the Municipality.

Based on negotiations, JFAC requests that the Province:

- a. Amalgamate the Towns of Black Diamond and Turner Valley.
- b. **Topic #1: Name:** Name the new Town “Town of Diamond Valley”. The name Diamond Valley has been the unofficial name of the area for decades with some businesses using Diamond Valley as part of their business name. Reviews were undertaken to ensure the name:
 - is not currently used by any other municipalities in Alberta,
 - does not infringe on any trademarks, and
 - does not use prohibited terms.

No municipalities use the name Diamond Valley. The only diamond reference is a hamlet north of Lethbridge that is called Diamond City. The review involved:

- Alberta Geographical Names Database has no records of the name Diamond Valley;
- The Post Offices and Postmasters database lists only references to Black Diamond and Diamond City in its records;
- William Baergen’s book *Pioneering with a Piece of Chalk* lists a school district called Diamond Valley School District No. 2154 that was established in 1910 near Eckville. It seems that this reference to Diamond Valley started as a school district name that became used as an unofficial name for the region, but it is not currently used; and
- A review of trademarks operating in Canada only listed one company with reference to Diamond Valley with no conflicting purpose.

The review showed no existing conflicts with the use of Diamond Valley as the name for the new amalgamated municipality.

- c. **Topic #2: Municipal Boundaries:** Create the new Town boundaries by combining the areas of the Town of Black Diamond and the Town of Turner Valley as of August 25, 2021, as shown in Appendix 14 (map) as per the legal boundaries already on file with AltaLIS.
- d. **Topic #3: Municipal Status:** Establish the new municipality with Town status. The newly amalgamated municipality fits the MGA definition of Town (Section 81) because the majority of buildings are on parcels of land smaller than 1850 m² and there will be a population of ~5000, much larger than the minimum requirement of 1000.
- e. **Topic #4: Electoral Wards:** Enable “at large” electoral representation for the amalgamated municipality first election. No electoral wards are proposed.
- f. **Topic #5: Council Representation:** Provide for a seven (7) member Council, six (6) Councillors and a Mayor, to be elected at large to represent the new municipality upon its incorporation.

- g. Topic #6: Municipal Office Location:** Establish the main municipal office be located in the existing Town of Black Diamond at 301 Centre Avenue West. The Town's mailing address is:

Town of Black Diamond
Box 10
Black Diamond, AB
T0L 0H0

- h. Topic #7: Proposed Incorporation Date:** Incorporate the new municipality as of January 1, 2023
- i. Topic #8: Annexation of Land to Achieve Contiguous Boundary:** No annexation is required because it was previously completed.

j. Topic #9: Other Matters

- Utilities: Confirm that the current utility rates for each municipality be continued until such time as a new utility rate bylaw is established.
- Westend Regional Sewage Services Commission: Accept the recommendation from the commission for a disestablishment date of December 31, 2023. The Commission has included the bylaw as per MGA S609.09(1) in [Appendix 12](#).
- Intermunicipal Collaboration Framework (ICF): Accept confirmation that the ICF deadline has been previously extended until April 1, 2022, and that the Towns will request an adjusted deadline for an ICF between the new municipality and Foothills County.

- k. Topic #10: Interim Council:** No interim Council is required because the proposed election date is Nov. 28, 2022.

- l. Topic #11: Interim CAO:** Appoint the current CAO of Turner Valley, Shawn Patience, as Interim CAO. If a secondary option is required, appoint the current CAO of Black Diamond, Sharlene Brown, as Interim CAO.

- m. Topic #12: First Election:** Establish November 28, 2022 as the first election date. The two Councils strongly prefer an election in advance of the incorporation date. The date of November 28th was chosen to be as close to the proposed incorporation date as possible considering the winter holiday season. There will be only one Council meeting for each municipality in December 2022 before incorporation. The election of Council prior to incorporation enables the newly amalgamated municipality to immediately start establishing permanent continuation of services (i.e., library services, emergency services), organizational vision, and undertaking the operational work of amalgamating.

Should the strongly preferred election date of November 28, 2022, not be approved, it is requested that a fourteen (14) member Council be appointed comprised of the council elected in October 2021, with a mayor appointed from those fourteen (14) sitting Council members (MGA 150) for a period of 90-120 days after incorporation until the first election occurs.

- n. Topic #13: 2021 General Election:** No conflicts exist with the 2021 General Election because the proposed incorporation date is January 1, 2023.
- o. Topic #14: Returning Officer:** Appoint the current Returning Officer of Black Diamond, Verna Staples, to act as the Returning Officer for the first election of Council for the newly amalgamated municipality.
- p. Topic #15: Ward Boundary Review:** No ward boundaries review is required because the Towns are requesting "at large" election representation.

- q. **Topic #16: Compensation to Other Municipal Authorities:** Require the newly amalgamated municipality to pay Foothills County for previous contractual agreements which include annexation agreements and a municipal road maintenance agreement. Payments by the new municipality will be made in the sum of \$32,154/year until 2024 at which time the payment would be reduced to \$10,000/year with last payment made in 2030.
- r. **Topic #17: Financial Transition:** Require that independent audits be conducted for Black Diamond and Turner Valley for the year ending December 31, 2022. An audit for the newly amalgamated municipality will be conducted for year-end December 31, 2023, relying on the individual audits conducted in the previous year.
- s. **Topic #18: Interim Tax Treatment:** No interim tax treatment is required because the proposed incorporation date is January 1, 2023.
- t. **Topic #19: Tax Treatment (Previous Annexations):** Acknowledge that for the lands annexed by Black Diamond to unify a boundary between the Towns of Black Diamond and Turner Valley, for the purposes of taxation in 2020 and in each subsequent year up to and including 2044, these lands must be assessed as if in the County of Foothills, and taxed as in the County of Foothills, until a triggering event noted in the annexation agreement.
- u. **Topic #20: Authority to Impose Additional Tax (to Service Pre-Amalgamation Debt):** Acknowledge that no additional tax to service pre-amalgamation debt is being requested. The Towns have agreed that:
- The Towns request the Local Improvement levies to remain with the Town of Turner Valley properties until such time as they are paid in full.
 - Operating revenues will continue to support the existing debts of both municipalities before and after amalgamation.
 - Designated capital reserves will remain in the individual municipalities until they are utilized. All existing undesignated capital reserves should be designated to restricted dedicated reserves contained within their 10-year capital plans prior to incorporation date. Operating reserves should be contributed to equally based on Black Diamond and Turner Valley's requirements with the remainder to be designated to capital reserves.
 - The ten-year capital plan will be utilized as the indicator of the infrastructure condition and costs to upgrade. For the ten-year capital plan, Turner Valley has \$28.4M planned and Black Diamond has \$38.4M planned. This will assist with addressing the infrastructure variations between the two towns by comparing priorities in each municipality.
- v. **Topic #21: Assessment:** There is no need to treat property assessments differently since the proposed incorporation date is Jan. 1, 2023.
- w. **Topic #22: Employees and Labour Agreements:** Require that all current employees of the municipalities at the time of amalgamation shall become employees of the new municipality to ensure uninterrupted service delivery until such time as the CAO, in conjunction with the Council elected in 2022, have determined service levels and organizational structure.
- x. **Topic #23: Bylaws and Resolutions of Existing Municipalities:** Include deferral of bylaw and resolution updates until after the date of incorporation.

- y. **Topic #24: Emergency Services:** Require that the newly amalgamated Town will maintain service levels until such time as the new CAO and the new Council determines the service levels and organizational structure.

The Towns of Black Diamond and Turner Valley have agreed that the level of service will be maintained for three branches of Emergency Services which includes Fire, Emergency Management and Community Peace Officers in both Black Diamond and Turner Valley until incorporation date.

Require that all existing staff and all existing bylaws and resolutions of the Towns of Black Diamond and Turner Valley will carry over to the new municipality including the emergency management bylaws and plans, and the appointment of the directors of emergency management required by the Emergency Management Act.

- z. **Topic 25: Library Services:** Require the continuation of library services after the date of incorporation of the newly amalgamated municipality.

Require that all library rights, assets and liabilities of the intermunicipal library board should be transferred to the Towns of Black Diamond and Turner Valley to be held in trust under the newly amalgamated municipality until the new municipal library board is established.

- aa. **Topic 29: Local Authorities Consultations:** Local authorities, agencies, boards, commissions, and other stakeholders were invited to participate in the amalgamation process through a decided stakeholder notification letter and information sheet. The stakeholder letter and complete list of stakeholders is included in [Appendix 4](#).

- bb. **Topic 30: Public Consultations:** Public consultations were conducted through various events and activities as described above in Section 4, and through the What We Heard Report ([Appendix 1](#)) as well as the Engagement Strategy ([Appendix 5](#)), and Communications ([Appendix 6](#)).

There are no matters the municipal authorities have not agreed upon.

7. SUMMARY

The Towns of Black Diamond and Turner Valley have negotiated on required amalgamation topics to bring together the strengths of both communities and ensure a smooth transition. Councils have worked together to comprehensively assess the opportunities and risks of amalgamation and have compiled a strong case for incorporation as the new “Town of Diamond Valley”.

This report has been approved by resolution for presentation to the Minister by both Councils. As per the Municipal Government Act Section 105(2)(a), we certify that this report accurately reflects the results of the negotiations.

Respectfully submitted,

Her Worship Ruth Goodwin, Mayor

Black Diamond

September _____, 2021

Town Seal

His Worship Barry Crane, Mayor

Turner Valley

September _____, 2021

Town Seal

LIST OF APPENDICES

1. What We Heard Report
2. FAQ
3. Finance Report to Public
4. Local Authorities Consultation
5. Engagement Strategy
6. Communications:
 - a. Public Information Paper
 - b. Media Coverage
 - c. Risks and Mitigations
7. Black Diamond and Turner Valley Amalgamation Feasibility Study
8. Negotiation Charter
9. JFAC Motions Passed on Negotiation Topics
10. JFAC Reports:
 - a. March 10, 2021: Procedure Subcommittee Report
 - b. May 12, 2021: Emergency Services Subcommittee Report
 - c. May 12, 2021: Procedure Subcommittee Report
 - d. June 23, 2021: Procedure Subcommittee Report
 - e. June 23, 2021: Finance Subcommittee Report
 - f. June 23, 2021: Public/Stakeholder Consultation Subcommittee Report: Electoral Wards
 - g. June 23, 2021: Public/Stakeholder Consultation Subcommittee Report: Naming
11. Sheep River Library Board Considerations for Amalgamation
12. Westend Regional Sewage Services Commission Disestablishment Bylaw
13. List of Other Required Transition Plans
14. Boundary Map

APPENDIX 1

What We Heard Report



STAKEHOLDER REPORT BACK: WHAT WE HEARD 2

BLACK DIAMOND & TURNER VALLEY AMALGAMATION:
ENGAGEMENT REPORT BACK

August 17, 2021



TABLE OF CONTENTS:

PROJECT BACKGROUND	2
ENGAGEMENT OVERVIEW	3
WHAT WE HEARD	9
Website Feedback	10
Public Event #1	12
Survey Results	14
Engagement Activities	18
Public Event #2	24
VERBATIM RESPONSES	26
Town Websites	26
Public Event #1 Comments	33
Survey Comments	38
Ward Activity Comments	65
Naming Activity Submissions	66
Public Event #2 Comments	84
APPENDIX 1: Public Event #1 Presentation	87
APPENDIX 2: Ward Activity Primer	99
APPENDIX 3: Public Event #2 Presentation	101
APPENDIX 4: Additional Public Responses	120

PROJECT BACKGROUND

The prospect of amalgamation between Black Diamond and Turner Valley has been a matter of considerable discussion for many years, and was explored in 1988, 1991, 2005 and most recently in 2017. Over the years, amalgamation related discussion has required extensive time, energy, and resources from both Towns.

In 2012, the Towns created the Friendship Agreement, with the goal of promoting collaborative relationships and shared services. In early 2020, a decision to formalize the relationship with the creation of the Joint Friendship Agreement Committee (JFAC) and a deliberate move towards amalgamation was pursued. After considerable discussion, in September of 2020, the Towns of Black Diamond and Turner Valley presented a letter to Alberta Municipal Affairs to formally notify that the two existing municipalities will be commencing negotiations with the intent to amalgamate.

As established in the most recent [2017 Amalgamation Feasibility Study](#) developed by both the Towns, and as outlined in the [recent letter to Municipal Affairs](#), the guiding principles of the amalgamation process have been defined as:

- **Balancing service levels with long-term cost;**
- **Joint decision making that is effective, adaptive, and based on honesty and integrity, and;**
- **Developing and implementing policies that are fact based, action focused, and achievable within a realistic and feasible timeframe.**

The Shared Objectives Are:

- **Diversified and Resilient Economy:** shared investment in strengthening the local economy;
- **Integrated Policy Framework:** aligning policies with shared growth objectives;
- **Sustainable Service Delivery:** more effective and efficient delivery of municipal services;
- **Expanding Community Capacity:** shared commitment to ongoing engagement with citizens, and;
- **Responsive Local Governance:** long-term and prioritized land and infrastructure planning.

The JFAC is intent on amalgamating, however, a final decision will not be made until all related topics have been reviewed thoroughly by the JFAC. If at any point it does not seem prudent to proceed, the amalgamation negotiations will conclude.

For more detailed information on the amalgamation review and negotiation process, review [The Public Information Paper](#). The Public Information Paper can be found on both Town websites and contains the most comprehensive overview of the amalgamation process and current progress updates.

ENGAGEMENT OVERVIEW

For public consultations, the MGA provides very simple requirements that must be completed as part of the amalgamation process. A plebiscite is not required; however, whatever methods of consultation are used must be documented. The amalgamation application must include: a description of the public consultation processes involved in the amalgamation negotiations, and a summary of the views expressed during the public consultation processes (regardless of whether they are positive/support, negative/oppose, or other).

Engagement Objectives for the Amalgamation Process:

Throughout the amalgamation process, communication has been concise, clear, and transparent. Engagement/communication outreach set out to inform all stakeholders in a timely and proactive manner, with a focus on:

- The amalgamation process (what is happening, why, when, and how)
- Topics stakeholders will have input on, and;
- How that input will/did influence associated decisions.

General Engagement Approach:

Throughout the entirety of the process, residents (and all impacted stakeholders) had on-line access to project information and the opportunity to provide feedback and ask questions on all topics.

Additionally, there were:

- Two specific engagement activities with the intent to seek input, and
- Two public events (planned to be on-line). One event with two sessions was held early in the process, while the second event's two sessions were held at the final stage of the process.

Stakeholder groups, other than the public, received a letter informing them of the intent to amalgamate, including a fact sheet that provided an overview of the process, opportunity to provide input, a link to the municipal website amalgamation pages, and a request to provide their specific feedback/questions within 30 days.

The two topics that the public had direct input on the outcome are:

- The proposed Municipality's new name, and;
- Whether a ward or general election system is preferred.

Overall engagement activities with timelines are outlined here:

Engagement Activities and Timeline:

Activity/Event	Approximate Timeline
Kick-off Engagement	Mid February 2021 (complete)
Letters to Stakeholders	March 2021 (complete)
Public On-line event #1	March 30 & April 1, 2021 (complete)
Activity #1 (electoral wards or general)	May 17 – May 31, 2021 (complete)
Activity #2 (name)	May 19 – June 20, 2021 (complete)
Public On-line event #2	July 22, 2021 (complete)

Engagement Reporting:

Reporting engagement feedback is a critical component for the amalgamation process and will be included in the final report to Municipal Affairs. All comments, regardless of the activity and tool, were collected and summarized in the *What We Heard Reports* (WWHRs).

- The WWHR document in detail:
 - Q&As (from the Towns' websites and from the amalgamation events)
 - Amalgamation event and activity input/comments (verbal and written)
 - Additional comments collected by project team/committee members/administration (verbal and written), if appropriate

This final WWHR contains all stakeholder input after the completion of engagement. The final WWHR also includes sections on *What We Did* (WWD) that overview how stakeholder input impacted JFAC decisions that were/are being made. WWHRs are made public and will be posted on the website once complete.

WWHR #1

All public input collected through the Town websites, the public kick-off event, and related online survey, was reviewed and themed with the intent to provide a high-level pulse of what input was provided or asked the most often. All questions and comments were also provided verbatim at the end of the report.

WWHR #2

This final WWHR includes all content from WWHR #1 as well as input and outcomes from the public engagement activities and final public event, and all verbatim responses from stakeholder engagement throughout the amalgamation process.

Public Event #1

The focus for the first public event was:

1. Amalgamation process engagement kick-off (first public meeting)
2. Inform the public on the project background, process, timelines, and progress
3. To collect feedback on what topic/information the public considers to be important
4. Obtain general sentiment on the public's views around amalgamation

Two dates and times were provided for the online public events: March 30th from 6:30-7:30 pm with approximately 80 participants, and April 1 from 10:30-11:30 am with approximately 60 participants. Each session covered the same material. A slide presentation was delivered by the Mayors of both Black Diamond and Turner Valley, overviewing amalgamation background, process, progress to date and next steps. Participant questions and comments were provided through chat. The events were moderated and where able, questions were answered by the Town Mayors and CAOs. Questions that were not able to be answered at this point in the process, were also collected and were included in the FAQ (found on both Town websites), as appropriate. All input was reviewed for top themes and listed verbatim on the following pages.

For those unable to attend the public meetings held on March 30th and April 1st, the presentation slides are included in **Appendix 1**. You can also view the live recording of the presentation (roughly 20 minutes in length), [HERE](#).

Survey:

In addition to a general Q&A in the public events, three questions were posed to the participants to provide responses to in the chat:

1. What is your greatest concern around amalgamation?
2. What is your greatest hope with amalgamation?
3. What do you want to know more about through this amalgamation process?

The survey was posted on both Town's websites the day after the public events and was open for 10 days. Roughly 180 people participated in the survey, and in most cases, generated around 250 responses for each question. This input was also reviewed for top themes and listed verbatim in the following pages.

Website:

All amalgamation related questions were requested to be submitted through the Town websites. Email submissions through town websites were collected throughout the negotiation progress until August 6, 2021, for inclusion in this report.* In total, 32 emails have been received. Where possible, responses were provided to the sender. Questions were themed, and responses provided through the FAQ, also found on both Town websites. Email questions and comments are included below and are also themed for most frequently submitted questions/ comments, as well as provided verbatim.

Note: Additional responses received after the August 6, 2021 deadline are included in **Appendix 4.*

Engagement Activities

Two public engagement activities were completed in May and June 2021 for the community to have direct input on the outcomes of:

- Whether a ward or 'at-large' general election system is preferred, and;
- The proposed Municipality's new name.

Engagement Activity #1

The focus for the first engagement activity was:

To gather direct community feedback on electoral representation

The public had direct input on the voting system preferred for the amalgamated municipality's 2022 and future elections. Community members were provided an information sheet on 'Election at Large' or 'Ward Representation' and asked to indicate their preference in an online survey format available on both Black Diamond and Turner Valley town websites. The Ward Exercise Fact Sheet is provided in **Appendix 2**. Results of the survey were presented for consideration by JFAC in preparing recommendations on amalgamation.

Survey:

The Ward Activity was delivered in online survey format and asked the following questions:

1. **If Black Diamond and Turner Valley unite under an amalgamation, what election format do you prefer?**
 - At Large Representation
 - Ward Representation
 - I don't know
2. **If you chose ward representation, do you want a ward system:**
 - Only for the 2022 election as a transition stage in amalgamation
 - Permanently
 - I don't know

The survey was posted on both Town's websites and was open for 15 days. More than 170 people participated in the survey. Responses and input received in this activity is detailed in the What We Heard section on page 18.

Engagement Activity #2

The focus for the second engagement activity was:

1. **Gathering public suggestions for naming the new amalgamated municipality**
2. **Surveying the public on the new name from shortlist of suggested names**

The Naming Activity was broken up into two phases that were completed between May 19, 2021, and June 20, 2021.

The first phase included the collection of naming suggestions from the public. Community members were asked to email their written name suggestions as well as supporting information such as stories, drawings, or photos to communicate the personal, historic, or cultural significance of their suggestions.

The second phase included the creation of a shortlist of the three most frequently suggested names from Phase I and a public survey asking for participants' preferred name choice from the shortlist. All suggestions and outcomes of the activity are captured in the What We Heard section on page 20 and verbatim submissions along with visual attachments are included on pages 66-83.

Results of the Naming Activity were presented for consideration by JFAC in preparing recommendations on amalgamation.

Phase I - Naming Suggestions:

During the first phase of the Naming Activity, the public was asked to email their written suggestions for naming the new amalgamated municipality. Participants were encouraged to include stories, photos, or drawings to support their submission and communicate the personal or historic significance of the name they chose.

The activity was open for 19 days with late submissions accepted for 3 days after closing. More than 150 people participated, generating over 65 unique names and over 200 name suggestions in total. A shortlist was created from the three most frequently suggested names.

Phase II - Survey:

The second phase of the Naming Activity was delivered in online survey format and asked participants for their preferred name for the new amalgamated municipality from the Phase I shortlist:

- **Town of Diamond Valley**
- **Town of Black Valley**
- **Town of Sheep River**

The survey was posted on both Town's websites and was open for 7 days. More than 1,100 people participated in the survey. This input is detailed in the What We Heard section on page 21.

Additional participant comments and questions were provided in email throughout the duration of the activities. Direct responses were provided to questions where possible and others were included in the FAQ (found on both Town websites). Verbatim responses for the Electoral Ward Activity and Naming Activity are provided on the pages 65-83.

Public Event #2

The focus for the final public event was:

1. Amalgamation process report back (final public meeting)
2. Inform the public on the project background, process, timelines, and progress
3. Provide updates on findings of subcommittees with a focus on engagement and finance
4. Provide overview of outcomes and decisions made by JFAC as well as next steps
5. Answer the public's questions about the amalgamation process

Two times were provided for the online public events on July 22, 2021, from 10:30-11:30 am with approximately 32 participants, and 6:30-7:30 pm with approximately 35 participants. Each session covered the same material. A slide presentation was delivered by the Mayors of both Black Diamond and Turner Valley, overviewing amalgamation background, process, progress and outcomes, and next steps. Participant questions and comments were provided through chat. The events were moderated and where able, questions were answered by the Town Mayors and CAOs. Questions that were not able to be answered at this point in the process, were also collected and included in the FAQ. All input was reviewed for top themes in the What We Heard section on page 24 and listed verbatim on the pages 84-86.

For those unable to attend the public meetings held on July 22nd, the presentation slides were made available on both Town's websites and are included in **Appendix 3**. You can also view the live recording of the morning presentation (roughly 73 minutes in length), [HERE](#) and the evening presentation (roughly 68 minutes in length), [HERE](#). Both recordings include the presentation material as well as question and answer sessions.

Coffee and Conversation with The Joint Friendship Agreement Committee (JFAC)

The JFAC Committee members invited Black Diamond and Turner Valley residents and business owners to an informal, in-person drop-in session on August 11, 2021, from 6:30 to 8:00 pm at the Valley Neighbours Club, 133 Sunset Blvd., in Turner Valley. The focus of the event was to provide opportunity for informal conversation between the public and members of Town Councils on any topic. Some amalgamation related questions were asked, almost all of which were covered in the FAQ. The majority of the questions and comments focused on the logistics of a potential amalgamation, for example, address changes and associated cost to residents, council make up as well as comments around desire not to lose local community names or historical identities

Approximately 20 residents attended the drop-in event, and formal community input was not collected from this session.

WHAT WE HEARD: REPORT #1

While reviewing the public input from the Kick-off public events, online survey, and input submitted through Town websites, three overarching themes emerged:

1. Finance
2. The amalgamation review/negotiation process, and;
3. Post amalgamation scenarios

Most input, regardless of the source, generally related to one of these three categories.

Financial

Across the board, questions and input around finance have been the top theme. Although there is strong concern about limited information being available related to the taxes and costs of the amalgamation process, there is also hope that amalgamation can lead to a decrease in taxes and in cost for municipal services.

The most common comments that offered support for the amalgamation process were related to:

- A hope for decreases in taxes and costs.

The most common areas for concern identified in the feedback related to finance were:

- Significant increase in taxes, which could lead to a higher cost of living.
- Uncertainty of where amalgamation savings would come from.

Amalgamation Process

A number of participants provided comments and feedback related to the amalgamation review, public engagement, and negotiation process. Percentages were not high, but several participants identified that the naming process is important. There were also several participants that provided concerns about the amalgamation not proceeding, while others were hopeful it did not proceed at all.

- The most identified hope around the amalgamation process (specifically engagement here), is that each Town continues to keep their name, and that there is an overall additional 'new' name for the municipality.
- The most identified concerns around amalgamation are preference for it not to happen, and concern over lack of public plebiscite/referendum.

Post Amalgamation Transition

Many participants are highly interested in what the Towns will look like post-amalgamation. There is concern about how Black Diamond and Turner Valley will both be represented equally in one larger Town. Many participants are also hopeful that this process may lead to an increase in service delivery.

The comment that was heard the most in support of the amalgamation was:

- **By amalgamating, the residents can expect better and improved services.**

The main areas for concern relating to the post amalgamation scenarios identified in the feedback were:

- **The two Towns will not unite as hoped and may potentially result in division.**
- **How both Towns will be equally represented in a single municipality.**

WEBSITE FEEDBACK

Participants have been able to provide questions and comments through both the Black Diamond and Turner Valley Town websites. To date, the websites have collectively received 23 submissions. The questions/feedback has been organized into five categorical themes, which reflect the working subcommittee groups: finance, emergency, procedure, public and stakeholder consultation as well as more general questions. The following will highlight the top themes for each of the categories.

Finance

To date, there have been 18 related financial comments provided through the website. The top three themes have been identified as:

Theme	Supporting Question(s)
Cost associated with policing	<ul style="list-style-type: none">• When will the residents of Turner Valley begin to pay for policing?• How much will the police cost the Town's after amalgamation?
Tax savings	<ul style="list-style-type: none">• With the amalgamation presumably there will be cost savings. Will these savings translate to lower property taxes?
Management of existing debt	<ul style="list-style-type: none">• What debt does each municipality bring to the table?• Will the debt be paid for before amalgamation or will the Towns combine the debt with amalgamation?

Emergency

To date, there have been two comments regarding emergency services and the impact the amalgamation could have on them.

Theme	Supporting Question(s)
Police Protection	<ul style="list-style-type: none">• When our community does begin to pay for policing. Will we be guaranteed to receive the same number or more officers on the ground in our community?
Main police station location	<ul style="list-style-type: none">• With the RCMP station in Turner Valley being the main location in Turner Valley, a decision will be made to move it to a more central location if Black Diamond is selected?

Procedure

To date, there have been three comments regarding procedure related topics.

Theme	Supporting Question(s)
Staffing	<ul style="list-style-type: none">• If this amalgamation is approved, what happens to the staff in Turner Valley or Black Diamond as it is obvious that doubling up on staff will have to be reduced?• How many councillors and town employees will be released?
Transparency	<ul style="list-style-type: none">• Will the town councillors or Mayor be more transparent?

Public and Stakeholder Consultation

To date, there have been nine comments provided as it relates to the consultation process of this process. The top two themes have been identified.

Theme	Supporting Question(s)
Referendum, vote, or plebiscite	<ul style="list-style-type: none">• Will there be a referendum to approve or to reject the amalgamation? If not, why not?• What happened to the town voting on this amalgamation?
Naming	<ul style="list-style-type: none">• Each Town keep their respective names and add “in the District of West Foothills”.• Whatever name is selected and approved, will be in what Municipality? Foothills or ??

General

There have been 13 comments that were classified under a general category. The general questions and comments did not relate to the categories that were identified above.

Theme	Supporting Question(s)
Against Amalgamation	<ul style="list-style-type: none">• I don't want to see amalgamation.• I do not approve this effort to amalgamation; it has been tried in the past without success.
Identity	<ul style="list-style-type: none">• I am concerned about how residents of each town will identify where they live.
Postal Addressing	<ul style="list-style-type: none">• What happens to our postal address? Will this be changed?

PUBLIC EVENT #1

There were two sessions for the first Public Event hosted live, and online through Microsoft Teams:

- 1st Session: March 30, 2021 from 6:30 pm to 7:30 pm
- 2nd Session: April 1, 2021 from 10:30 am to 11:30 am
- Participation: more than 130 participants

Due to the nature of hosting public events online, participants were able to provide questions and comments through the chat function. Following the presentation, a moderator provided the Town representatives with the questions.

The feedback identified during the public events is organized into the same five categories used for the Website Feedback above: finance, emergency, procedure, public and stakeholder consultation, and general. The following highlights the top themes that were identified in each category.

Finance

Finance was the top theme of interest throughout the public events. There were over 30 financial related questions and comments provided during the events. Below are the top themes of the financially related questions/comments.

Theme	Supporting Questions/comments
Post amalgamation cost savings	<ul style="list-style-type: none">• If the Towns will not be reducing buildings and upkeep and do not have costs for pretty well... anything, where do the alleged cost savings come from post amalgamation? Does the combined council have any 'numbers' to support the idea that residents will save money as suggested?• How will you figure out cost savings then?
Provincial & Federal funding support	<ul style="list-style-type: none">• Is there any provincial funding available to assist with costs of amalgamation?• What's the difference between a town of 2,500 and a town of 5,000 with respect to Provincial and Federal funding?
Debt absorption	<ul style="list-style-type: none">• What happens to both Towns' debt if not equal, which Town absorbs more debt?• Can you speak to the current level of debt carried by each Town?

Emergency

During the public event, several comments were made relating to emergency, especially regarding policing matters.

Theme	Supporting Questions/comments
Policing	<ul style="list-style-type: none">• Can you clarify how it works with the RCMP? There is a lot of mixed information on this on social media.• How does this process mesh with the current RCMP review / survey of local policing needs?

Procedure

There were several comments relating to procedure topics provided throughout the two public events. The top two themes have been identified as:

Theme	Supporting Questions/comments
Staffing Decision	<ul style="list-style-type: none">• How will we decide about who would continue as CAO?
Election	<ul style="list-style-type: none">• If there is an election slated for Q4 2022, then are you saying the current elections this 4th quarter is not needed?

Public & Stakeholder Consultation

Several participants provided comments relating to the public and stakeholder consultation process. The top two themes have been identified as:

Theme	Supporting Questions/comments
Naming	<ul style="list-style-type: none">• How will naming be determined? By whom? How?• Can we keep the names similar to what Crowsnest Past did, so that we save cost of not having to do address changes, etc.?
Referendum	<ul style="list-style-type: none">• Why was this amalgamation process NOT put to a vote before this all began?

General

Several participants provided comments that have been labelled as more general in nature. These comments have been placed under a general category as they do not correlate with any of the five subcommittee groups above. The top two themes have been identified as:

Theme	Supporting Questions/comments
Amalgamation Town Comparisons	<ul style="list-style-type: none">• Have you examined the municipalities that have de-amalgamated?• Have you looked at other towns that have amalgamated, like Crowsnest Pass?
Addressing	<ul style="list-style-type: none">• Has anyone confirmed with Canada Post that the differing statue would still allow us to keep current addresses?

SURVEY RESULTS

The three questions asked during the Kick-off public events were also asked in an online survey format on both the Black Diamond and Turner Valley websites.

- The survey was open for 10 days
- Participation: more than 178 participants

The participants were asked to provide feedback on three questions:

1. What is your greatest concern around amalgamation?
2. What is your greatest hope with amalgamation?
3. What do you want to know more about through this amalgamation process?

Question #1: Greatest Concern

There were 178 responses to the first question asking participants to identify their greatest concerns to the amalgamation process. From these responses, more than 250 comments were collected and themed. The following will outline what the top concerns are and provide examples of related comments.

Concerns Related to Finance

Fifty percent (50%) of survey comments are concerned about the financial impacts of amalgamation. The top themes that were identified include:

Theme	Supporting Questions/comments
Increases in Taxes	<ul style="list-style-type: none">• That it will cost taxpayers an enormous amount in increases.• Property taxes.• Increased cost of living and increased property taxes when we already pay incredibly high taxes in comparison to other areas. And most people cannot afford cost of living increases especially in today's economy, not now and not in a post COVID economy.
Limited information on cost breakdown	<ul style="list-style-type: none">• No cost breakdown.• This has been really badly planned. Thinking about it for years and still don't know how much it costs, how much we save. Great to think about the future, but we got to survive the next couple of years.

Concerns Related to the Amalgamation Process

Fourteen percent (14%) of the survey comments were concerned about the chosen process to assess amalgamation. The top themes that were identified include:

Theme	Supporting Questions/comments
Amalgamation will not proceed	<ul style="list-style-type: none">• That it won't get accomplished, again.• That it won't happen due to misinformation being spread through unofficial channels.
Lack of referendum	<ul style="list-style-type: none">• That it is being forced upon us, no plebiscite as in past years.• Black Diamond voted NO on the last amalgamation attempt. Another vote is required to gain approval of the electorate.

Concerns Related to Post Amalgamation Transition

Twenty-six percent (26%) of the survey comments were concerned about the effects the amalgamation could have on the two Towns post amalgamation. The top themes that were identified include:

Theme	Supporting Questions/comments
Equal Representation	<ul style="list-style-type: none">• The two Towns will not unite with common goals, and individual priorities may lead to community problems.• That we don't come together as a community quick enough, we need a vision of what we want to be known for.
Reduction in services	<ul style="list-style-type: none">• I do not foresee services improving.• Reduced services.
Loss of identity	<ul style="list-style-type: none">• Loss of town identity.• Losing town name and individual identity, which has not been researched enough.

Question #2: Greatest Hope

There were 176 responses provided from participants around their greatest hope around amalgamation. From the 176 responses, over 250 comments were collected and themed. The following outlines participant's greatest hopes and provides examples of related comments.

Financial Related Hopes

Forty-one percent (41%) of the survey comments are hopeful for financial benefits that could be achieved through the amalgamation. The top two themes that were identified include:

Theme	Supporting Questions/comments
Tax decrease	<ul style="list-style-type: none">• Lower taxes.• Improved services at lower taxes than today as individual communities.
Lower costs & cost savings	<ul style="list-style-type: none">• That our total cost of operations will decrease substantially, which in turn will lower our outrageous property taxes!!• Reduction in overhead costs.

Amalgamation Process Hopes

Thirteen percent (13%) of the survey comments are hopeful that the amalgamation does not take place. The top two themes that were identified include:

Theme	Supporting Questions/comments
Not supporting amalgamation	<ul style="list-style-type: none">• That it doesn't occur.• Wish it would stay separate.
Keeping names	<ul style="list-style-type: none">• To keep the names of towns the same.• If it goes forward the names do NOT change.

Post Amalgamation Hopes

Forty-one percent (41%) of the survey comments are hopeful for a new Town vision, growth. The top three themes that were identified include:

Theme	Supporting Questions/comments
Efficient & better services	<ul style="list-style-type: none">• Efficiency of services.• That we combine services.
Town connection and unity	<ul style="list-style-type: none">• That there will be more feeling of connection between the two towns.• That the two communities truly unite and leverage each other's strengths for the betterment of all. No one wins alone, no one loses alone.
Economic development	<ul style="list-style-type: none">• To create a thriving cohesive community that would benefit from new businesses being established. The vacant lots on Main Street are not conducive to a thriving town.• That both towns will see an increase in commercial businesses and will work with developers to look at the potential of establishing in either one of the towns.

Question #3: Want to Know More About

The final question also had 167 responses and asked participants what more they would like to know about through the amalgamation process. From the responses, more than 230 comments were gathered and themed. The following outlines the top themes and provides examples of related comments.

Want to Know More About: Financials

Thirty-three percent (33%) of the survey comments would like further information on the financials for this process. There are a number of participants that are concerned about spending and costs. The top three themes that were identified include:

Theme	Supporting Questions/comments
How much will this cost?	<ul style="list-style-type: none">• How much is this going to cost?• List all the cost that will increase because of amalgamation.
Tax & cost savings measures	<ul style="list-style-type: none">• Will there be a significant cost reduction to the taxpayers?• Final cost savings.
Financial Impacts	<ul style="list-style-type: none">• The financial impact on both Towns.• I want to know that finances move to the top of the list of important issues.

Want to Know More About: Amalgamation Process

Thirty-four percent (34%) of the survey comments were interested in knowing more about why the amalgamation is being considered and what the pros and cons are to amalgamating. The top three themes that were identified include:

Theme	Supporting Questions/comments
Disclose the pros/benefits and cons	<ul style="list-style-type: none">• We hear about the positives, please also deal with the negatives so people have an informed discussion.• The benefits so don't go through with this and does nothing.
Schedule and timelines	<ul style="list-style-type: none">• How long will it take?• Timeline for changes with dates and milestones.
Reason for amalgamation	<ul style="list-style-type: none">• This has been looked into many times and has not happened for I'm guessing good reason, why all of a sudden is this a must?• Who is the driving force behind it?

Want to Know More About: Post Amalgamation

Thirteen percent (13%) of the survey comments are interested in to knowing more about how the transition will take place and what this means to the staff and services that is currently in place in each Town. The top two themes that were identified include:

Theme	Supporting Questions/comments
Staff sizes	<ul style="list-style-type: none">• Will there be positions in the public works, By-law and parks and rec sectors that can be eliminated? Will the town councils remain separate, or will they become one?• Will town workers keep their jobs (they should)?
Affected services	<ul style="list-style-type: none">• Would like to know which services will/could be affected• Which services will be affected?

WHAT WE HEARD: REPORT #2

Electoral Ward Activity

The Electoral Ward Activity used an online survey format to gain public input on the system of electoral representation preferred for the amalgamated municipality's 2022 and future elections. Community members were provided an information sheet on 'Election at Large' or 'Ward Representation' (included in **Appendix 2**) and asked to indicate their preference.

Survey Results

Questions regarding electoral ward representation were asked in a two-part online survey format on both the Black Diamond and Turner Valley websites.

- The survey was open for 15 days from May 17, 2021, to May 31, 2021
- Participation: more than 170 people participated

* A total of 233 responses were received. To filter for duplicate responses, instances of five or more entries from the same IP address were removed. This resulted in a total of 177 responses.

The participants were asked to select from the following options for electoral representation:

- **At Large Representation**
- **Wards**
- **I don't know**

A secondary question asked participants to specify their preference for type of wards from the following:

- **Transitional Wards**
- **Permanent Wards**

Survey Results - Total

A total of 233 responses were received:

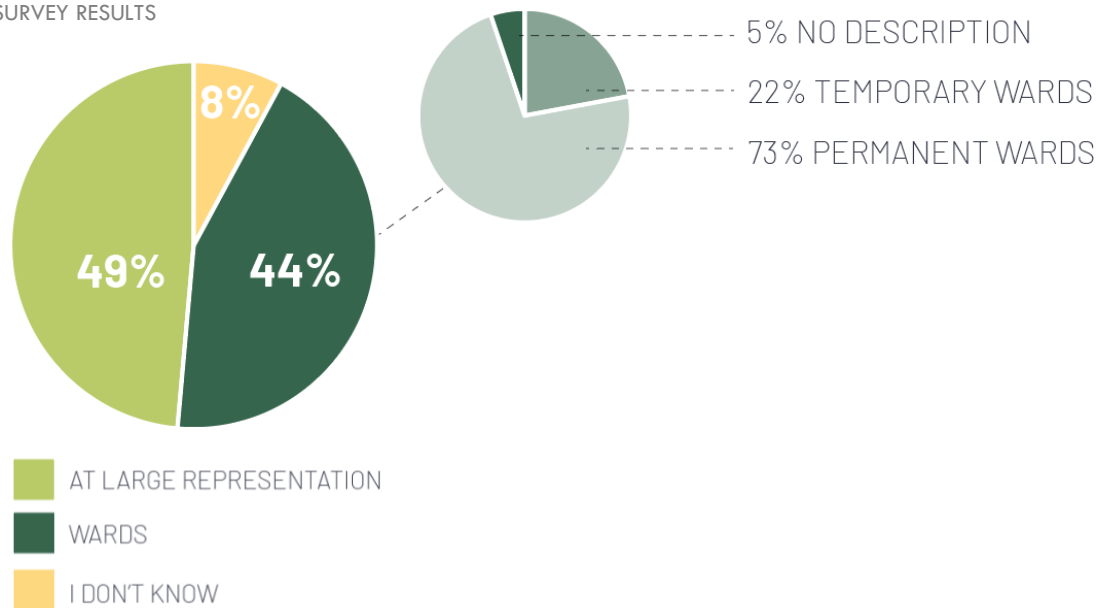
I don't know	At Large Representation	Ward Representation		
6% (14 responses)	52% (122 responses)	42% (97 responses)		
		Second Question – Ward Description (Percentage of responses for Ward Representation)		
		Transitional	Permanent	No description
		23% (22 responses)	72% (72 responses)	5% (5 responses)

Survey Results - Filtered

To control for duplicate responses, instances of five or more entries from the same IP address were removed. This resulted in a total of 177 responses.

I don't know	At Large Representation	Ward Representation		
8% (14 responses)	49% (86 responses)	44% (77 responses)		
		Second Question – Ward Description (Percentage of responses for Ward Representation)		
		Transitional	Permanent	No description
		22% (17 responses)	73% (56 responses)	5% (4 responses)

ELECTORAL WARD ACTIVITY SURVEY RESULTS



WHAT WE DID | ELECTORAL WARD ACTIVITY

The results of the Electoral Ward Activity had a direct impact on the outcome of negotiation topics #4 and #15 in the Amalgamation Negotiation Report to the Minister of Municipal Affairs. Based on public survey response, the Public and Stakeholder Consultation Subcommittee recommended JFAC decide on At-Large Representation for the new amalgamated municipality.

JFAC recommends to the Province that the new amalgamated municipality should have at-large electoral representation and that no review of ward boundaries is required because of this decision.

Phase I of the naming activity called for members of the public to submit name ideas for the proposed amalgamated municipality by written email submission. Participants were encouraged to share stories, photos, or drawings to communicate the personal, historic, or cultural significance of the name they chose.

- ### NAMING ACTIVITY PHASE I
- #### NAMES SIZED BY FREQUENCY OF SUBMISSION



A shortlist of the three most frequent submissions was generated:

- **Town of Diamond Valley (47% of suggestions)**
- **Town of Black Valley (5.4% of suggestions)**
- **Town of Sheep River (4.5% of suggestions)**

Several participants provided comments and feedback related to the naming of the new amalgamated municipality. Generally, these comments served to supplement naming suggestions. Emerging trends were identified:

- The most identified hopes around naming are for the opportunity of the combined name to reflect unique history and regional identity.
- The most identified concerns around naming are over personal expenses and inconvenience of having to change postal address information.
- A number of participants indicated they want to maintain Black Diamond and Turner Valley town names under the new municipality. Approximately 8% of participants suggested retaining existing names under a new name, while approximately 4.5% of participants suggested retaining names without any collective name.
- A number of participants suggested that naming the new municipality with an Indigenous name is an opportunity for reconciliation and consultation with local First Nations.

NAMING ACTIVITY – PHASE II

The shortlist of three names generated in Phase I of the activity was available in an online survey format on both the Black Diamond and Turner Valley websites.

- The survey was open for 7 days from June 14, 2021, to June 20, 2021.
- Participation: more than 1,100 participants*

* A total of 1,697 responses were received. To filter for duplicate responses, instances of five or more entries from the same IP address were removed. This resulted in a total of 1,105 responses.

The participants were asked to choose their preferred name of the new amalgamated municipality from the following three options:

- **Town of Diamond Valley**
- **Town of Black Valley**
- **Town of Sheep River**

Survey Results - Total

A total of 1697 responses were received.

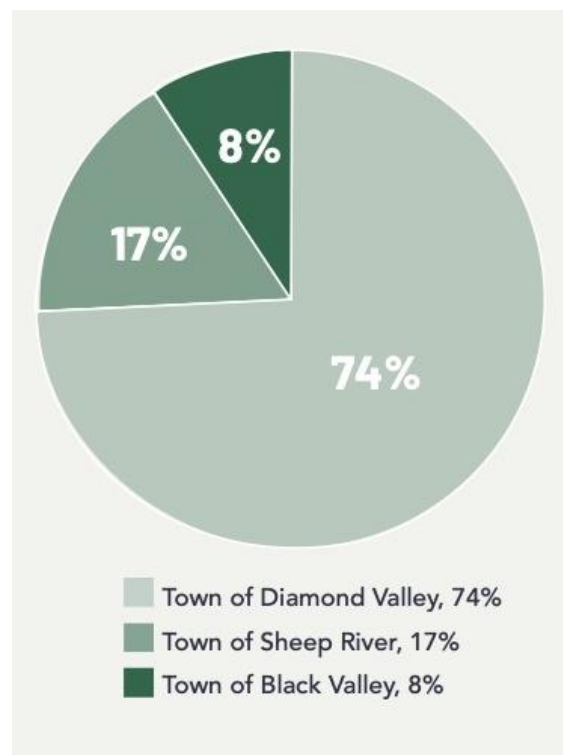
Town of Diamond Valley	Town of Sheep River	Town of Black Valley
57% (972 responses)	23% (389 responses)	20% (336 responses)

Survey Results - Filtered

To control for duplicate responses, instances of five or more entries from the same IP address were removed. This resulted in a total of 1105 responses.

Town of Diamond Valley	Town of Sheep River	Town of Sheep River
74% (822 responses)	17% (191 responses)	8% (92 responses)

NAMING ACTIVITY PHASE II SURVEY RESULTS



WHAT WE DID | NAMING ACTIVITY

The results of the Naming Activity had a direct impact on the outcome of negotiation topic #1 in the Amalgamation Negotiation Report to the Minister of Municipal Affairs. Based on public survey response, the Public and Stakeholder Consultation Subcommittee recommended JFAC decide on the Town of Diamond Valley for the name of the new amalgamated municipality.

JFAC recommends to the Province that the new amalgamated municipality should be named Town of Diamond Valley.

PUBLIC EVENT #2

There were two sessions for the second Public Event hosted live and online through Microsoft Teams:

- 1st Session: July 22, 2021 from 10:30 pm to 11:30 am
- 2nd Session: July 22, 2021 from 6:30 am to 7:30 pm
- Participation: more than 65 participants

Due to the nature of hosting public events online, participants were able to provide questions and comments through the chat function. Following the presentation, a moderator provided the Town representatives with the questions.

The feedback identified during the public events is organized into themes below and all verbatim responses are included in the following pages.

Questions and Comments

Generally, finance was the most prominent theme of interest throughout the events. Below are the top themes based on the questions and comments raised during the Report Back public events.

Theme	Supporting Questions/comments
General Finance	<ul style="list-style-type: none">• Please clarify the JFAC decision that operating revenues continue to support the existing debts of both municipalities before and after amalgamation. Does it mean that debt and operating revenues will be combined – or kept to the individual municipalities as like capital reserves?• Will local improvement levies be the policy of the new municipality?• If not can a net cost/savings projection be done for 3, 5 and 10 years?
Process	<ul style="list-style-type: none">• Does the recommendation to council from the committee have to be unanimous?• If JFAC recommends not to go forward, what happens?
Savings	<ul style="list-style-type: none">• What are the projected tax savings per household?• Will the only reduction in "staffing" costs be the elimination of 7 councillors and one CAO?
Costs	<ul style="list-style-type: none">• What is the approximate cost of holding an election in October and again in November 2022?• It has been stated that upon approval of the amalgamation and through the transition period, there may be other savings recognized. Will the committee recognize that there may also be other costs not yet identified?
Name/Addresses/Licensing	<ul style="list-style-type: none">• How will the name change affect residents address, land titles, etc., and who will pay for these changes?

	<ul style="list-style-type: none"> • Please clarify how the name change will affect our driver's licences...
Deferral to Future Council	<ul style="list-style-type: none"> • Did you say reserves stayed with the taxpayers that gave them? A new council can change this and spend Turner Valley taxpayer reserves on the black diamond side of the river?
Justification for Amalgamation	<ul style="list-style-type: none"> • Why do you think [amalgamation] will pass now compared to previous attempts? • What are the main advantages of amalgamation for residents of TV and BD that are most practically prominent (as opposed to more overarching efficiency advantages at the political and administrative level)?
Other	<ul style="list-style-type: none"> • Neither Black Diamond nor Turner valley have a HR Department. Has administration and Council looked at hiring a HR consulting firm to take staff through next steps? • What would the Turner Valley town office buildings be used for after Jan. 1, 2023? • The in-between land annexed -- any thoughts yet on how this land will be zoned? Parks / residential / commercial? • If we will be required to have additional RCMP, will those officers be dedicated to our community?

VERBATIM RESPONSES

The following verbatim responses are divided into the engagement opportunities: Black Diamond and Turner Valley websites, the comments provided through the Kick-off public event session, survey responses, comments provided during both engagement activities, and comments provided at the Report Back public event sessions. *Note: for the purpose of this report, names posted in the responses are shown as xxxxx.*

Town Websites

Hello, I am asking for a map showing the area of the proposed amalgamation and what land sections are affected, in and around the town. You may send it by email as it is faster and cheaper.
<p>Thanks for the email. In short—</p> <p>This “consultation” feels like a prolonged sales pitch. Instead, where is the vigorous public debate about whether or not this is a good idea?</p> <p>Thus, I would suggest you find people or groups to represent the two—or more—sides of the issue, and then organize a public debate where people can attend. It can be outdoors in the summer if people have pandemic concerns. Then people can really get into it, really get engaged, and really understand what all the amalgamation talk is about.</p> <p>I’m sure many people would be interested in such an effort. Otherwise, it plainly feels like councillors and bureaucrats want this for vague and obscure reasons that haven’t really stood the test of public scrutiny.</p>
Hello, I want to know if a map of the area involved in this amalgamation is available to see, and what it looks like.
Hi I would like to submit the question of how much tax savings will a home valued of \$350000 see after the amalgamation. Thank you
<ol style="list-style-type: none"> 1. If this amalgamation is approved what happens to the staff in Turner Valley or Black Diamond as it is obvious that doubling up on staff will have to be reduced.? 2. I do not approve this effort to amalgamation; it has been tried in the past without success. 3. What happens to our postal address? Will this be changed? 4. With the RCMP station in Turner Valley being the main location in Turner Valley a decision will be made to move it to a more central location if Black Diamond is selected.? 5. As this amalgamation is the emphasis of reducing operating costs of having one area will our taxes be reduced. After all the costs of now only having one location we will only need one mayor and a reduction in city staff therefore operating cost will be reduced. Last Turner Valley staff have been excellent over our 17 years we have lived in TV such as the upkeep of roads, library ect has been outstanding, however BD residence I speak to do not share the same opinion
Just wondering how this affects our mailing addresses. Will we have to change our mailing address to new town name?
<ul style="list-style-type: none"> • Many streets and roads in Black Diamond are unpaved. Will the amalgamation result in additional provincial funding or capital grants to rectify this disgraceful situation? • With the amalgamation presumably, there will be cost savings. Will these savings translate into lower property taxes? • What’s the dollar cost of the amalgamation process? What’s the cost of the consulting group assigned to the amalgamation process? • Will there be a referendum to approve or to reject the amalgamation? If not why not? • What debt does each municipality bring to the table? • Black Diamond had a water leak on 1 Ave adjacent to Ford St. in Jan 2021. The contractor doing the repair indicated this was the fourth or fifth time that they had been called to repair this line in the past few years and didn’t understand why the municipality had not elected to install a section of new water line particularly given

the costs of mob and demob however as long as they (the contractor) were being paid they were happy. This is an example of a hidden debt that can hurt both municipalities coming together. Are the costs of infrastructure replacement adequately addressed in the capital requirements of both municipalities? Is there a plan to upgrade the infrastructure? We understand there are already substantial synergies between our two communities and definitely support the concept of one administration overseeing an amalgamated community provided that the financial burdens of one community don't trigger an additional financial burden on taxpayers who ultimately fund the municipality in whatever form it transitions to.

I am interested in the naming of the new district as a result of an amalgamation of Black diamond and Turner Valley. I am concerned about how residents of each town will identify where they live. I am concerned about the cost of changing each of our names. The cost of updating signs and maps and letterhead for municipalities and businesses and services such as policing, hospital, schools, Canada Post amongst many others not mentioned here. I would like to suggest that it be considered that Turner Valley and Black Diamond continue with their respective names and add "in the District of West Foothills". Somewhat as the towns kept their names in Crowsnest. Perhaps other small nearby communities could be invited to live under such a District umbrella. Perhaps this has been considered. I would very much be interested to hear any plans about this issue. Thank you for considering my thoughts.

Hello, I may be a little bit early on in the amalgamation talks to be asking these questions about the Community Policing Grant.

1. When will the residents of Turner Valley begin to pay for policing?
2. How much do you foresee Turner Valley residents paying for policing?
3. When our community does begin to pay for policing. Will we be guaranteed to receive the same number or more officers on the ground in our community?
4. How much do you expect to receive from the Municipal Policing Assistance Grant? Is the grant based on population? Or percentage? Thank you for taking the time to respond to my email. Regards,

Good Afternoon, I hope to attend the Thursday April 01 meeting, but pending job activities may not be able to do so. In that event, I have 1 main concern/inquiry I hope is being or has been addressed. My only request is that, with the amalgamation, town expansion does not allow for the construction of new facilities/buildings/roadways over any old wells. A large part of my previous work position involved abandoning, and re-accessing already abandoned wells. Knowing this is a common issue around Stettler, Medicine Hat, and Leduc – I do not want to see this or have this happen to either Black Diamond or Turner Vally. Personally, I don't want to see amalgamation. I enjoy the town separation. Regardless of whether it happens or not however, I see the expansion of both towns and hope this issue will be or has been addressed prior to expansion and construction of future developments. Knowing well integrity in the area, and knowing that Cougars (old bar) back alley parking lot is already laying over 2 (or more) issue wells, I can see this is already and may remain an issue. My concern stems from 3 areas. A). My career was built on old problematic wells, abandoning wells and re-accessing due to surface casing vent flow and gas migration. Though I enjoy employment and enjoy this type of work, if I can help prevent it – this appears to be my main option. B). Many new generation folk, old as well but particularly new/young; do not realize O&G operations. It would be terrible to purchase and support a house or land development that may exist above already abandoned wells, and having issues down the road. C). As a Turner Valley house owner, there are abandoned lines that were never removed – even in my own back yard (literally). This has provided significant concern for future development of my own property with regards to fence building and possible down the road garage repairs/development. Thank you for providing the opportunity to address my concerns.

I am wondering if we could re visit the animal bylaw in regards to how many pets you can have! Calgary for example doesn't have a limit on how many animals you can have because they base their bylaw on the responsibility of the owner rather than the number of animals. You can have one dog owner who has one dog who doesn't clean up the yard, lets the dog bark all day, leaves it outside etc. Then you can have someone like

myself that has 4 dogs that never allows the dogs to bark, cleans up the yard, licences the dogs. My dogs are my kids and I don't appreciate being told how many I can have. This does not prevent hoarding as hoarding is a mental health concern and hoarders will hoard animals regardless of the bylaws. All that you are doing by putting a limit on animals is not allowing responsible dog owners to be honest. My dogs are rescue dogs and I would like to rescue more. This rule is actually going to force me to move from a town I love because I want to adopt more dogs. My dogs are healthy, they have the absolute best lives filled with adventures and they live better than most humans. I don't think it's fair that you can tell me how many family members I'm allowed. What about the annoying people that have 7 kids that run around screaming all day? How is that allowed but I can't have well behaved dogs. I propose that you get rid of this ridiculous rule and allow people to be honest and licence all their animals. It will make the town more money and will allow people to be honest. Basing the rules on the number of animals rather than the ability of the owner to be responsible just doesn't work. Deal with people on an individual basis, if you get a complaint deal with it accordingly. Don't group slap responsible people it just simply makes no sense. Black diamond has a 3 pet rule and turner valley has a 4 pet rule. The amalgamation is the perfect time to ditch this old school rule.

Howdy – Thanks for the engagement session link. Is there a place to see posted amalgamation questions? I wanted to submit but also avoid redundancy.

Please advise if a new name has been determined for the combined towns of Turner Vally and Black Diamond. Whatever name is selected and approved will be in what Municipality? Foothills or ?? Please advise as soon as possible.

Good afternoon, I have a few questions for the public meeting tonight: Which town has the major debt? Will the debt be paid for before amalgamation or will the towns combine the debt with amalgamation? How much will our taxes be raised? How much will the police cost the Town's after amalgamation? How many councilors and town employees will be released? Will releasing councilors and employees pay sufficient to hire more Peace Officers so we can have the night shift covered? Will the town councilors and Mayor be more transparency? Why was there not vote on this amalgamation? Amalgamation has been voted on multiple times over the last number of years. What happed to the town voting on this amalgamation?

The last plebiscite showed the Town of Black Diamond to be solidly against amalgamation. Why did 7 elected officials decide to start this process on their own instead of putting it out to the populace? I believe the people should have been consulted. With an election this year it is a minor expense to add this to the ballot compared to the expense of the consulting fees being spent now. And remember, the 'grants' you receive are also paid from taxpayer dollars.

Good morning. After re-listening to the Amalgamation webinar recently held in late March I have to ask: Why is it that the Towns have not sought an exemption to the October 2021 municipal elections given that for consistency and efficiency of this process keeping the current Mayors and Council in office makes much more practical sense? As advised, the next election, if amalgamation proceeds, would be held Q4 2022. If amalgamation does not proceed what is preventing an election to still be held Q4 2022, given these extenuating and unique circumstances? From what I can gather the only shortcoming would be that Elected officers would only hold office for 3 years rather than for the 4-year election cycle. I'm not understanding the thought process or reasoning around changing "the crew mid-voyage". It seems fairly evident that the process will be loosing valuable insight and will be creating unnecessary inefficiencies and a duplication of efforts having to onboard and orientate new Councilors. Appreciate the insight into why this impractical decision has been made. Sincerely,

Below are my questions and comments regarding the subject matter. 1. Has the amalgamation committee set defined targets or measures to determine if amalgamation is a good decision for both communities? I'm aware of the five shared objectives, but how do we know if those shared objectives are, or ever will be, met? Deciding

factors should be clear and easy to measure to ensure the best decision to amalgamate (or not) is made. Once the deciding factors are in place, they should be shared with the community. 2. It's very concerning costs are not even mentioned. How can you have a resilient and sustainable community without knowing the costs to amalgamate and the costs after amalgamation? Is money no object? Is there no respect for taxpayer dollars? 3. I do not want to see amalgamation move forward without knowing the costs. Costs should be addressed sooner than later and costs should be one of the top determining factors on whether to proceed with amalgamation. If it's not affordable it should not be contemplated. 4. Why was it decided there would be one mayor and six councillors? Why not one mayor and four councillors? 5. Were costs to hold an election discussed? Did the committee consider seeking permission from the Province to delay elections until after the amalgamation decision (thus holding one election instead of two)? If not, why not? Again, costs should be at the forefront of this exercise. 6. Will the results of the three relevant amalgamation questions be posted? If so, when will the results be available?

Why is there no option with the survey questions to refuse amalgamation?
I do not want to amalgamate for the following:

1. Our taxes will increase (due to Turner Valley's lack of increases)
2. We are being forced to grow our community already - this will accelerate it
3. Will lose our small-town flavor (which is already happening, but this will also accelerator)
4. The **lack of acknowledgment and respect** from the town to accept what the citizens have expressed - repeatedly - we do not want to amalgamate! We are being FORCED to do this.
5. Money is the driving factor - not the quality of life for the citizens
6. The towns can't take care of what they have and live within their means now - this will only make it worse.

If we as citizens of black diamond had a vote on this, I would agree with whatever the outcome was. But after two votes that did not turn out as someone wanted them to, they decided that they know best for us. It feels like the Quebec vote to separate. They keep having the vote till the outcome is to their liking. I love Black Diamond and I do not know and care the reasonings for amalgamation, but I do care for democracy and the citizens should have the right to vote on this very important issue. I know that this will not change a thing, but I do know a lot of people feel the same as I do.

Councillors;
Some questions below:

1. Just over a decade ago, residents of Black Diamond voted overwhelmingly in a plebiscite against amalgamation. What causes you to think that this is no longer a settled question in the minds of Black Diamond voters?
2. Is the impetus to amalgamation driven by a belief that the combined community will receive greater subsidies from the provincial government than the two smaller communities presently receive separately? If so, what causes you to believe this?
3. It is claimed by amalgamation supporters that the towns will need less capital equipment than the two towns need now. I think this is arrant nonsense. If you use one piece of equipment and work it twice as hard, it will have half the life of two pieces of equipment worked half as hard as one. Where am I wrong in this analysis? If I'm not wrong, then you must admit that there will be no net savings in equipment.
4. How much higher will staff costs be in the first year after amalgamation? I refer particularly to laborer and less than senior staff.
5. Will senior staff and councillors of the amalgamated community be entitled to higher pay as a result of being in charge of a larger community?
6. Have you prepared a tentative organizational chart of the new town's bureaucracy? If so, will you share it?

7. What is it about one big government that makes the community more attractive to business than two smaller governments that might compete for business?
8. Will additional committees of council be created as a result of amalgamation?
9. Did the JFAC consult with any subject matter experts on the matter of amalgamation, or review any academic studies of amalgamations before it sent in the letter of intent to the Minister? If so, who were they, and/or what were the studies? Is it possible to summaries the advice received?
10. How many meetings and workshops have the JFAC had since January 2020?
11. Where do you think there will be additional costs as a result of amalgamation? I understand the JFAC believes there will be net savings of \$400,000, but this is a result of summing the pluses and minuses. Where do you expect there will be pluses?

Hey, I'm wondering if it's possible to vote or have any say towards this proposal. Thank you

I do realize that a number of my questions cannot be answered factually at present as the event has yet to happen, and that some decisions can only be made by the new council, but they are nevertheless food for thought and should be taken into consideration. I also feel strongly that if both Council are performing due diligence, and that the Finance Subcommittee is able to get through the mountain of tasks set before them, there will be, at the very least, partial answers. So far I have found no factual benefits for Black Diamond. Amalgamating is a big step, and I want to understand. If there are tangible benefits to our communities. The friendship agreement took care of many redundancies that amalgamation would have, so I don't see the point, nor and benefits.

1. In the amalgamation kick off survey, why was the question: "Do you want to amalgamate" not asked?
2. Has a review been completed of service level of staff? What was the cost and findings?
 - a. Number of staff
 - b. same amount of work, initially more
 - c. Salary - will the higher present salaries be matched
 - d. salaries historically increase with population size
 - e. Severance costs - honoring contracts
 - f. Costs to keep all staffing in place until the future council decides otherwise?
3. Has a review been completed of equipment/facilities? What was the cost and findings?
 - a. The towns are growing not shrinking = more costs
4. Why is so much time spent in closed chambers if the Councils are dedicated to transparency throughout the review process?
5. When will the amalgamation cost review be presented to the public?
6. Is there funding for the local business for costs incurred?
7. Debt between towns is considerably different - how would this be managed?
 - a. <https://turnervalley.ca/wp-content/uploads/2021/04/2020-Audited-Financial-Statements.pdf>
 - b. <http://www.town.blackdiamond.ab.ca/DocumentCenter/View/3525/2020-Black-Diamond-Consolidated-Financial-Statement-Signed>
8. What is the financial substantiation for amalgamation?
 - a. Supporting facts on cost savings
 - b. Substantiated financial reasons
9. Keeping in mind that grants are not guaranteed, which grants will be available to a larger town? What is the offset from what is available at present?
10. It has been said that a unified voice is stronger, can you please explain how a smaller representative base will have more clout.
11. What have the costs been for the amalgamation to date?
12. TAXES
 - a. What is the anticipated increase to

13. cover costs of amalgamation not covered by possible grants

- a. prior debt
- b. This will happen regardless of amalgamation or not. What is the anticipated cost for the required updates to the collective sewage treatment plant? How will this be distributed among tax payers?

I look forward to your responses.

Hello,

I have questions about the amalgamation and how it would effect the current town names and future mailing address.

Is there someone who could inform me about this issue?

What is the advantage in this proposal?

Will the additional RCMP officers paid by diamond valley taxpayers be dedicated to serving our community or will they added to the pool for the area?

If the towns amalgamate, will we be responsible for the cost of the RCMP , or will the Province be picking up the cost?

Good day Minister,

I am writing to express my concerns over the 'Proposed' amalgamation of the towns, Turner Valley and Black Diamond.

I have been a long-time resident and have witnessed several changes and decisions for our area, some good, and some bad, which puts me on the fence about this coming one.

The way it is being 'forced' on us is very suspect. The mandate of JFAC (Joint Friendship Agreement Committee) is the intent to amalgamate so how can they be unbiased?

Please view the meetings, (they are all online at YouTube, Turner Valley), and agendas and minutes on both town websites, you will see that majority of council is more concerned over ticking off the boxes for the application than presenting information for making the decision whether to go forward or not.

The financial statement – I do not want to negate the hard work that went into it, is only for information purposes and to compare the towns. The imagined cost savings can only be decided by the newly elected council. Except for 3 areas; the removal of one CAO, but nowhere is the cost of severance factored in (industry standard dictates to be between 8 to 12 months of salary), the reduction in RCMP costs, and the reduction in one set of council members. So, in my mind – cost savings is not the reason.

It appears to me that the committee has only done the bare minimum as outlined in the application document to "get 'er done" as one member keeps expressing. Which I can appreciate as it is a daunting process – but what has been done appears filtered. For example, the opening survey only asked questions that put amalgamation forward, and the survey for the method of voting had an alarmingly low participation – out of approximately 5000 residents, only 177 responded (with COVID-19 restrictions this was difficult to get out to the community, but with such an important issue I believe more should have been done). Now as it stands – the vote is "at large" so the possibility of a stacked council is very real – can a new council change this?

I believe the only real reason is for development and shared revenue to save Turner Valley. Turner Valley is in dire need of profitable development, whereas Black Diamond is far more attractive to investors because of what it already has. With amalgamation, developers will be encouraged to consider the TV area and possibly given incentives to do so. Which I feel is a reasonable assumption on my part and will most likely initially incur costs.

Historically amalgamations cost taxpayers, how much depends on how responsible the new council will be. With that I have my doubts if the council is stacked.

I feel manipulated by this process. I would like councils to come out and voice the true reasons for their push on this. Basically, I would really appreciate honesty. Black Diamond and Turner Valley already share so much that amalgamation does not matter to Black Diamond. But for Turner Valley it could be their saving grace. Perhaps if the focus all along had been on a platform such as 'together we can be better', or even 'for the good of all' rather than trying to dupe citizens into thinking that it will be a cost saver, they would be able to have folks on board, myself included. As it is now, I am leaning towards 'NO' to amalgamation.

Best Regards,

XXXXX

Black Diamond, Alberta

Good evening,

Regarding amalgamation, please see the following questions:

1) Upon amalgamation residents will be forced to obtain a new property report, as well as register with Alberta Land Surveys as the legal land description has changed. Who is paying for this?

2) Will the new municipality compensate residents for costs incurred regarding address changes eg. drivers license, post office, passport, all financial lenders, CRA or any and all provincial and federal required departments?

3) Will all provincial and federal government departments be automatically aware of our change of address?

4) Will all the bylaws for Black Diamond and Turner Valley stay the same or will they merge and be applicable?

5) Prior to commitment of the application, will the residents of the communities, as a whole, be given any further opportunity to discuss at an open forum with councils?

Looking forward to the meeting,

XXXXX

How will you insure that upgrades like paving, pathways, and infrastructure are distributed equally between the two towns? Eg will Turner Valley see a decrease in road upgrades/maintenance while waiting for Black Diamond roads to be paved?

Question

I have great difficulty with the Town Councils making the final decision on amalgamation in September 2021.

How can anyone of the current Town Council Members vote in favour of Amalgamation, and take themselves out of a well-paid job?

It is my believe that serious conflict of interest exists with the final decision.

God Bless

XXXXX

I just attended the July 22 Amalgamation Report Back online meeting and it appeared that contrary to what I was lead to believe (Black Diamond and Turner Valley post offices would remain and mailing addresses would stay the same), we will have a new mailing address (Diamond Valley) that will require an address change on each individuals part. The presenters addressed the drivers license address change and the fact that you only have 14 days to change your address which they are trying to negotiate. I personally moved to Turner Valley in Sept 2020 and the change of address process was extremely frustrating and I had a couple services that took 8 months to get it right. My experience was that it was next to impossible to speak with a real human being at many businesses I needed to change my address with and they directed you to do it online. I assumed that doing it online produced a change of address with the entire company but my experience was that there may be many divisions within a company and the address didn't get changed at all of them (ie my bank). I went through the Canada Post Mail Forwarding but that process also caused some grief and there was a cost. **Who will pick up the cost of mail forwarding?** I was hoping that I wouldn't have to go through an address change again but it appears that I will if amalgamation goes through. **Can you confirm that residents will have to do an address change after amalgamation?**

I want to know who is going to pay for all us to change our driver licences and other information for the government. ???

What will be the postal code. ??? Or will we keep the two. ???

How high will the taxies go???

Will it be one mayor.???

How many councillor will there be??

Why Even do this ???

Public Event #1 Comments: March 30 & April 1, 2021

Questions:

What happens to questions in emails??
How does this amalgamation initiative mesh with the Calgary Metropolitan Region Board planning process?
If amalgamated would the new entity be eligible to apply to join the CRP?
If we amalgamate with one mayor and one council how many will be on council?
Since the council will have more residents to tend to how much more will their alary be?
what initiatives have been "stalled" due to amalgamation talks?
will there be taking over some the the foothills county?

How does this process mesh with current RCMP review / survey of local policing needs?
Will one of the existing town hall buildings be sufficient to house the amalgamated towns needs? will a new building be needed? How much will this new building cost?
Is Provincial Govt "pushing" for more amalgamations?
How will naming be determined? By who? How?
Names can be kept. BD and TV... new corporation could be a number only but I would like to see "Diamond Valley" as name as many businesses use this.
I heard the word "Potential" Amalgamation. Can you confirm the statement meaning?
will each town be responsible for setting their own mill rates?
Should the objectives also include a goal to reduce administration and operations costs?
Why was this 'amalgamation process NOT put to a vote before this all began
What are the costs of new signage/letterhead/decals etc. ? Since the councils have stated that saving money is the main reason to amalgamated they have these numbers ready I'm sure
If there is an election slated in Q4 2022 then are you saying the current elections this 4th Q is not needed?
Wouldnt 4th Q be new council if amalgamation is done?
TV has half of Dunham Lane would there be interest in taking all of it?
will each town set their own mill rates?
Will the towns be able to retain their names and adresses etc and only the municipality name changes?
How will you figure out cost savings then?
What happens to both towns debt if not equal, which town absorbs more debt?
before naming occurs should amalgamation be solidified?
If the towns will not be reducing buildings and upkeep and do not have costs for pretty well....anything, where do the alleged cost savings come from post amalgamation? Does the combine council have any "numbers" to support the idea that residents will save money as suggested ?
Has Black Diamond annexed the land in between the two towns on both sides of the highway along Hwy 7? Does the annexation create a thick band of land between the two towns in this corridor?
Will the towns provide a unified report that will cover all of the financial information pros and cons of amagamation to the residents of the towns to review? And if so when could this be made available?

in this bigger town are there still a will to have small lots for residences
Do we want to go big?
Economic development? We're limited by water. And by distance.
To move from 2 small govermnt monopolies to one large monopoly. There is good economics in this?
are subcommittee members both elected officials and town residents?
Has the expense of removing officers from each town been included in the expense of amalgamation?
Considering the many struggles that people have had and are having due to COVID, has there been research into how amalgamation will help or hinder the work of FCSS in helping those who have various mental, emotional, and/or financial needs?
Will both town residents get to vote on whether or not we proceed with the application and move forward with amalgamation or is it just the town councils that will be voting to proceed or not?
What are you eliminating to save funds and make this worthwhile?
Have you examined the municipalities that have de-amalgamated? There are many.
What will be the cost of re-branding?
How does a member of the public get involved in a commitee?
What infrastructure projects have to be undertaken to make both towns on equal footing?
Balancing debt levels between communities?
How will we decide about who would continue as CAO?
Cost of a council is minimal compared to all other costs. Due to the river Emergency services are still required on both sides Still see no financial benefits?
Can the towns provide residents with a possible post amalgamation model from historical information without a costly consultation process?
Can you clarify how it works with the RCMP/lots of mixed information on this on social media.
So, hwere are the cost saving?
Do you feel that an amalgamated municiplaity would benefit by being able to attract funding and grants and business not currently available due to limited populations for each?
What's the difference between a town of 2500 and a town of 5000 with respect to Provincial and Federal funding?

What about the bylaws officers? Will they be eliminated?
Can you speak to the current level of debt carried by each town and the level of proposed infrastructure costs for each municipality?
Can the towns offer up a post amalgamation model from historical information and town financials without a costly consultation effort.
Is there any provincial funding available to assist with costs of amalgamation?
Turner Valley's history has been written up in literally thousands of scholarly articles and academic textbooks over a period of tens of decades. It is connected to the history of provincial financial regulations, health and safety regulations, land and mineral ownership regulations, and more. Petroleum engineers, geologists, and many other professionals and academics know about Turner Valley. Do modern locals recognize this notoriety? Will TV lose its provincially distinctive history, industry specific history? History is a part of culture, will TV lose its own culture? Turner Valley history is still within the memories of living men. Do locals know, respect and value this? Will the towns' individual histories and culture become muddled in the sharing of modern interests? Is Turner Valley willing to lose its famous name? Think about the pyramids of Giza being encroached upon by urban expansion of Cairo. Will this modern idea of amalgamation cause the loss of individuality and historic significance?
It appears both towns have an amalgamation website within their town website. Is there a joint website that represents both towns?
Crowsnest status is a Municipality. Our amalgamated town would have the status of a Town. Has anyone confirmed with Canada Post that the differing status would still allow us to keep current addresses?
Any chance the provincial government may cut your expected funding due to its diminishing bank balance?
can we keep the names similar to what crowsnest pass did, so that we save cost of not having to do address changes etc?

Comments that were provided:

I do not understand, why we would want to amalgamate if we do not know what the financial benefits will be. This could make things a lot more expensive. This should be the number one question. I feel you should a good idea about this.
My greatest hope is that we all, both towns, work together for a better future through amalgamation. We ARE neighbors. There IS strength in numbers.
I understood that the decision was made and that the excercise here was how to make it happen
Agreed, they have already made the decision
My prefernce is for non-ward representation but I understand that decision is in the future

So what are the mayors saying here?
I believe both Councils and Admin continue to work on financial efficiencies in many ways.
IMO reduction of costs would undoubtedly occur naturally given reducing redundancies and having economies of scale.
Other amalgamations Towns have kept their names, take a look at Crowsnest?
I know but the audience may not be aware of this and clarification might be needed.
Cheers to that - you've been transparent and upfront about information. Well done
FAQ's on websites #4 has information on pre and post RCMP, policing costs.
Good question ^
Agreed. Staffing is the majority of each town's budget and should be addressed before amalgamation.
Agreed
Thanks mayors and CAOs for a good discussion.
I like it because it is small town... just saying! Might be others with the same feeling.
Thank you for all the hard work you all have put into this process!
Thanks everyone.
Thanks to everyone hosting. Appreciate your time
We have heard repeatedly that cost savings was the reason to amalgamate. In order to come to this conclusion someone at some point must have pulled out a calculator, so SHOW US THE NUMBERS!!!
You do know that Black Diamond residents have voted this down at least twice. Again, 1 council is important.. the way it's been presented before is that we'd keep 2 councils. Doesn't make sense at all.
I don't seem to have the ability to ask questions?
Distance from markets and sources of supply
"Greatest Concern: that the cost of amalgamation will increase taxes for town residents despite our taxes already being higher than many other areas. It would be great if the Finance subcommittee share the Financial Business Case and make it available to the public, for full transparency. This will give residents an opportunity to review proposed costs/benefits. And for us to be able to see what money goes where, and where the potential savings/efficiency are Greatest hope: would be increased efficiency both in operations and in cost savings, and FULL Transparency of financial cost/benefit analysis. As I am not sure many in our communities could afford significant increase in tax base, especially given current economic conditions in both a covid and post covid

environment Would like to know more about: the financial business case showing the costs/benefit analysis of whether or not to move forward with amalgamation for our towns"
"No, this is council members and administration of each town I expect there would be people being removed from office. This is an HR type question. Thank you "
Eliminating 7 elected officials and a CAO under Amalgamation is an expense reduction!
It costs about 180,000 per year to pay a constable with overhead.
You'll save no money creating your own police department.
assumption: that we would not reduce our service level from current levels regarding (policing/peace officers)
so then are we looking at doing something similar to Crowsnest Pass, keeping our names and post offices etc
More of a snapshot of the how blended services would look like as well as council and administrations. People are lookingmg to see what it might look like from a 100 foot level.
To make a more efficient debating club.

Public Event #1 Survey Verbatim Responses

What is your greatest concern around amalgamation?

Total Responses = 178

The location of town office.
Tax increases, water fees etc. Basically more money out of my pocket.
1. Not being transparent in the process 2. Defining the competitive advantage of either town 3. Equality in equity of each town
How much is this costing us
Costs - water, sewer, garbage etc.? Taxes?
No cost breakdown
The two towns will not unite with common goals, and individual priorities may lead to community problems.
The fact that there will be an election in October and then another one very soon after if amalgamation is achieved. Towns could end up with little knowledge, continuity and steep learning curve if there are many new Councillors this October. And there will be a needless cost with two elections close to each other. This could have been alleviated by either getting amalgamation done sooner or allowing present Councils to sit until process is complete and then having an election for one combined Council.

That the staff of either town will be given clear direction as to their future with the new municipality. They should be given the choice to stay and train for a new position or be supported in taking over a lead position but that it be clear communication from Admin as to the positions that need to be filled and a shift in transition.
Turner Valley side will lose more businesses.
Tax increases
That it will not happen as well as the delays in the amalgamation!
population growth. Already losing small town feeling with the "city mentality" new comers. Increase in fast food places etc taking away from mom and pop business
That the culture will not shift to 'one team' and instead become an us vs them mentality and nothing will get accomplished.
Takes a long time and the province has no money so high probability they will reject the amalgamation.
That the Black Diamond council and mayor will try to stop the amalgamation.
That it is being forced upon us, no plebiscite as in past years.
I have none
Taxes being raised from the unbelievable amount they are now
Nobody is so dumb they starts something like this if you don't know how much it cost or how much money you have. I'm afraid that you aren't telling us because you want to do it and my taxes will go WAY up.
I do not really have any concerns.
Road work / snow removal
Higher Taxes
nothing will change and it will cost more.
Their BD's snow clearing is atrocious. I am concerned about the big money we paid for our new grader and snowblower and don't want to lose it.
That property taxes will rise again and services will be less. Taxes on water sewer will rise again and again. At what point do you think taxpayers have had enough.
The wasted time and resources if it falls through.
Water supply and sewer upgrades regarding potential growth of the two towns.
The cost .. I don't believe we are going to save any dollars

That it has been really badly planned. Thinking about it for years and still don't know how much it costs, how much we save. Great to think about the future, but we got to survive the next couple years.
That it won't happen.
That it won't get accomplished, again.
How managerial & staff positions be determined between the 2 existing staff
Optics. I think that Black Diamond has done a great job of maintaining their businesses, tourism, etc. Turner Valley is a ghost town with a sparse main street that I'd hate to have associated with the area.
raised taxes
How to deal with those with animosity towards the amalgamation.
Uninformed options, keep true facts coming
Clarity of benefit by specific example as opposed to broad motherhood statements...ie., provincial grant benefit as amalgamated municipalities versus partnership grant benefit as two separate municipalities in a partner agreement?
That it's affordable
Taxation. I pay more taxes on my 2 bed bungalow in turner than my mother in law pays for her 5 bed triple detached garage corner lot in McKenzie Towne Calgary. Time to lower the taxes cause this town doesn't provide the amenities to justify this madness. You know you have a problem when NENSHI taxes less than you do.
That we don't come together as a community quick enough, we need a vision of what we want to be know for . Like the Great out doors. So building our community spirit is important
That it solves nothing. Our taxes won't go down, if anything they'll probably go up. What will it cost the residents?
Taxes
Cost to taxpayers
Renaming towns!!!
too much staffing in town office, need to downsize
None
I have no concern with amalgamating; however I do have a concern that taxes will increase along with water and sewer charges and other than having only one 7 member council, the number of staff will not decline, but increase. I do not foresee services improving.

Getting rid of one of the schools
Taxes
Taxes
Costs involved.
The taxes should be a major focal point during this process but I feel like council is shrugging it off as something that we will figure out later. The towns people are not your ATM'S So in saying that, simple question are taxes going up or down??? I truly hope that you have a budget figured out by now as well.... at least a ball park
Loss of town identity
Is taking on the costs of repairing roads and pipelines In Black Diamond
Water rates
Additional costs for the community leading an increase in taxes. Disproportionate differences in tax structures leading to one community paying more than the other for similar properties based on historical tax needs.
Increased costs, absorbing TV debt.
That the staff of either town will be given clear direction as to their future with the new municipality. They should be given the choice to stay and train for a new position or be supported in taking over a lead position but that it be clear communication from Admin as to the positions that need to be filled and a shift in transition.
No concerns
Increases in costs and red tape.
Increased costs and taxes.
Black Diamond voted NO on the last amalgamation attempt. Another vote is required to gain approval of the electorate.
Cost
Increased taxes
Not looking to amalgamate services properly
Towns will not be equally represented on council.
Potential job loss for town employees.

Don't have one.
- proposed shared services become basis for in-fighting rather than benefits for residents - duplicative services for quite some time because proposed changes and integrations won't truly be initiated and / or completed
Increased taxes. Increased town bill. Increased water bill.
increased taxes
Raising taxes
Higher taxes.
Nothing! Let's do it
Don't think I have any
That it will cost more than it will allegedly save. It is concerning that there have been no solid financial data presented as yet.
Taxes going up
Tax increase
Higher taxes
Redundant costs and taxes.
Taxes, funding for infrastructure.
More taxes
My greatest concern is that the status quo is the outcome.
Once the amalgamation happens, that decisions will be based on what is best for both towns and not get caught up in us/them scenarios. Equal representation.
Higher taxes and less provincial funding
Costs associated with the amalgamation and rebranding
Not concerned, go for it.
One town being left in the past
I have none, it has been discussed for 30 years, about time the Hatfield vs McCoy attitude fades away.
Cost

Increased costs
Lack of experience and ability by council and town staff to effectively and efficiently accomplish this task.
No efficiencies realized and delivered
There will be no tax savings.
Taxes! They are too high in Turner Valley and we can save SO much money between the two towns by cutting double spending!
Higher property taxes and loss of services
Nothing. It needs to happen.
That it may not go through. JDI, just do it!
What is the actual measurable benefit?
Lower the property taxes
How long it is taking & how much that is costing...
Greatest concern is that the apparent complete ineffectiveness of the Turner Valley council to maintain or attract a healthy business community will trickle over to Black Diamond as a result of mixing council members. This also extends to TV town poor community service management ie pool operations, recycling center, etc.
Killing competition between towns.
When it is complete what will the organization chart look like and how many job positions will be eliminated? "Efficiencies".
Higher costs, less input from residents. TV inefficiencies and business vacancies trickling over to BD.
Higher taxes, we pay enough in black diamond as it is.
What will the total cost be?
That it won't happen due to misinformation being spread through unofficial channels (e.g., xxxxx emails)
Overall cost to homeowners and tax burdens.
Cost and taxes going up
Tax increases
nothing will change.

I don't have any
A waste of a lot of money. How much are all the consultants really costing? Even grants are from taxpayer coffers.
Taxes going up
That's the town's council's and administration's will actively engage residents concerns without bias for their personal opinions and status with current positions.
Equal representation
That it will cost taxpayers an enormous amount in increases.
Turner valleys tax bracket and emergency services provided, the costs of these services, and the response times.
The neighbouring community has absolutely NOTHING to offer us or this town, and we have no desire to amalgamate with them. There is absolutely no benefit to it and we have no interest in having a new town name, or a new address, or the expenses that go along with it.
My greatest concerns are the costs of the amalgamation process, job loss and increase in taxes.
Costs!! A lot of community members are struggling with the cost of living and can't afford higher taxes.
Property taxes
The voice of a few will derail a great opportunity.
Taxes and increase in taxpayer payments. If we are going to amalgamate will taxes go down. It doesn't look that way any more.
Increased cost of living and increased property taxes when we already pay incredibly high taxes in comparison to other areas. And most people can not afford cost of living increases especially in today economy, not now and not in a post covid economy
My greatest concerns are the overall costs of the amalgamation process, job loss, and raise in taxes.
That we will lose our identity!
- Losing town name and individual identity, which has not been researched carefully enough - Having to change my address Not interested, - Increased taxes due to expensive process and debt load - It's a terrible idea and most people don't want it
Is the taxes and town bills going to jump so high, to were people can't afford them?
Will amalgamation ACTUALLY save residents money?
No concerns

Having to pay to change my address and if town workers who keep the town working will keep their jobs
Costs, reduced services, keeping the silent non committal council members of each town.
What's it going to cost? Preliminary and in the future?
Cost to taxpayers.
None
Increased costs for residents because this has not be fully studied and administration has no idea what they want the end product to look like
Taxes and having double positions fill for no reason
Higher taxes.
Not being able vote on it. The decision was taken away from the very people who pay your wages.
Maintaining the unique identities of both towns as well as equalizing economic/fiscal impact on taxpayers.
Job losses/ reduction in service levels
Higher taxes, less service
That it will not go through. That a new council will be one-sided. That one entity will inherit economic liability from the other.
Increased costs and taxes
Higher costs of services, taxes
I find that both towns do not agree on many important issues. The latest being the transportation shuttle. If both towns can not agree then a better alternative to projects should be found. If our towns can't agree on services that fill social gaps, how can we expect them to agree on more important issues like the gas plant. My greatest concern is that the players at the table will allow their egos to get in the way of allowing fair mediation based on the voices of residents.
This is not a good time!
This is not a good time: personal, municipal, and provincial economic uncertainty.
Councils not having clear information about the impacts of amalgamation moving forward. Many towns who have amalgamated across Canada have not realized efficiencies or cost savings as predicted.
Financial burden will fall on the backs of taxpayers.
Taxing policing water availability and name change.

None
The cost of upgrading Turner Valley's infostructure to make it equitable to Black Diamond.
No interest in amalgamation. We chose to live in our town for a reason, and have no desire whatsoever to be affiliated with the neighbouring town. We would have bought a home there if we wanted to live there. We didn't, and we don't.
That you don't listen when we DO vote. What part of NO don't you understand?
Taxes increasing... like they aren't high enough already I think this needs to go to a vote BEFORE they decide to do this. I think they would be surprised how many people are still against it!!!!
Increase in taxes, water, etc.
The cost of fixing streets in both towns.
The process has taken far to long to resolve. The costs to complete this process are excessive, without genuinely reaching a result.
I have none. Lived her for 40 years and now t is long overdue.
expense to residents
Many years ago I received some sage advice on how to handle my very stubborn toddler. It's called the "No Choice, Choice". At supptime, I would ask 'do you want peas or carrots'. The underlying strategy would not be told...'you are going to eat vegetables'. This avoided a lot of battles, because it offered a degree of control to her life. She could decide which kind of vegetable would be eaten. My greatest concern is that the councils have decided to offer the citizens a "No choice, choice". 'Do you want a ward system', and 'What do you want to call the new town' are not the questions that I want asked. I want the councils to ask if their citizens want to Amalgamate. Period. Please do not dance around what should be THE QUESTION. Ask us. We are adults that want real control of our lives.
Twice it was voted down and councils chose to proceed anyway. The towns clearly do not listen to their citizens and the voting process is a sham.
Need to reduce spending and lowering our taxes
How will both Towns operation work as to Council and Mayor . I live in Tuner Valley and have to say that our Town Office has awesome employees. Our Council & Mayor are great with the community and hope they will keeping there positions .
Increase in Taxes
Property taxes remaining the highest in Alberta.
Not sure Inhave any

None
The cost that isn't recoverable through provincial grants.. another big worry is the Provincial mandating our membership at CMRB. Not good for Diamond valley
Loss of jobs, focus on Black Diamond because it has more businesses and Turner Valley being left behind
The possibility of one municipality having a stronger representation than the other.
That we are going to be paying even higher taxes than we already do.
Overall increased costs to the tax payers.
Nothing will change, only a new level of bureaucracy and costs associated with duplicated services and staff.
That the cost of amalgamation will increase taxes for town residents despite our taxes already being higher than many other areas. It would be great if the Finance subcommittee share the Financial Business Case and make it available to the public, for full transparency. This will give residents an opportunity to review proposed costs/benefits. And for us to be able to see what money goes where, and where the potential savings/efficiency are

What is your greatest hope with amalgamation?

Total Responses = 176

Reduced tax
Nothing, I love the town as it is.
1. Lowered costs (services, property taxes) and more coverage for services, resulting in growth of population/community as well as local businesses. 2. More spotlight on tourism industry on local town, perhaps a dedicated team/office that can bring in film industry & tourism industry business.
That taxes will go down
Costs lowered
Lower taxes
That development and growth combined with operational and administration efficiencies will result in property tax reductions.
That efficiencies of services can be achieved and that there will be more feeling of connection between the two towns.
That in 3-5 yrs after amalgamation a report can be generated to show where we were and where we are and where we would have been if we had not amalgamated. I think its important to keep track of the changes that occur which impact the municipalities and then waited as to the effect it would have had on each vs one

community. I hope it will reflect what we are expecting. Higher efficiency, less time spent going back and forth btw communities in decision making processes and the shared costs in services and duplication in staffing workload. Also it will be good to see the difference in service levels and what we have now vs what we have in 5 years.
Lower taxes, better services.
Creating more community focus and events.
That the operation/overall spending of the towns will decrease substantially and in turn our property taxes decrease quite a bit!!
lower taxes
That the two communities truly unite and leverage each other's strengths for the betterment of all. No one wins alone, no one loses alone.
Better services at the same or lower cost to taxpayers. And that Black Diamond and Turner Valley can retain their own identities once amalgamated. Also being a town of 5000 hope this does not attract any big box stores. We need to keep what makes us unique.
That our total cost of operations will decrease substantially, which in turn will lower our outrageous property taxes!!
That it doesn't occur.
We can eliminate town overheads
Taxes go down
That I am wrong about taxes going up.
I am hoping for an indoor pool and attraction of more businesses.
lower taxes
Not to proceed
property taxes will be reduced.
That our utilities will come down. That they will nix storm water as a utility. It is a real ripoff. People in the UR areas that don't pay should as they have storm water conveyances like ditches and culverts that need to be upgraded and maintained. I am hopeful that the Council in BD are more humane and care about the elderly on fixed incomes and the disadvantaged in our community. I would gladly pay more to help those people.
That it does not proceed in the time line put forward, until we can be assured that taxes will not rise, and services enhanced.

Hope that the quality and cost of living will improve due to having more shared services and efficiencies.
To create a thriving cohesive community that would benefit from new businesses being established. The vacant lots on Main Street are not conducive to a thriving town.
None
That it goes smooth and the province kicks in a bunch of money.
Cost savings. Stronger together
Applying synergy to do greater things like a recplex that can't be accomplished by one little town(s)
Reduced taxes through fewer staff.
To see enough funding that we can build up Turner Valley to a better standard for tourists.
lower taxes
Sharing of resources contributing to more efficiencies. The most suitable employees will get town jobs based on qualification and performance and not seniority.
Towns working together,,sharing as neighbors
A combined governance model better suited as two amalgamated municipalities versus separate municipalities using duplicate resources and effort.
Lower taxes
Significant reduction in taxes. This town does not provide the amenities to justify the obscene taxes.
Same as above, build a new community spirit and attract like minded families
That our taxes go down! And they keep jobs in the town. Why are my tax dollars paying another town to pick up my garbage and plow my street? Sure doesn't feel like the town makes their people a priority. We don't want to be a tourist town, if locals wanted that, they'd live in canmore.
More businesses coming
Lower taxes
To keep the names of towns the same...
savings for both towns but not loss of services
Save costs, and gain funding opportunities

that both towns will see an increase in commercial businesses and will work with developers to look at the potential of establishing in either one of the towns. I think the focus will be on attracting businesses to the towns and that the local residents will see tax increases.
Lower taxes
Reduction of overhead costs
Lower taxes and more services
Lower taxes; greater support from provincial government;
I hope that both town councils learn how optimize the budgets and better utilization of the resources. However as no one is personally held responsible for the jobs that they were elected for I foresee gross overspending, excessive allocation of funds and basically a lot of poor decisions and planning
Lower taxes
Every resident is treated with respect, regardless of whether they are from Turner Valley or Black Diamond and those with an axe to grind, they bury it and replace it with positive energy
Less taxes
Improved services at lower taxes than today as individual communities.
Tax savings, less administration
That in 3-5 yrs after amalgamation a report can be generated to show where we were and where we are and where we would have been if we had not amalgamated. I think its important to keep track of the changes that occur which impact the municipalities and then waited as to the effect it would have had on each vs one community. I hope it will reflect what we are expecting. Higher efficiency, less time spent going back and forth btw communities in decision making processes and the shared costs in services and duplication in staffing workload. Also it will be good to see the difference in service levels and what we have now vs what we have in 5 years.
Lower taxes, less duplication of services
Cost savings. Employee reductions and a significant saving for taxpayers.
That we will have only one good mayor and council. More police presence especially at night. Is this even possible?
Lower taxes.
Efficiency of services
Sharing services and joint energies

More efficient resource management
Taxes will be significantly reduced and that we have a more mature and experienced in life members of council.
Increased possibility of amenities/ expansions. Ie. Recreational complex, public use areas, etc.
Cheaper taxes!
greater efficiencies leading to reduced operating costs and elimination of duplicate services
increased business; public transit; public services
More businesses and greater opportunities for locals
I don't like that we are giving up our going to lose our individually.
That we combine services and whittle down to one town office and one council. Perhaps a break in our taxes.
Decrease in Taxes and fees
That it will truly benefit both towns, and also that each town will rerun its existing name.
Smaller councils
Get reid of <u>xxxxx</u> and <u>xxxxx</u>
That it won't happen, I like the town's being separate
Cost and tax reduction.
Infrastructure, police, less town vehicles driving around doing nothing all day.
Less taxes, more services, ie organics bin. Recyclable pick. Essentially green, blue and black bin service
We gain a more meaningful voice and wider audience... It is all about influence and connections at the end of the day.
Cost savings by amalgamated services. A unified approach to area development that will enhance and showcase the uniqueness of the area.
Lower property taxes
Decreased property taxes
That our taxes will be reduced
Decreased costs

Work as one, celebrate together, no competition, align progress together and of course save 100 of thousands by having 1 CAO, 1 Mayor and 1 council
Cost savings
Lowered costs
Reduced taxes
Efficiencies developed and delivered enhancing the development of the community for the betterment of the residents, environment and businesses
There will be an end to duplication of services, without a loss of quality in service.
More cost efficiency between the two towns. But keep our names!
I am excited about amalgamation! I love the idea of one council, one voice, growth and economical development.
Greater opportunities for grants and income.
Hopefully the taxes may ease off.
Hope it doesn't cost a fortune and destroy our unique communities
Increased amenities
that it will streamline operations, and save the communities money...basically making operations more efficient.
None
That the two towns can run much more efficiently than currently.
None.
It doesn't happen
Lowering of property taxes & more business approval for Turner Valley. Black Diamond seems to get more of the business approvals.
That it happen ahead of schedule. Efficiency improvements should not be delayed!
Less overall tax burden.
Wish it would stay seperate
Lower taxes
property tax reduction, less staff, less equipment

Lower property taxes?
None. I am against this farce that two outgoing councils are pushing down our throats.
It doesn't go through
That the people who are tasked with moving the process along work closely with its residents, businesses as well as the provincial government to look beyond the immediate and short term hard work and able to see the long term goal.
Lower taxes
That there will massive cuts in administration, redundant equipment and staff. Ultimately, the greatest hope is a reduction in taxes.
That it gets canceled
Our greatest hope is that council will finally respect the people's wishes and drop these amalgamation plans, because it clearly should not happen. This issue needs to die a quick death for once and for all.
Reduced taxes with a higher service level. Paved pathway system that joins both towns without any breaks in the pathway.
That it will lower taxes for both towns.
Better town services or cheaper
A louder voice with the provincial and federal government to get infrastructure dollars and improve efficiency of local government.
Nothing
Proof that amalgamation would increase efficiencies both operational and financially and that those efficiencies result in LOWER Property Taxes for residents of both towns. Also that each town retain their historic names Turner Valley and Black Diamond that amalgamation incorporation name change is done at a higher level "Diamond Valley" municipality (includes Turner Valley and Black Diamond) with no actual name change to towns and no changes of addresses needed etc
Reduced taxes with increase service delivery.
I don't have one. I am totally against it!
- That it doesn't happen at all! - Not interested in amalgamating whatsoever! - Stop trying to force this on residents!
That the town bills and taxes are lowered a very big amount
That it will save money for all residents

That it finally gets done.
That it won't happen
Lowering taxes, (or not raising), better representation, better council, promotion of business is both towns.
Reduce taxes and increase efficiency
Taxes will be reduced considerably.
Reduced administration
Increased commercial attraction
Taxes less and only one cao and less council people
Lower taxes, with greater services.
That is doesn't happen
Maximizing potential for cost reduction of provided services.
A strong vibrant community
Lower taxes, greater service
Increased efficiency of services between towns. Hopefully a decrease in taxes. Continued economic growth. Small business sustainability. Better, focused, development projects.
Combined services, reduced costs, better community feel
n/a
More resources pooled to fill gaps in our community such as transportation, economic development and youth centered resources
That it be set on the back burner for now.
If it goes forward the names do NOT change.
Improved services, police, firefighting equipment, more amenities.
That it won't happen. If it must happen there should be solid information to work from and that it is explained clearly for all to see.
One strong community moving forward without the he said/she said attitude
That in some way in the future their will actually be a benefit to someone.

We hope that amalgamation plans are stopped. This issue needs to go away! Our town is just fine as it is.
That you put the darn thing to rest! Our town is great the way we are!
I HOPE we do not amalgamate I think it's ridiculous, leave it alone
Obtain better funding to reduce living costs.
That our towns will no longer have rivalries against each other. We are close neighbours enjoy it.
That a result is finally achieved and accepted by both parties.
United front and eventually lower taxes
reduce costs by reducing redundant employees
My greatest hope about amalgamation, if the citizens want it, is that it be delayed until the costs of the Covid Pandemic are behind us. Amalgamation is expensive. Taxes in the towns are already very high. Do not burden us with the costs of something that really does not have to be done right now.
A new council that will respect voter's choices.
Less spending and lower property taxes
Having new businesses start up here which helps for employment , taxes ,
Increase in unity and marketing
Property taxes being greatly reduced.
Lower taxes, attraction of more business
Better service both from council and service workers and save money from not paying 2 of everything
That we move forward to create one community with one voice.
Bring the 2 towns together
The residents of the Town of Black Diamond and Turner Valley work together to make this a success.
Taxes reduced
Property taxes going down
the citizens will be able to vote on the proposed amalgamation in order to ratify the change.
Greatest hope: would be increased efficiency both in operations and in cost savings, and FULL Transparency of financial cost/benefit analysis. As I am not sure many in our communities could afford significant increase in tax base, especially given current economic conditions in both a covid and post covid environment

My greatest hope is that we all, both towns, work together for a better future through amalgamation. We ARE neighbors. There IS strength in numbers.

What do you want to know more about through this amalgamation process?

Total Responses = 169

Time schedule.
What the changes will be for Turner Valley.
1. Financial Statements of either town has to be fully disclosed to the public, both, in terms of current state and after proposed amalgamation. 2. Please disclose the budget for each town in different services/sectors, both current state and proposed state.
Why are we doing it, and how much is it going to cost us.
Why is this not going to a vote?
Cost saving measures
The financial impact on both Towns and how debt and reserves will be arranged.
Timelines, Election information and some idea (if possible) of cost and cost savings.
Updates and I'd like to know if there are concerns that are identified through JFAC and how they are going to be mitigated or when they will be discussed or where so that we can either help or be prepared for the impact if it affects residents.
Post offices? Will both remain?
Actual costs. What are we actually going to save. How much will this actually cost? What will our name be :)
Why it appears that the majority of the Black Diamond council, as well as the Mayor and the BD CAO are against the amalgamation?
costs, growth plan (population cap?)
What the road map to amalgamation looks like, when we reach some milestones.
Timelines and chance of success
Why there is so much resistance from the Black Diamond council, Mayor and CAO?
Nothing.
Just hurry and get it done

If there will be set terms for council members so they don't get stagnant
How much it will cost. Why you are only telling us how good everything will be.
Just continuing to be kept informed of council decisions.
cost. a true look at costs. lower tax ???
what is the cost?
It doesn't matter you will do what you want regardless. That is the reason it seems that people don't care. Because they have no confidence in the process.
List all cost savings associated with this amalgamation and also list all the cost that will increase because of Amalgamation. Taxes being paid are to high already. remember there is only one tax payer and we have had enough.
Would like to know which services will/could be affected and know pros and cons of amalgamating.
Financial pro's and con's.
Cost.. how much have spent to date
WHY NOW??? Budget. Where's the money. Why so many guesses about what good things will happen. Haven't there been others to learn from?
How long will it take?
Just curious to follow the transition process especially how and what the new council would look like and be chosen.
Will each community keep their existing bylaws.
The accounting; what are the costs, the savings, where is money going in the long run.
how much it will cost through property taxes. honestly that is about all most of us are concerned about, through talking with people, as both towns are like one already!
What is the provincial government involvement, if any? Who makes the decisions around fairness in salaries and job descriptions?
Financials, short, interim and long term scenarios that new councils will need to consider
What role and purpose will the amalgamated municipality serve in the Calgary Regional Growth Board? Will it be a member? How will a regional growth plan effect the amalgamated municipality...representation and consent?
Financial impact
How to lower taxes.

Like everyone else, money, and the best long term examples of efficiency as possible
This has been looked into many times before and has not happened for I'm guessing good reason, why all of a sudden is this a must.
The focus of our goals as one place
Costs and savings.
costs, staff sizes, not overloading office staff at sacrifice of staff out working the towns
How fair representation and taxation will work.
Do the RCMP service Eden Valley now and if so, will they continue to after amalgamation? Are they paid for this part of their work from the province?
The effect on emergency services such as the fire department.
Nothing. I think it's long overdue
We hear about the positives, please also deal with the negatives so people have an informed discussion.
The hard numbers. True transparency, I want to be able to feel confident that the elected officials have the towns people best interest in mind. It's hard to listen to council talk about nothing in the first few meeting. A couple big words, and a few fancy acronyms on a slide show. Come all I know you can do better
Pros and cons.... be honest about them... makes it easier for everyone in the long run
The bottom line! Is there going to be an increase in rates and taxes, utilities etc? How is the transition going to happen
Is amalgamation a forgone conclusion no matter the concerns of its communities. Unresolved questions around taxation and service improvements.
Clarity and transparency. What are the benefits of amalgamation? Who pays for the RCMP?
Updates and I'd like to know if there are concerns that are identified through JFAC and how they are going to be mitigated or when they will be discussed or where so that we can either help or be prepared for the impact if it affects residents.
Financial picture
Will there be a significant cost reduction to the tax payers? Will there be positions in the public works, By-law and parks and rec sectors that can be eliminated? Will the town councils remain separate, or will they become one? Will we be changing the names of the towns and if so will there be any public input regarding any change?
How the towns will be governed. One mayor and council?

Will address changes be required?
Mechanisms for controlled growth, expansion, etc. - to not lose our small town identity & sovereignty.
How much expenses are required to do it?
Costs in departments and staff at all levels
no comment.
Realistic time frame, and changes to taxes/services for residents of each town.
Hmmmm. Not sure
- timeline for changes with dates and milestones. - methods and processes for ensuring promises made are kept
How's going to be in charge? What are the benefits? Will there be a new council elected and a new mayor elected?
How will this affect us as a community
What it would really accomplish.
I would just like it done ...finally.
The benefits so don't go through with this and does nothing
The true costs, as well as the governance structures. I would like to have some assurance that Turner Valley residents will not be unfairly burdened with the costs related to repairing Black Diamond's overdue sewer upgrades.
Cost to taxpayers
Who is the driving force behind it.
Why it keeps coming up and trying to get put through but never does
Transparency around costs.
What are the cost savings for tax payers.
Minutes of meetings, plans laid out going forward
How the new amalgamation council plans to honour historical agreements and social support systems within the towns
How will representation be decided. How will the area be managed to bring future development and build out into the same alignment

Everything !
Costs, which services will be affected and how the transition will affect services offered by the town
I agree with the amalgamation but would like to see each town keep their name. I believe this is how they did it in the crows nest pass.
Fire department
Be transparent about the salaries and costs saved, this is public knowledge, however it takes a lot of time to figure out how to find this information on either TV or BD website.
Final cost savings
Upcoming costs
Do we have the expertise to pull this off or are we planning to employ the appropriate people or firm?
what does council believe the benefits are through amalgamation, more details then high overarching statments
What will happen to the land along the highway between the two towns that is currently in Foothills County?
Cost and costs savings, funding from other levels of government.
Financial projections, highlights of what changes people can expect to see that would affect day to day and pros and cons of the amalgamation
Timeline for how it will proceed.
After watching the many tries for this, your phone mtg was great and answered my questions. So - 'getter done buoys"
What are the actual costs? What are the actual benefits? What is the driving force behind this? Not just the fluff we've been given so far.
Benefits
nothing in particular.
Hard numbers, action plan, to back up the apparent big push for this to happen in the first place. How will police, fire, services be handled, and where will they be stationed. What benefit to the residents of an already thriving community to amalgamate with a stagnating other.
Nothing
Why it I taking so long, as other communities have gone through the same process in a fraction of the time...
Why continue the process? Too much money and time has already been wasted. If they haven't been able to disclose clear numbers and facts to this point, there must not be any.

Nothing, should not happen
How will the town council be effected & how will our emergency services be effected.
Why is the process taking so long. Can it be done faster
Exactly how costs will affect homeowners. Break down things in easy to understand snippets.
How we can halt it
Financials of pre and post amalgamation. What has happened at other amalgamated communities such as Lac La Biche?
What will it look like?
I want to know when you call it off.
How will it affect our taxes & how are the town(s) going to pay for the changes of addresses etc
I would like to know that honesty and without personal agendas the process can move forward and in a timely and effective manner.
I want to know that finances moves to the top of the list of important issues. If failure to address this one issue as the main reason to amalgamate, your "get it done at all costs" plan will ultimately fail.
How the budgets will work between the two towns becoming one. Who will be in charge of departments. Who will be mayor. Who will be fire chief. How will these things be amalgamated.
We'd like to know why two out-going Councils are trying to force amalgamation through when most people clearly don't want it, and then leave it up to a new Council to deal with the inevitable fall-out from it? I would expect my town council to be more responsible and more respectful of the peoples wishes.
Cost of emergency management? Will we need to hire a full time fire chief to manage the emergency management department? Current population.
Costs! What are pros and cons? How will this affect taxes. What are the goals of amalgamation?
How this will effect services and property taxes
Keep up the great work on updates via social media.
I want you to take into consideration the town's people. We have voted this down may times over the years and it should for sure be a vote again.
Full disclosure of Financial cost benefit analysis, full transparency of all major issues /topics that effect the decision - finances now and what look like if amalgamation occurred - taxes savings (hopefully not tax increases as if going to cost us more why would we do it) - new council structure - new staffing structure - infrastructure - capital savings - grants avail from provincial and federal governments Full disclosure Full

transparency And ability for all residences to vote of matter if move forward or not , either with vote formally or informally so the elected member vote according to what the majority of their constituents want
Where are the cost savings? Will we need to hire additional municipal enforcement staff? If so, do the members we already have move up on the AB Municipal Enforcement grid? Will we need to hire a full time fire chief to manage the emergency management department? Current population
I would like to know why their was not a plebiscite this time.
- Why this is being forced upon residents who clearly don't want it? - Why are you trying to pass this off as being a big tax savings when any amalgamated community can tell you that is NEVER going to happen?
Everything
HOW will amalgamation save us money as council members have claimed
Nothing further.
What are the actual facts and costs associated. What will increase or decrease etc. Will town workers keep their jobs (they should)
How it will benefit me and my family.
Timelines and public input
Cost savings.
How will it affect my property taxes
What the plan and final outcome is
How many will be council we have to many already
Costs
Why we were denied a vote.
Service distribution scenarios, taxation rates, advantages and disadvantages of amalgamation for the communities.
What is the vision for growth and sustainability
Service plans for community, plans for resource use, growth plans,
What the financial impact will be on households and services
How is population expansion being considered, given how water is a problem now and will likely be even more so in the future.

Who is who in the zoo!!
How can you justify the timing as everyone struggles with the pandemic?
How can we commit to this in a time of extreme uncertainty? Can you postpone this until residents regain employment, so towns can expect taxes will be paid, until pandemic is under control? Why now?
Actual costs of amalgamation and any true cost savings
What will the name be?
The policing and the water and the name changing.
What happens if we don't amalgamate?
How many town workers will become redundant and removed?
On social media, amalgamation is being depicted as being a great cost savings, which it clearly won't be. Just talk to those communities that have amalgamated previously, where no cost savings were had and the move was often regretted. With regard to keeping our own town names, Council members keep comparing us to Bowness and to the Crowsnest Pass, both of which are totally different scenarios than we are here. Council needs to get themselves 100% clear on this issue and stop misleading citizens with information that is just not correct.
That you've dropped this stupid idea! xxxxx xxxxx
What the plan is, how it will affect the community, costs of living, etc.
What we would need for employees of our combined towns and what it will do to our town taxes.
Published factual pros and cons of amalgamation issues, along with estimates of costs.
Why do we have to wait? Get it done before the next election. The debates are over, the motion is moving forward don't drag it out to only cost more money
how much are we going to save in taxes, property taxes and utilities are way over priced and we barely get any service and are forced to pay for recycling both to the TOTV & Range if we want plastics recycled.
What I want to know right now is EXACTLY how much this is going to cost. A lot of fuzzy thinking is happening. Economy of scale, severance packages, staffing, equipment, and a whole lot of other topics are thrown around, but no one has sat down and costed out these things. Where is all this money going to come from? Has it been confirmed that it is actually available and locked in? Do it!
Nothing.
Need to see more of the financials with more transparency
Keeping both Towns name the same. Plus with amalgamation what will be the cost of our RCMP
just to be kept informed

How taxes will be handled.
Just to be kept updated with the process
Whats our new name
Everything that I need is in the amalgamation feasibility study of 2017 and current public info.
Cost analysis Benefits for both towns?
How the services will be provided? Is there going to be the same number of staff? Will they be working out of one shop/office?
How it is going to affect us. We want it to actually be clear and less confusing
How town councils and committees will merge
when is the ratification vote on the proposed amalgamation. without a ratifying vote this process is invalid and frankly a betrayal of the public trust.
Would like to know more about: the financial business case showing the costs/benefit analysis of whether or not to move forward with amalgamation for our towns

Ward Activity Comments - Town Websites

Total Responses = 3

To All It May Concern,

The idea of an amalgamated municipality is an interesting one.

It has a potential for more powerful position when negotiating. > > > A good thing for the amalgamated municipality.

"At-Large System of Voting" is fraught with problems and people will be less interested in taking part in local elections with a mindset of something like "it's a whole city thing – what is there for me?". All politics are local. This "At-Large" system would generate leaders with particular interests in certain part(s) of the community while almost certainly neglect other ones. Plus the political leaders born through such system are subject to what we have all witnessed in what is unfolding in our Southern Neighbor right now.

In short, if current leaders of both Turner Valley and Black Diamond have real good wishes for the future of our generations, "At-Large System of Voting" should not be used.

Now let us take a look at "Ward System of Voting".

The idea of "Ward" is quite similar to "Member of Congress". You divide geographical locations into several pieces with more or less equal population on each "Ward". You vote on election day using paper ballot with photo ID and certify the result by the end of the Day, and you get a representative of such a "Ward". Eligibility of being a candidate for Ward should be determined by local residents consulting with current leaders.

Selecting a Mayor for the amalgamated municipality is a huge burden for all involved. Such a candidate should stand scrutiny inch by inch by everyone. Beyond that, there must a mechanism in place when things go south after a Mayor is elected and is later found to be in a conflict of interest (this is the least form of breaching public trust, by the way). However, the mechanism better not be "misused" like when we heard all those years about "Russia, Russia, Russia". The Executive – the Mayor – should be prepared to stand before Ward Committee and explain his/her policies. Anyway, just some ideas for your entertainment.

I would NOT choose ward format for following reasons

1. Nobody might run in my designated area
2. The candidate(s) in my area might be totally unsuitable
3. A different area might have more than one really good candidate
4. I'd like to choose what I believe would be the BEST candidates for the towns.
5. For another voter they could still choose one from each area if that is what is important to them

xxxxx

Turner Valley

Friends,

I am a citizen of Black Diamond. Concerning amalgamation, I answered the on-line Ward survey today. (I prefer at-large voting rather than ward voting, specifically so that we can move forward in being one community instead of holding onto the outdated idea that we are still two communities.)

Independent of my own opinion, here is my additional concern:

I didn't see any restriction from answering the ward survey with multiple entries. If some residents have strong opinions, what will prevent them from reopening the survey dozens (or hundreds) of times to enter their preference?

I opened the survey once, and entered my opinion. But I caution you to consider whether the data collected by this survey might be very skewed if others don't approach the survey in the same manner.

Naming Activity - Town Websites

Total Responses = 177

Total Name Suggestions = 222 (some responses contain multiple suggestions)

<p>My name idea is Mountain Valley.</p> <p>When my husband and I moved here 2 years ago, the instant selling feature was when you drive into Black Diamond, and you see the mountains shining in the background and you see the towns nestled in the valley below it.</p> <p>I think this name accurately depicts the love of the nature around us, that we residents have as well as aids in tourists wanting to come. People wanting to escape the city will naturally visit a town called Mountain Valley more than Diamond Valley or our current names because of how it already sounds like a retreat back to nature.</p> <p>Thanks for reading my email!</p>
<p>Diamond Valley. As far as I am concerned, that's THE only lovely option!</p>
<p>I was under the impression that it had been decided years ago. Diamond Valley can be seen on several businesses already. It is this just a ploy to make people THINK they have a say?</p>
<p>Not sure if I'm in the correct place for this, but my thoughts for changing names is that they should remain what they are....Turner Valley is known all around the world for oil and Black Diamond for Coal....they have their own identity for a very good reason...there is no reason to change them. The area has been known as the "Foothills" forever, leave it like that. It's really no different than the "Crowsnest". We are in a depression and a pandemic that never seems to end...money is very tight for many...it would be a huge waste of money that could be used for improvements rather than a needless change of names. Everything would have to be changed right down to stationary, logo's even your banking.....so much money! Thanks for your time and I hope this comes down to good ole fashioned common sense.</p>
<p>Personally, I would like both towns to retain their current names but be under the Municipality of Diamond Valley. Changing the town names would mean a lot of work for residents to change addresses on many things including passports, banking, CRA, etc. Some of these changes would involve a charge to residents.</p>
<p>Since this is a new place for people to discover, the name should be Discover, Alberta</p>
<p>Black Bart Valley https://en.m.wikipedia.org/wiki/Black_Bart_(outlaw)</p>
<p>Hi, I have a suggestion for the town names. It would be easiest to continue with the names as presently used, for personal items (e.g. all of our personal health care, drivers license, mail, etc) For town business the area can be called Diamond Valley. The choice of Diamond Valley because it is a name many are familiar with and used by some businesses and groups.</p> <p>The towns would be / are like the neighbourhoods in Calgary. When asking where a person lives in Calgary, people usually name their neighbourhood e.g. Deer Run, Parkland, Whitehorn, Temple, Silver Springs, etc. If one wanted to go with an entirely different name, I liked John Waring idea of "Sheep River". As the river does run through both towns, it is a unifying feature.</p>
<p>I think that our towns should keep their original names, Turner Valley and Black Diamond. It's been that way ever since they were named. Keep the community name Diamond Valley. Why change these names, it's going to cost us, the tax payers, more money. Money I would rather see in making some cosmetic changes and maybe new town signs.</p> <p>If it matters, I am definitely for amalgamation!!!!</p>

Keep both their names....like the Crowsnest Pass has done...there by they are not losing their individuality.....for municipality name Diamond Valley as it seems to go together better.
<p>My proposal for the new name is: Diamond Valley. This is an easy change to a name already synonymous with the two Towns.</p> <p>Second choice: Sheep River. Speaks to our location.</p>
My suggestion is both Black Diamond and Turner Valley retain their individual names with Dingman No 1 for the municipality name.
<p>I would like to see the municipality named after the Sheep River that winds through both towns.</p> <p>Some suggestions:</p> <p>Municipality of Sheep River Hills</p> <p>Municipality of Sheep River Valley</p> <p>Sheep River Municipality</p>
<p>It is a combination of the names of the 2 towns, many already reference our collective area as Diamond Valley, it maintains an equal reference to the history and the historical location/and the mined resources (oil, gasoline and coal - the Diamond is a compressed carbon.</p> <p>Our local businesses, stakeholders and special events ie parade, are using the identifier "diamond valley".</p>
<p>My choice is Diamond Valley. Many local businesses associate with both munis now.</p> <p>Most people outside refer to our area as diamond valley. It's a little from both and complement one another.</p>
<p>Hi, I've tried to think of something that would describe the beautiful area that these 2 towns are in! As I drove into Black Diamond from Okotoks I again admired the stunning view of the valley in front of me.</p> <p>So I would like to propose "GRANDE VIEW". It has a nice ring to it & there are grand views in every direction! The mountains, the hills, the fields & pastures....even the towns themselves set among all this beauty!!</p> <p>There are a lot of building and streets named Grand View, but I didn't come across any city or town in my search on Google.</p>
<p>I have been a resident of Black Diamond for 18 years, am generally happy with the way things are run here, and believe we have a much nicer town than Turner Valley. However, I can't help but feel that we are wasting resources and losing a slice of history by naming the amalgamated town anything but Turner Valley.</p> <p>Turner Valley already has a nice logo (as does Black Diamond) so we wouldn't need to pay anything to design a new one. If the town office were to continue to be at the Turner Valley address, we wouldn't even have to throw out all the existing signage, truck decals, letterhead, etc.</p> <p>The main reason I believe we should keep the name Turner Valley is the historical significance. I grew up in southern Alberta, hearing about the Turner Valley gas and oil fields, the contribution to the second world war as the chief supplier of fuel to the Allied Forces and other colorful stories. Never once did I hear about Black Diamond producing coal. The only thing I ever heard about Black Diamond (50 - 60 years ago) was that it was easy for underage people to get into the bar. As I said I have lived here 18 years now and other than guessing where the mine might have been and seeing the cart in front of the Town Office see no significance pertaining to coal whatsoever.</p> <p>We have a tendency in Alberta to let our historical sites be torn down in the name of "Progress". We don't need to let Turner Valley disappear from the map just to assuage the egos of those of us who live on the Black Diamond side of the fence. We can just as easily tell the coal mining side of the story under the banner of Turner Valley.</p>
Diamond Valley. It's a strong name but also pretty, rolls easily off the tongue & is a place I would like to visit or live.

My vote for the new combined entity is:
'Municipality of Diamond Valley'
with both towns retaining their current names. Like Crowsnest Pass did.
My vote is for Diamond Valley. People already identify this area as Diamond Valley, it is familiar and comfortable.
Foothills
I vote for Diamond Valley but to keep each town name the same.
I am sure you have had this already, but I love the name "Diamond Valley" –combination of both towns and a lot of other stores and businesses have already adopted that title.
I think we definitely name it black valley. Or just keep black Diamond.
I would like to see the town retain their names if possible. If a name change is absolutely necessary, then Diamond Valley.
It is already in use in many areas/events of the communities
Just adding my two cents into the account. The name I think should be used is the one most people already use. "Diamond Valley" Simple, to the point and all encompassing.
The correct answer is... Black Valley
The most logical name everyone knows is Diamond Valley. Other businesses and residents already use this name and the area is already known for it. It is the best transition name.
I believe a good name for the town would be Town of "black Valley" combine them and keeps some heritage of both.
Diamond Valley
Diamond Valley seems a fine name for this area.
Please consider this message as our name submission for the upcoming Black Diamond / Turner Valley amalgamation. I am a member of the Valley Neighbours Club as well as a member of the Turner Valley Legion. My wife and I feel it is important that the new name chosen should have instant recognition/association with both towns so that those "outside" the County of Foothills boundaries, unaware of the amalgamation, are still able to make the connection. Also, for those of us "old timers" who have lived in this area for years, incorporating a portion of the former names in the new town name, retains the new town's "roots/origins" which we will always associate with. Our name suggestion is.....DIAMOND VALLEY.
The Municipality of Diamond Valley. This would allow the two communities to keep their names.

Actually, there is no name that could ever replace two historically significant names, Black Diamond being named after the coal mine that was once here (I know it was pulled from a hat) and Turner Valley's name prominent in the discovery of oil! I believe the name "Diamond Valley" is not available, but I may be mistaken. In my option that would be the only appropriate name. Once you take on a new name the old ones disappear. Remember Port Arthur and Fort William?

I feel that amalgamation is a horrid thing to thrust upon the citizens of our towns. Why should 14 people (2 mayors and 12 councillors) be able to decide our fate without a plebiscite to involve ALL the residents? The previous one showed that Black Diamond was not in favour and Turner Valley showed a small margin of being in favour. The costs of running an amalgamated town are not going to be the great savings some think they will! As witnessed in the last flood you still have to have duplicate services on both sides of the Sheep River. We are able to share some services and should continue to do so. Or maybe we should just hire Okotoks to run everything!

You should have insisted we be given special consideration so that we could keep our identities or baring that just abandoned the idea.

You ask that we submit a name with each correspondence.

High Country is an area, not a town; Sheep River is a river not a town; Black Valley is just ridiculous.

Leave us as we are and pull out while you can.

Do I get a say? I'm no longer a resident, but I work in town. I suggest the name "The Town of Sheep Creek". Historically, the Sheep River was called Sheep Creek. It was also called the "South Branch of Sheep Creek" (with Threepoint Creek being the North Branch). "The Town of South Branch" is also pretty good, in my opinion.

I like Diamond Valley. The area has been referred to that for years. I would hope the two towns could retain their names as districts or for postal purposes.

Municipality of Diamond Valley - That's the name I would pick, as it includes both of the towns' names.

So I liked this part of the history from the Black Diamond website: "Gas & Oil Boom The discovery of oil and gas in neighboring Turner Valley stimulated a construction boom in Black Diamond. By 1929, the population surged to over 1,000, with oilfield workers and their families living in shacks and tents. From 1914 to 1947, the derrick-studded landscape west of town was the heart of Alberta's petroleum industry. The local demand for construction was met by building around the clock in the light of the flares, the glow of which could be seen from Calgary"

So I thought "Red Valley" or "Flare Valley" for the combined name for the glow from the construction in Black Diamond which was caused by the oil and gas in Turner Valley. The towns fed off each other.

My other thought was to have Red Valley/flare valley translated into whichever first nations group was historically the most prominent in the area and use that instead to honour the people that also called the area home before the founding of the towns.

We should follow the lead from Crowsnest. Continue with Turner Valley and Black Diamond postal codes remain as is, under the municipality of Diamond Valley. A complete name change would be inconvenient for residents, as we would have to change the address on all our personal documents (Driver Licence, insurances, utilites etc.)

Simple, seamless and convenient.

We submit that the new town be called Diamond Valley.

Diamond Valley

<p>Friends,</p> <p>My naming suggestion isn't very original. The name is widely in use by locals. But I think "Diamond Valley" is the perfect wordsmithing option, using elements of both town names in a short-and-sweet combination to present an inviting new name to the world.</p> <p>More importantly, I do not support the idea of somehow retaining the old names in the structure of coming up with a new name. I know some have expressed the sentiment of somehow trying to hold onto the old names even after amalgamation. In my opinion, that idea undermines the spirit of moving forward, becoming one community instead of two, and looking to the future rather than to the past.</p> <p>Thanks for the chance to comment.</p>
I would like the two towns new name to be Diamond Valley.
Diamond Valley
<p>Diamond Valley.</p> <p>No need to reinvent the wheel.</p>
<p>Diamond Valley</p> <ol style="list-style-type: none"> 1. It highlights the best part of each town description. 2. People from Calgary already refer to these towns as such. 3. There are many businesses registered in the area with that name.
<p>I vote to keep original names. Black Diamond and Turner Valley.</p> <p>And in light of the two towns completely bumbling this amalgamation by #1. Not getting special status to keep our original names and #2. Not looking into finances, let's call the municipality...</p> <p>Black Valley</p> <p>The amalgamation committee need to listen to Council members that have researched this to no end and vote no to this costly endeavour.</p> <p>Refusal to look into financial consequences by the committee tells me they are not qualified.</p>
The name I wish to propose comes from the history of Turner Valley oil relationship and Black Diamonds one in coal. The colour in particular. Black Valley. I really wouldn't want it called Diamond Valley. It's been used before and reminds me of a new sub division in Calgary.
I choose Diamond Valley
Propose the name to be DIAMOND VALLEY.
I'd like to submit the name Sheep River ("the river that unites us") for the new amalgamated town name.
Hello. I would like to submit the name Diamond Valley for consideration of renaming locations .
<p>Dear Individual, obviously DIAMOND VALLEY would be a choice; however, since the history of the area gave the one community the name associated with the main source of livelihood at the time- the more realistic choice should be:</p> <p style="text-align: center;">BLACK DIAMOND VALLEY.</p> <p>Turner Valley should excuse the fact that valley is at the end because if it was at the beginning an 'of' would have to be added and Valley of Black Diamond does not have as nice of a "ring" to it.</p>

Please strongly consider Diamond Valley!

If the names of the towns remain as they are, fine. It would be like the Crowsnest Pass with the smaller towns retaining their names.

I will reiterate - DIAMOND VALLEY, DIAMOND VALLEY!! This name combines the two names very nicely and has a very unique ring to it.

We would suggest that the following name for the proposed community be considered:

Diamond Valley

To us, this would make the most sense because the area is already known by this name.

The logical choice is ... "Diamond Valley"

Why?

-You have "Diamond" from "Black Diamond" and "Valley" from "Turner Valley"

-It sounds great and can be easily marketed! A Diamond is a gem, and well, the amalgamated area is and will always be a "treasure/gem"!

-It's unique - I could not find any existing municipality anywhere in the world with this name. There are landmarks, regions, etc. with this name but as a municipality I believe it would be unique

-"Diamond Valley" is already the name of the region that includes existing Black Diamond and Turner Valley, among other nearby places <http://www.town.blackdiamond.ab.ca/DocumentCenter/View/237/Diamond-Valley-Region-Publication-PDF?bidId=>

-There are already multiple businesses in both existing Black Diamond and Turner Valley that start with "Diamond Valley"

(It's as if local business owners have been anticipating this for many years.)

-There are already many existing local events that begin with "Diamond Valley", i.e. "Diamond Valley Parade"

-The local Chamber of Commerce that includes Black Diamond and Turner Valley is already called the Diamond Valley Chamber of Commerce <https://diamondvalleychamber.ca/town-events>

-Even the local Book Club is already called "The Diamond Valley Book Club"

<https://www.sheepriverlibrary.ca/Events/The-Diamond-Valley-Book-Club?id=1620760500-111894>

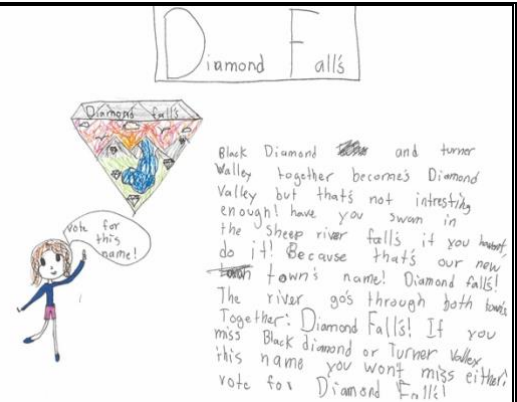
"Diamond Valley" just makes sense if amalgamation goes ahead.

Thank you.

We would like to submit the name, "BLUE RIDGE VALLEY"

As one travels west on highway no.7 you can see the blue color of the foothills with back drop of the snow-capped Rockies. A Stunning View.

Black Diamond and Turner Valley together becomes Diamond Valley, but that's not interesting enough! Have you swam in the Sheep River Falls? If you haven't, do it! Because that's our new town's name - Diamond Falls! The river goes through both towns together: Diamond Falls! If you miss Black Diamond or Turner Valley, this name - you won't miss either! Vote for Diamond Falls!"



Black Valley should be the town's name because it suits the town and it's the black part of Black Diamond and the Valley part of Turner Valley



Black Valley sound be the town's name becaes it sotes the town and its the BLACK part of BLACK Diamond and the Valley part of Turnervally

Diamond Turner - back to nature. I believe this name is a good name because the Turner brothers found this area and Black Diamond found coal, so this is my name.



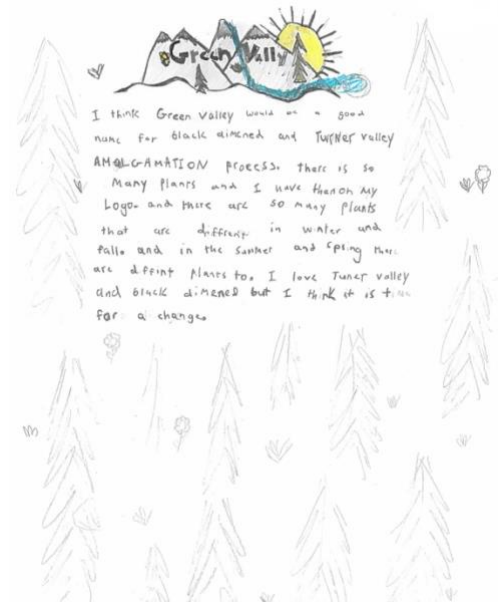
I believe This name is a good name because The turner brothers found this area and black diamond found coal so this is my name. Aka poster.

Fire Diamond - My name is the correct one because oil and coal make the perfect fire and the perfect fire makes the perfect food and the perfect food makes the perfect life



my name is the correct one cause oil and coal make the perfect fire and the perfect fire makes perfect food and perfect food makes perfect life next time

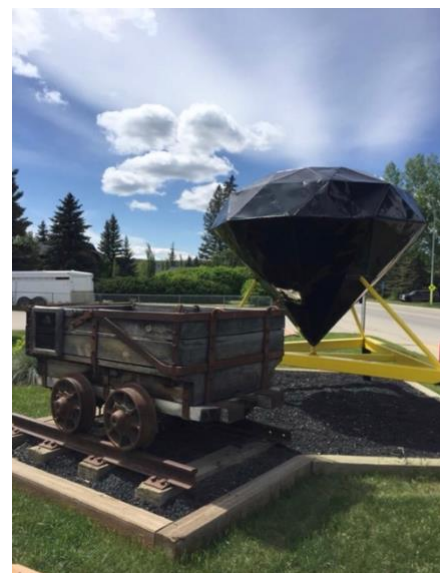
I think Green Valley would be a good name for Black Diamond and Turner Valley amalgamation process. There is so many plants and I have them on my logo. And there are so many plants that are different in winter and fall. And in the summer and spring there are different plants too. I love Turner Valley and Black Diamond, but I think it is time for a change.



I think it should be called Mountain Valley because there is a good view of the mountains, and the town is by the mountains.



I truly think we should have it all named Black Diamond as it's a wonderful name. Coal/Hematite (Alaska Black Diamond) But I truly think the Mayor of Turner Valley should be our mayor of both. Second option is Diamond Valley



I want Snow Sun Valley because it represents that we get lots of snow in the winter because we live in Alberta. And the sun part shows that in the summer we get a lot of sun and in the spring, we get a bit of both. Snow Sun Valley is very catchy. The snow part is good because we see the mountains almost everywhere in Black Diamond and Turner Valley. The sun part is also really good because especially now that it's the summer, the sun is out more - we get more heat. We have a lot of activities in the summer, so it shows that in this town we have a lot of fun summer activities. We also have a few winter activities but not too much because it's cold so that represents the snow part. That's it



explanation!!

I want Snowsun valley because it represents that we get lots of snow in the winter because we live in Alberta and the sun part shows that in the summer we get lots of sun and in the spring we get a bit of both. Snowsun Valley is very catchy. Snow part is good because we see the mountains almost everywhere in Black Diamond and Turner Valley. The sun part is also really good because especially now that it's the summer the sun is out more we get more heat. We have a lot of activities in the summer so it shows that in this town we have a lot of fun summer activities. We also have a few winter activities but not too much because it's cold so that represents the snow part. That's it!

My preferred choice for the town name is Diamond Valley.

What I am going to first talk about is the name, Diamond. Diamond is a part of the name, Black Diamond. So the reason why is because these people found coal in the shape of a diamond. and for some people 'Diamond' means a lot to them. The second thing I will talk about is the river part in the name. The name, River, came to me because the river already connects to both towns, Turner Valley and Black Diamond. So the river is also important to both towns. Now last, but not least, I will be talking about the valley part in the name. Valley is important to add to the name because Turner Valley is a town built in a real Valley. There's beautiful views of the valley and the hills.

Diamond River Valley



Why I called it Nature Valley: There is so much nature here.



Why I called
it nature valley:
There is so much
nature here.

Paradise Hills

Diamond Valley

I would like to propose the name of our municipality to be Kiska Wapta. This is the First Nations name for our area, (meaning Sheep River), because Indigenous people would hunt sheep along the river towards the west.

The fact is, we reside on Treaty 7 land. Before oil and gas, and before the Towns of Turner Valley and Black Diamond existed, this area was home to Canada's First People. Since we are retaining the identities of both towns (continuing to recognize Turner Valley and Black Diamond) because people belonging to the respective towns feel strongly about not disregarding their historical roots, I feel it is with the same heart and mind that we recognize the original name given to this area by its original inhabitants.

Furthermore, as a country we have been on a journey of truth and reconciliation with Indigenous people. I feel that naming our municipality Kiska Wapta (with permission from Indigenous leaders in this area) is a tangible step in that direction, a direction which I feel calls for more than just sentiment, but restorative action. It has been heartening to see the strong positive response to the suggestion of this name on several social media platforms. I feel our communities are ready for a step such as this.

Warm Regards,
-resident of Black Diamond

My suggestion would be that we officially become Diamond Valley. It includes elements from both former towns as well as already being a name associated with the area. By combining both town names it would honour both. I think one of the biggest pushes against amalgamation is that either town will lose its identity.

Having lived in an amalgamated Ontario city, Cambridge, I can assure you that Galt, Preston and Hespeler are still names used by locals to denote which area of Cambridge they live in.

I like the name "Diamond Valley" as my choice for the name of a future amalgamation of the towns. Thank you for considering this name!

I would like to submit "Sheep River" as my first choice. Thanks for the opportunity to participate.

My name for the combined towns of Black Diamond and Turner Valley is Diamond Valley

My suggestion is "Sheep River Valley" as the river that runs through both of our communities is our lifeblood. Here is a winter image of the Sheep.



So everyone does not have to change identification, insurance, vehicle registration etc. a good name would be Municipality District of Diamond Valley and leave the Town names the same as current.

I really like the historical name proposed by Jonathan Gordon:

Kiska Wapta

I grew up in a community in the U.S. where our neighborhood had a First Nations name, and every street had a First Nation's name. it was developed in the 1920's and is still a highly desirable place to live.

I like the name

Kiska Wapta (Sheep River)

If First Nations agree we can use it.

If not then

Diamond Valley

To Turner Valley and Black Diamond Mayors and Town Council,

It is not often towns have the opportunity to forge a new name and identity. I believe there is a unique opportunity to weave our past and present together. I hope our towns will give very careful consideration to the weight of this decision and not necessarily leave the final decision to popular vote.

This is not just Black Diamond and Turner Valley that are amalgamating, but this is an incredible chance to open the door for reconciliation with our history. I would like to propose a three-part name. A piece from our past, brought forward from the Stoney Nakoda First Nation, pieces from our present, Diamond (from Black Diamond), Valley (from Turner Valley). Three parts woven together for a stronger future. Whether it's:

_____ Diamond Valley, or

Diamond _____ Valley, or

Diamond Valley _____

I will not even attempt to offer suggestions but would recommend our towns consult with the Stoney Nakoda First Nation to allow them a meaningful opportunity to form part of our future.

Perhaps the new logo could include First Nation's art, but again, this would need to be done in a purposeful way and not just stuck on like a sticker.

As far as a slogan:

Gateway to God's country (probably not politically correct but how I feel)

Founded in Peace and Reconciliation

or

Gateway to the Rockies (Kananaskis doesn't seem to have a positive history with the First Nation's)

I like the idea of Gateway since it seems to reference a doorway to our future.

Maybe something even as simple as:

A gateway to our future...founded in peace and reconciliation.

Diamond Valley. Everyone is familiar with this name, and it incorporates the names of both towns.

DIAMOND VALLEY...so many things are already named as Diamond Valley already!

I like Jonathan Gordan's idea of an area name representative of our First Nation's and recognizing what this area was called before we named everything in English. This would need their input and support. Kiska Wapta

I love the name, as I'm sure many have suggested Diamond Valley. It lends credit to both former towns and is "catchy". Thanks for giving us the opportunity to offer input.

Someone has suggested Kiska Wapta or Sheep River. I would be ok with either of those names.

New name for amalgamated towns: DIAMOND VALLEY please.

Diamond Valley

Town of Diamond Valley

Diamond Valley

Sheep River Valley

Kiska Wapta is my suggestion

The communities of Turner Valley, and Black Diamond have a colourful past in the energy, agriculture, and tourism industries.

At this time, to consider amalgamation seems so right for a number of very important reasons. Given this incorporated boundary, a challenge lies ahead in community planning and development for both communities. The provision of community services, public works, social services, law enforcement, etc presently applies to both communities.

Upon completely considering the pros and cons, including citizen input and response, the following name suggestion is submitted for consideration should amalgamation become a reality.

Name of the new city or town: 'The City or Town of Heartland, Alberta'

A visit to the Heartland, Alberta cannot but help to leave a favourable impression upon the mind, and as well, upon the majority of those who visit Heartland. The reception by Heartland's friendly salt-of-the-earth people will radiate as tourists are welcomed. Also, nature's many unique attractions will favourably grab attention, steal the heart away, impressing all who take the time to stop and enjoy!! Because of what Heartland offers, once experienced, tourists will be sure to come back again and again as they thoroughly enjoy!

A proposed theme for the community of Heartland if accepted: "Alberta's paradise adjacent to nature's majestic wonder, the Canadian Rockies"

Heartland is attractive to permanent residency, to tourist visitors travelling Alberta, as well as tourists who frequent Heartland and area in search of recreation either within or behind the incorporated boundaries.

Thank you for accepting my input on the topic - Name sought in proposed amalgamation.

Discovery, Alberta
(after everything abundantly natural in the area)

Friendship, Alberta
(after the trail link, and in the spirit of joining together)

Good Evening, I don't have one specific name to suggest.

In light of the recent news, and hearing that there are still over 800 missing or murdered Indigenous children in Alberta alone, I ask you to please to respect and honour the local First Nations people.

Instead, I ask you to please consult with local First Nations/ Indigenous People, and ask them what the original names were for those areas. Then Please listen to them, and follow their recommendations.

This is such a great opportunity to show respect and honour for the original landowners, and to lead the province of Alberta in the efforts of Reconciliation and healing.



I hope that you will seriously consider my suggestion. With Respect and Thank You

<p>I would like to submit the name "Black Diamond & Turner Valley" as the name of the new "town" if amalgamation proceeds.</p> <p>Since both towns are losing their existing individual "town" names, it is important to keep those two existing names as our figurehead. If we don't, our individual histories will disappear into obscurity. Once your town name is no longer on the map, people soon forget about you and your long-standing histories and individuality. This is what will happen if we don't maintain our names as an actual "town name".</p> <p>Please don't let our towns and their histories disappear, and don't let us lose our place on the map. Thank you for your consideration.</p>
<p>"Prospect, Alberta (resources/adventure)</p> <p>Inspiration, Alberta (resource development/beauty)</p> <p>Outlook, Alberta (scenic/vibrant future)</p> <p>Union, Alberta (coming together)</p> <p>Wonder, Alberta (natural beauty)</p> <p>Beauty, Alberta (landscape/western feel)</p> <p>Ambition, Alberta (resource development/hard working)"</p>
<p>"This is a difficult one, and I have been pondering on the outcome of such a big decision. Mmm, what do we do? Keep our respective town names</p> <p>Call the amalgamation = Turner Valley Or. = Black Diamond</p> <p>Leave the names as they are?</p> <p>Call the two combined towns Diamond Valley</p> <p>Or perhaps = Paragon Valley</p> <p>How about. = Twice as Nice"</p>
Black Valley, Blacky McValleyface
Diamond Valley - brings both names in to play and sounds like an amazing place to live!
For a new name, it would only make sense to keep parts of both names. The best sounding name I can think of would be "Diamond Valley". Sounds like a great place to live!
I love kiska wapta for our 2 towns joining
I think it would be excellent to consult with the indigenous peoples of the area to name the amalgamated town something that honours reconciliation.
I would be in favour of diamond valley
My vote is to use the traditional name for our area "Kiska Wapta". Which means Sheep River. Especially in light of recent events it would be great to honour the First Nations of our region.
New name for 2 towns merger: "Black Valley"
Promise, Alberta (hope+commitment)
Sheep River...both townships have that in common.

The amalgamated "new" name should be "Diamond Valley".
Turner Valley is precious and so is Black Diamond so how about Turner Diamond. Making both precious equally.
When we travelled through New Zealand there were so many place names based on traditional indigenous names. My suggestion is a Blackfoot word "Awahsin", which means land, habitat, or territory.
Diamond Valley
As a 4th generation Turner Valleyan, I would vote for Diamond Valley. This is a local name we all use for the /area'.
Diamond Valley seems super natural to me.
I hope this email finds you well. I've heard Black Diamond and Turner Valley are potentially merging and the most perfect name is DIAMOND VALLEY.
I would like our municipalities be called Diamond Valley.
Kenneyville
Dingman
Diamond valley would be nice
Diamond Valley
My own suggestion is that the new town be called DIAMOND VALLEY
Diamond Valley
Diamond Valley
new name Diamond Valley is just fine name
Diamond Valley
Sun Valley
New name: Diamond Valley
Turner Diamonds
Diamond Valley
Diamond Valley, AB
Diamond Valley
Naming Process - "Diamond Valley"
Diamond Valley
Diamond Valley
Diamond Valley

<p>The towns of Black Diamond and Turner Valley have a shared history in energy production, which played an important part in developing both towns a hundred years ago. But the towns also share a river. The river connects us, sustains us, describes us. The river has changed us and has brought us together in times of floods and droughts. The wildlife don't care about town boundaries. They follow the river that joins us, and the Sheep River is our gateway to the high country.</p> <p>There are several examples of Alberta towns being called after rivers: High River, Milk River, Peace River, and Spirit River. Why don't we add a fifth – Sheep River. The term is already in use locally, e.g., Sheep River Crossing, Sheep River Centre and Sheep River Valley.</p> <p>Let us take the next step and bring the towns together under that fresh new name Sheep River.</p>
<p>As granddaughter of xxxxx, I would like to submit the suggestion of: The town of Black Diamond Turner Valley. I like the sound of it better than the town of Turner Valley Black Diamond. Also, I kind of think BDTV has a nice ring to it.</p> <p>Thanks for letting me through my 2 cents in. Good luck with making your choice!</p>
<p>Black Valley might be a good option Good luck with that!</p>
<p>Either Diamond Valley or Union Town. Diamond Valley, a municipal gem in a beautiful valley or Union Town, a dynamic new municipal entity with the promise of growth and unfettered prosperity.</p>
<p>First of all, congratulations to all the good folks of Black Diamond and Turner Valley on taking a very positive and Innovative historic step. I bet you guys will establish a precedence worth following country wide. in a time marred with insecurity and uncertainty, you have proved that thinking positive and working together is the only way forward. Considering the long heritage of both towns may I suggest merging the two town names as Diamond - Valley.</p>
<p>Friendship Valley</p> <p>Glendale (two different words for valley)</p> <p>Sarcee (it means "everyone" and also "boldness and hardy" in Sarcee)</p> <p>O'kio (it means "everyone" in Blackfoot)</p>
<p>Hello,</p> <p>Instead of 'Black Diamond' and 'Turner Valley', the amalgamated area could be called Heritage Valley. The name Heritage Valley:</p> <ol style="list-style-type: none"> 1. Recognizes the past and the amazing contributions from of the discovery of Oil (and Gas); 2. Includes the ranching and farming culture and the rich history of determination and hard work; 3. Compliments the area as a gateway into the Sheep River Provincial Park (which is protected for future generations); and 4. Is memorable - sticks in the brain easily for Tourism and Economic Development (It also looks good on a Beer, e.g., brewed in Heritage Valley, Alberta)
<p>Hi, here is my suggestion: Friendship</p>
<p>I would like to see both towns keep their current names, as the Crowsnest Pass towns have...</p>
<p>I'm in favour of 'Diamond Valley'.</p> <p>Possibly a municipality of Diamond Valley where each town is also able to keep its original name? Similar to the Regional Municipality of Wood Buffalo where Fort McMurray and other communities kept their names. But on a smaller scale.</p>

Just call it Turner Valley-Black Diamond. Many amalgamated/large twin municipalities use compound names, such as Minneapolis-St. Paul or Kitchener-Waterloo.
Late, but I just saw the story so thought I'd send the name idea to you. There is a Blackrock Mountain on the eastern Rockies, but no towns or municipality named this in Alberta.
My husband and I both like the name Diamond Valley for the towns' amalgamation. Part of the reason is that we live in the Diamond Valley Villas and other businesses use variations of that same name.
The whole area is like a Diamond in the Rough. Diamond Valley grabs a bit of both and celebrates the beauty of each
Conflict Canyon
Bookertin Village
Diamond Valley for name suggestion
DIAMOND VALLEY, ALBERTA DVA
Black Valley
Diamond Valley
Diamond Valley
Diamond Valley
Don't change the names of these historic towns. Refer to them as 'The Twin Cities' because of their identical history's.
I am sending in a town name idea. Name: Whoville Most people have heard the name before, and people would come to the town just to say they have been. Similar to Vulcan. Would boost tourism.
I have a couple: Black Diamond Valley Valley of the Black Diamond Valley of Black Diamonds
I know this is late coming to you. Our feeling on the name change . Leave them as they are. They are historical names for years. Why can it not still be Black Diamond, Turner Valley. Again this is history ladies and gentlemen. Many people may have not replied but feel the same as we do. As well your rural people.
I suggest Black Valley as the name, which pays homage to the Alberta oil, while keeping a little of both communities.
I think Ammolite would be a cool name for a town, it's the official Gem of Alberta and through the merger a brighter community is formed. Sheep River Yarrow - iconic plant

I vote for calling the amalgamated towns the town of Sheep River.
I'm from Calgary but I was thinking the same as someone else. Take a word from each town and suggest it. I would go with "Diamond Valley" sounds really nice. If you change it to something totally different, then people will say "where is that town located?"
<p>Just read about this and am 2 days late.</p> <p>Obvious:</p> <ol style="list-style-type: none"> 1. Diamond Valley <p>But cancel culturalists would be all over the coal history here. Unfortunately.</p> <p>Not so Obvious:</p> <ol style="list-style-type: none"> 1. Palliser - in honour of Sir John Palliser who founded Kananaskis of whom and that has history with both Black Diamond and Turner Valley. Would be wonderful. <p>He was an amazing man and did not name our gorgeous park to the west after himself - but instead chose an indigenous name.</p>
A vote for DIAMOND VALLEY.
<div> <div> <p>Welcome to Herronville Home of the Friendship Trail</p> <p>Herron = name after William Herron the "Father of Alberta's Petroleum Industry" first discovered oil and gas in the Turner Valley area.</p> <p>- Ville = named for the 1907 Black Diamond local postmaster Herb Arnold.</p> </div> <div>  <p>Herronville, Alberta</p> <ul style="list-style-type: none"> - Herron = name after William Herron the "Father of Alberta's Petroleum Industry" first discovered oil and gas in the Turner Valley area. - Ville = named for the 1907 Black Diamond local postmaster Herb Arnold.  </div> </div>
<p>Attention: Town Councils of Black Diamond and Turner Valley</p> <p>We implore you - please keep the town names as they are now! We do not see any reason to rename both Black Diamond and Turner Valley as the time and costs involved are not warranted. We also will not be changing our address on all identification cards, passports, medical records, mailing address, banking and investment portfolios, utility services, vehicle registrations, insurances, etc., etc., etc.</p> <p>We moved to Black Diamond seven years ago; Black Diamond is where we will continue as residents!</p>
<p>Hi, I saw your request for name ideas. I have a few for review</p> <p>The town of Blue Rock</p> <p>The town of Dingman</p> <p>The town of Herron</p>
<p>I believe a good name for the town would be</p> <p>Town of "black Valley" combine them and keeps some heritage of both.</p>
Diamond Valley. It is already used by some businesses and makes sense.
Diamond Valley. Many businesses use it already and people know it means both towns and area.

Public Event #2 Comments: July 22, 2021

Questions:

Does the name change only affect the organization name or will the municipalities name change also? For example; Crow's nest amalgamated but did not change the names of the municipalities.
Will web search engines reference the old names or Diamond Valley?
Please clarify how the name change will affect our drivers licences...
How will the name change affect residents address, land titles, etc, and who will pay for these changes?
What are the main advantages of amalgamation for residents of TV and BD that are most practically prominent (as opposed to more overarching efficiency advantages at the political and administrative level)
I have great difficulty with the Town Councils making the final decision on amalgamation in September 2021. How can anyone of the current Town Council Members vote in favour of Amalgamation, and take themselves out of a well-paid job? It is my belief that serious conflict of interest exists with the final decision.
What might be an example of a "Triggering Event"?
re the inbetween land annexed -- any thoughts yet on how this land will be zoned? Parks/residential/commercial?
In the capital review Black Diamond contemplated infrastructure replacement, which is urgently needed, however the plan brought the road back to gravel only. Why wouldn't the capital application require a paved road on completion of the project? This adds considerable cost to the application and results in a questionable capital assessment as shown in the slide. Please explain. Thankyou
To Councillor Cindy or other. Operating expenses. TV/BD \$14 million versus peer average of \$12 million. Suggests significant cost savings available beyond the \$370,000 identified. Please comment.
What would the Turner Valley town office buildings be used for after Jan. 1. 2023?
What is the approximate cost of holding an election in October and again in November 2022?
Will local improvement levies be the policy of the new municipality?
If some facilities are redundant, what financial impact would occur on divestiture?
Will responses to questions be recorded for us to study please? A lot of info seems to be there.
Beyond the Admin savings of 370K and the some of the advantages of trickle down, what are the main advantages for each resident for this amalgamation

I understand "thinking as one mind is good" but there is a level of ignorance of the regular resident about the advantages that you are seeing in efficiency
why do you think it will pass now compared to previous attempts
Please clarify the JFAC decision that operating revenues continue to support the existing debts of both municipalities before and after amalgamation. Does it mean that debt and operating revenues will be combined – or kept to the individual municipalities as like capital reserves?
Are the annual savings net of amalgamation costs? If not can a net cost/savings projection be done for 3, 5 and 10 years?
<p>Regards to estimated cost savings, in all information it appears that costs are downplayed, whereby savings are highlighted. Keeping in mind that almost all the recommendations will be decided by a yet elected council.</p> <ul style="list-style-type: none"> a. It has been stated that there will be a reduction of one Council and one CAO. Is there a cost for severance packages? b. It has also been stated that upon approval of the amalgamation and through the transition period, there may be other savings recognized. Will the committee recognize that there may also be other costs not yet identified?
Will the number of FTE staff positions be reduced post-amalgamation? In other words, will the number of employees in both towns be reduced? If yes, what percentage of staff will be made redundant. Will the only reduction in "staffing" costs be the elimination of 7 councillors and one CAO?
When the name is changed to "Town of Diamond Valley" will my Canada Post address change?
<p>Does the recommendation to council from the committee have to be unanimous?</p> <ul style="list-style-type: none"> a. Will the yay/nays be individually named? b. If JFAC recommends not to go forward, what happens? c. It is my understanding that the ultimate and final decisions rests with councils and that the proposed application goes to each council separately. Does this have to be unanimous within each council? d. If either council vetoes the recommendation what happens
<p>Why are the towns utility rates different if we are both under srruc and west end</p> <p>In regards to the survey questions for the method of voting, out of approximately 5000 residents, only 177 responded (with COVID-19 restrictions this was difficult to get out to the community, but with such an important issue I believe more should have been done). Now as it stands – the vote is “at large” so the possibility of a stacked council is very real.</p> <ul style="list-style-type: none"> a. Can a new council change this?
Neither Black Diamond or Turner valley have an HR Department, has administration and Council look at hiring a HR consulting firm to take staff through next steps?
<p>If the newly amalgamated Town of DV Council and CAO decide against eliminating staffing positions in the town offices, then why are we amalgamating? I thought that a major benefit of amalgamating would be the staffing costs and benefits? Is it not rather unsatisfactory to leave such decisions to the DV Council on how to proceed? This is a significant problem for the citizens of both towns as we do not want duplication of services!!</p>

Did you say reserves stayed with the taxpayers that gave them. A new council can change this and spend Turner valley taxpayer reserves on the black diamond side of the river?
You keep saying it's up to a new council . Have you looked at pay for people with larger departments in larger towns? Sorry I'm late so some questions may have been answered
Based on Premier Kenney's reasons for including three referendum questions at the October elections, the democratic way forward is for us here to have a referendum on amalgamation. Will there be a referendum and if not, why not?
I respectively ask each CAO - What do you believe is the one key benefit for your respective town from amalgamating.
Your web says \$2000000 savings for cutting a council. Black diamond budget says cost of council is around \$130000. Where is the difference
What are the projected tax savings per household?
Mayor Goodwin gave a good and logical answer to staffing. However, could both councils not even start to prepare some "recommendations" to the new DV Council? The continuity of staffing during a changeover of administration is, of course, vital and existing staff have to feel secure for the next few years.
If we will be required to have additional RCMP, will those officers be dedicated to our community?

Comments that were provided:

Very impressed with how thorough and thoughtful this process has been
We need an in person Town Hall meeting/s. Online is better than nothing but it's not that helpful.
It is so sad that more residents are not getting involved. Mayor Crane: re HR questions...you are quite right. We don't need an HR firm.
Mayor Crane is providing good information on the benefits of amalgamating the towns. Thanks.
Hopefully the new council will keep the unique aspect of the two towns and encourage more unique stores rather than franchises like Dairy Queen, A & W, Pizza Hut.
Yes, decisions have to be based on facts and not rumours etc. However, as you've given excellent information then it would bring everyone together if they had a say via a referendum.
Thank you
Thanks very much everyone for the answers - really helpful. Have a good night.
Thank you all.
Thanks so much for all the work and information you have provided
This was a very worthwhile presentation, and it was well run and informative! Thank you.

APPENDIX 1: PUBLIC EVENT #1 PRESENTATION

INTRODUCTIONS & GUIDELINES

Guidelines:

- Be respectful
- Be open to all ideas
- Adhere to established process and timeframe
- Allow people to speak without interruption

Online Tips:

- Muting
- Speaking
- Video / Recording

AMALGAMATION PROCESS
BLACK DIAMOND - TURNER VALLEY



2

AMALGAMATION PROCESS
BLACK DIAMOND - TURNER VALLEY

ENGAGEMENT

Kickoff
ONLINE PUBLIC MEETING



WELCOME

What we will cover today:

PROCESS &
TIMELINE

PROGRESS

DISCUSSION &
NEXT STEPS

AMALGAMATION PROCESS
BLACK DIAMOND - TURNER VALLEY



Turner
Valley

3

BACKGROUND

- Amalgamation: 2 (or more) municipalities merge to become one
- Legislation: Municipal Government Act Part 4 Div. 5
- Amalgamation discussions and studies have occurred for many years (1988, 1992, 2005, and 2017)

AMALGAMATION PROCESS
BLACK DIAMOND - TURNER VALLEY



Turner
Valley

4

BACKGROUND

- September 2020
 - Towns formally notify the Province that they are beginning negotiations with the intent to amalgamate
- Amalgamation process
 - a priority for the Joint Friendship Agreement Committee (JFAC)
 - extensive review of information and data
 - public involvement in the process
 - a final decision on whether or not to proceed will rest upon the outcomes of the review



WHY AMALGAMATION?

Many reasons including:

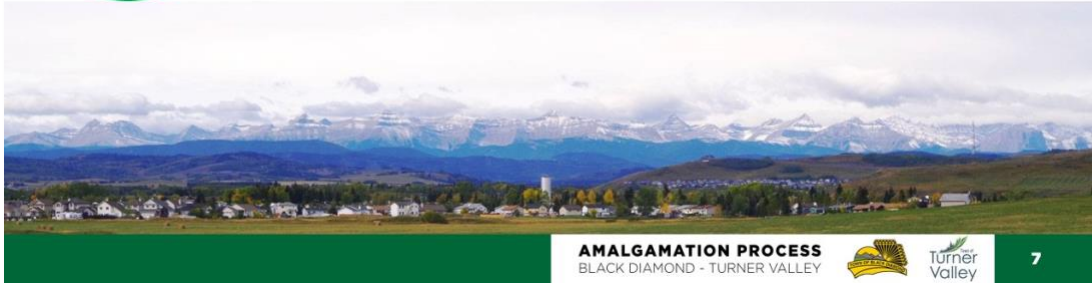
- History of collaboration, becomes more efficient
- Maximize provincial/federal funding
- Strengthen area's economic development



THE PROCESS



- Black Diamond and Turner Valley, with the intent to amalgamate, have begun the process to closely examine the impacts of potentially amalgamating the Towns.



AMALGAMATION PROCESS
BLACK DIAMOND - TURNER VALLEY



7

THE PROCESS

Goals

1. Balancing service levels with long-term cost,
2. Joint decision making that is effective, adaptive, and based on honesty and integrity, and;
3. Developing and implementing policies that are fact based, action focused, and achievable within a realistic and feasible timeframe.

Shared Objectives

1. Diversified and Resilient Economy
2. Integrated Policy Framework
3. Sustainable Service Delivery
4. Expanded Community Capacity
5. Responsive Local Governance

AMALGAMATION PROCESS
BLACK DIAMOND - TURNER VALLEY



8

THE PROCESS

Data collection and Analysis

- Analysis and recommendations done through 4 subcommittees
- Subcommittees are responsible for making recommendations to JFAC

Subcommittees:

1. Finance
2. Public / Stakeholder Consultation
3. Emergency Services
4. Procedure



PROVINCIAL REQUIREMENTS

8 Mandatory Topics:

1. Municipal Name
2. Municipal Boundaries
3. Municipal Status
4. Electoral Wards
5. Council Representation
6. Location of the Municipal Office
7. Proposed Incorporation Date
8. Annexation of Land to Achieve Contiguous Boundary
9. Other Matters



PROVINCIAL REQUIREMENTS

19 Transitional Topics:

1. Interim Council
2. Interim Chief Administrative Officer
3. First Election
4. 2021 General Municipal Election
5. Appointment of Returning Officer(s)
6. Ward Boundaries Review
7. Compensation to other Municipal Authorities
8. Financial Transition
9. Interim Tax Treatment
10. Tax Treatment
11. Authority to Impose Additional Tax
12. Assessment Matters
13. Employees and Labour Agreements
14. Bylaws and Resolutions of Existing Municipalities
15. Continuation of Emergency Services
16. Library Services
17. ICF Extension
18. Utilities
19. Westend Regional Sewage Services Commission

AMALGAMATION PROCESS
BLACK DIAMOND - TURNER VALLEY



11

THE PROCESS

Public / Stakeholder Input Throughout:

- Event #1: Kick Off
- Activity #1: Electoral Wards
- Activity #2: Naming
- Stakeholder formal request for feedback
- Ongoing public questions and input by email/phone
- Event #2: Reporting Back

What We Heard Reports:

- All input collected and reported back to the public, JFAC, and Municipal Affairs
- Subcommittees and JFAC consider input

AMALGAMATION PROCESS
BLACK DIAMOND - TURNER VALLEY



12

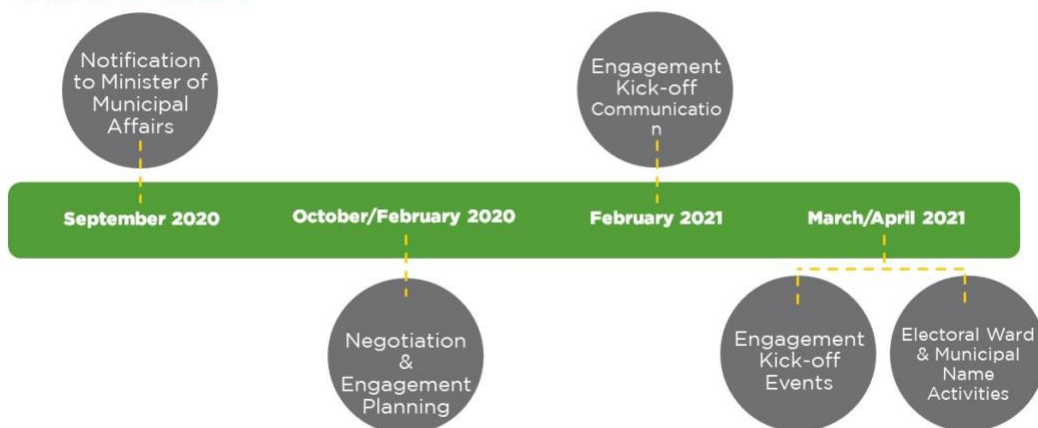
THE PROCESS

Finalizing the Application

- JFAC makes decisions on all the mandatory and transitional topics
- JFAC decides if the amalgamation application proceeds
- Both Councils, independently, consider the final amalgamation application prior to it being submitted
- If the application is supported by JFAC and both Councils, it will be submitted to the Province (~Sept 2021)



TIMELINE



TIMELINE CONTINUED



AMALGAMATION PROCESS
BLACK DIAMOND - TURNER VALLEY



15

PROGRESS

JFAC Decisions: To Date

1. Municipal Status: Town
2. Incorporation Date: Jan 1, 2023
3. Elected Officials Representation: 7 Councillors
4. Contiguous Border: Combined borders
5. Municipal Office: All municipal facilities will be active, main office will be the current Black Diamond municipal office

AMALGAMATION PROCESS
BLACK DIAMOND - TURNER VALLEY



16

PROGRESS

JFAC Decisions: To Date

6. Bylaws and Resolutions: No updates to bylaws / resolutions at this time
7. First Election: Q4 2022
8. Interim Council: Not required if the election is held in Q4 2022
9. Intermunicipal Collaboration Framework Extension: Confirmation of the extension already provided by the Province



FEEDBACK



- What is your greatest concern around amalgamation?
- What is your greatest hope with amalgamation?
- What do you want to know more about through this amalgamation process?



QUESTIONS & ANSWERS



Do you have any other questions?



HOW YOU CAN GET INVOLVED



Public engagement is an important component of this process. Both municipalities are committed to keeping community members informed.



Keep informed through online information with opportunities to provide feedback, ask questions and participate in events.



NEXT STEPS



AMALGAMATION PROCESS
BLACK DIAMOND - TURNER VALLEY



21

QUESTIONS? EMAIL US!

amalgamation@town.blackdiamond.ab.ca

amalgamation@turnervalley.ca

22



MORE INFORMATION:

www.town.blackdiamond.ab.ca

403.933.4348

www.turnervalley.ca

403.933.4944

23

AMALGAMATION PROCESS

BLACK DIAMOND - TURNER VALLEY

Thank You!

FOR PARTICIPATING
WE VALUE YOUR FEEDBACK



APPENDIX 2: WARD ACTIVITY PRIMER

BLACK DIAMOND – TURNER VALLEY

AMALGAMATION PUBLIC CONSULTATION QUESTION



What election format should be used to elect a council for the newly amalgamated town in 2022 if amalgamation is approved?

As part of proposed amalgamation process, the Towns have committed to engage directly with the public on specific topics. The Towns are seeking public input on what voting system the residents prefer for the 2022 election, if an amalgamation is approved.

The information provided here focuses on the election. The election format is also the format for democratic representation – how the amalgamated Town will be represented by the Councillors for their four (4) year term.

Future councils of the amalgamated municipality, if amalgamation is approved, **also have the authority to reassess the election format**. The public input requested today will inform current decisions and provide insight into long-term community expectations.

WHAT YOU NEED TO KNOW - THERE'S A CHOICE

'At Large' System of Voting

Is the same system that has always been used. A Mayor would be elected from the whole amalgamated community and the voters elect six (6) Council members from all the candidates running in the whole amalgamated community.

'Ward' System of Voting

There can be numerous options related to ward systems, but for the purpose of this exercise, it means establishing ward boundaries by dividing the amalgamated community into relatively equal areas based on population.

A Mayor would be elected by the whole amalgamated community, as is the case in the 'at large' system. Council members would be elected from each ward. The candidates must be residents of the ward they run in for at least six months. Residents of each ward could only vote for the candidates running in their ward. Every eligible resident can vote for the Mayor.

Under both 'At Large' and 'Ward' formats, the Mayor and Council all still vote on all matters related to Council.

If wards are preferred by the public and the Joint Friendship Agreement Committee (JFAC) for the potential amalgamated municipality, the specific ward boundaries will be determined by JFAC. No decisions have been made about the ward boundaries.

There are a few options for wards including:

- an east ward and a west ward;
- a north ward and a south ward; or
- a variation on these geographical areas depending on population.

NOTE - In October 2021 there will be a normal municipal election for both Black Diamond and Turner Valley in which each community will vote for their own Mayor and Council. If amalgamation is approved, there will be another municipal election in late 2022 that would elect a Mayor and Council to oversee the newly amalgamated community beginning January 1, 2023 with their term ending in October 2025 to align with all other Alberta municipal elections.

BLACK DIAMOND – TURNER VALLEY

AMALGAMATION PUBLIC CONSULTATION QUESTION



AND NOW, THE QUESTION...

If Black Diamond and Turner Valley unite under an amalgamation, what election format do you prefer?

1. At Large Representation
2. Ward Representation
If you chose ward representation, do you want a ward system?:
 - a. Only for the 2022 election as a transition stage in amalgamation
 - b. Permanently
3. I don't know

MGA REFERENCE - Division 2 Elections, Appointments and Ward System

Election of councillors 147(1) Subject to Division 5, councillors other than a chief elected official are to be elected in accordance with the Local Authorities Election Act. (2) The election is to be by a vote of the electors of the whole municipality unless the municipality is divided into wards, in which case section 148 applies.

Division of municipality into wards 148(1) Unless otherwise provided for in a bylaw under this section, when a municipality is divided into wards, (a) only an elector who is resident in the ward may vote for a councillor in that ward, and (b) councillors are elected for each ward.

LOCAL AUTHORITIES ELECTION ACT REFERENCE - Qualification of candidates

21(1) A person may be nominated as a candidate in any election under this Act if on nomination day the person (a) is eligible to vote in that election, (b) has been a resident of the local jurisdiction and the ward, if any, for the 6 consecutive months immediately preceding nomination day, and (c) is not otherwise ineligible or disqualified.

APPENDIX 3: PUBLIC EVENT #2 PRESENTATION

AMALGAMATION PROCESS BLACK DIAMOND - TURNER VALLEY **ENGAGEMENT**

Amalgamation Report Back



ONLINE PUBLIC MEETING

July 22, 2021
10:30 – 11:30am
or 6:30 – 7:30pm

INTRODUCTIONS & GUIDELINES

Guidelines:

- Be respectful
- Be open to all ideas
- Adhere to established process and timeframe
- Video / Recording

AMALGAMATION PROCESS
BLACK DIAMOND - TURNER VALLEY



2

WELCOME

What we will cover today:



BACKGROUND

- Amalgamation: 2 (or more) municipalities merge to become one
- Legislation: Municipal Government Act Part 4 Div. 5
- Amalgamation discussions and studies have occurred for many years (1988, 1992, 2005, and 2017)



BACKGROUND

- **September 2020**
 - Towns formally notify the Province that they are beginning negotiations with the intent to amalgamate
- **Amalgamation process**
 - a priority for the Joint Friendship Agreement Committee (JFAC)
 - extensive review of information and data
 - public involvement in the process
 - a final decision on whether or not to proceed rests upon the outcomes of the review



WHY AMALGAMATION?

Many reasons including:

- History of collaboration, becomes more efficient
- Maximize provincial/federal funding
- Strengthen area's economic development

Shared Objectives

1. Diversified and Resilient Economy
2. Integrated Policy Framework
3. Sustainable Service Delivery
4. Expanded Community Capacity
5. Responsive Local Governance



THE PROCESS

Data collection and Analysis

- Analysis and recommendations done through 4 subcommittees
- Subcommittees are responsible for making recommendations to JFAC

Subcommittees:

1. Finance
2. Public / Stakeholder Consultation
3. Emergency Services
4. Procedure



THE PROCESS

Finalizing the Application

- JFAC has made decisions on all the mandatory and transitional topics
- JFAC decides if the amalgamation application proceeds
- Both Councils, independently, consider the final amalgamation application prior to it being submitted
- If the application is supported by JFAC and both Councils, it will be submitted to the Province (~Sept 2021)



NEGOTIATED TOPICS

8 Mandatory Topics:

1. Municipal Name
2. Municipal Boundaries
3. Municipal Status
4. Electoral Wards
5. Council Representation
6. Location of the Municipal Office
7. Proposed Incorporation Date
8. Annexation of Land to Achieve Contiguous Boundary
9. Other Matters



NEGOTIATED TOPICS

19 Transitional Topics:

1. Interim Council
2. Interim Chief Administrative Officer
3. First Election
4. 2021 General Municipal Election
5. Appointment of Returning Officer(s)
6. Ward Boundaries Review
7. Compensation to other Municipal Authorities
8. Financial Transition
9. Interim Tax Treatment
10. Tax Treatment
11. Authority to Impose Additional Tax
12. Assessment Matters
13. Employees and Labour Agreements
14. Bylaws and Resolutions of Existing Municipalities
15. Continuation of Emergency Services
16. Library Services
17. ICF Extension
18. Utilities
19. Westend Regional Sewage Services Commission



THE ENGAGEMENT PROCESS

Public / Stakeholder Input:

- Event #1: Kick Off
- Activity #1: Electoral Wards
- Activity #2: Naming
- Stakeholder formal request for feedback
- Ongoing public questions and input by email/phone
- Event #2: Reporting Back

What We Heard Reports:

- All input collected and reported back to the public, JFAC, and Municipal Affairs
- Subcommittees and JFAC consider input

AMALGAMATION PROCESS
BLACK DIAMOND - TURNER VALLEY



11

TIMELINE



AMALGAMATION PROCESS
BLACK DIAMOND - TURNER VALLEY



12

TIMELINE CONTINUED



AMALGAMATION PROCESS
BLACK DIAMOND - TURNER VALLEY



13

GENERAL PROGRESS

Subcommittees Update

1. Finance

Analysis and recommendations complete: 9 topics

2. Public / Stakeholder Consultation

Engagement activities and recommendations complete: 3 topics

3. Emergency Services

Analysis and recommendations complete: 1 topic

4. Procedure

Analysis and recommendations complete: 10 topics

All
recommendations
complete

AMALGAMATION PROCESS
BLACK DIAMOND - TURNER VALLEY

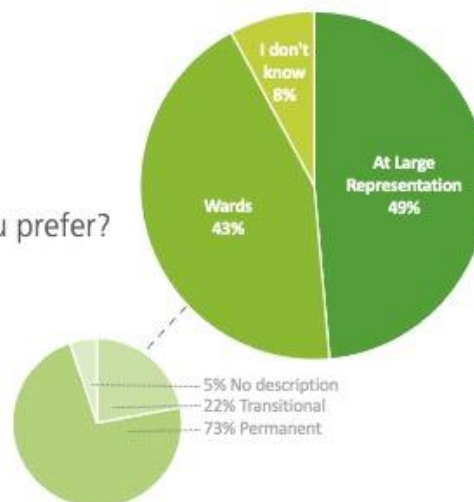


14

ENGAGEMENT OUTCOMES

Electoral Ward Activity

- Online survey - Over 175 participants
- What electoral representation system would you prefer?
 - At Large Representation
 - Electoral Wards
 - I don't know
- A second question asked, should wards be:
 - Transitional or
 - Permanent



Result: At Large Representation

AMALGAMATION PROCESS
BLACK DIAMOND - TURNER VALLEY

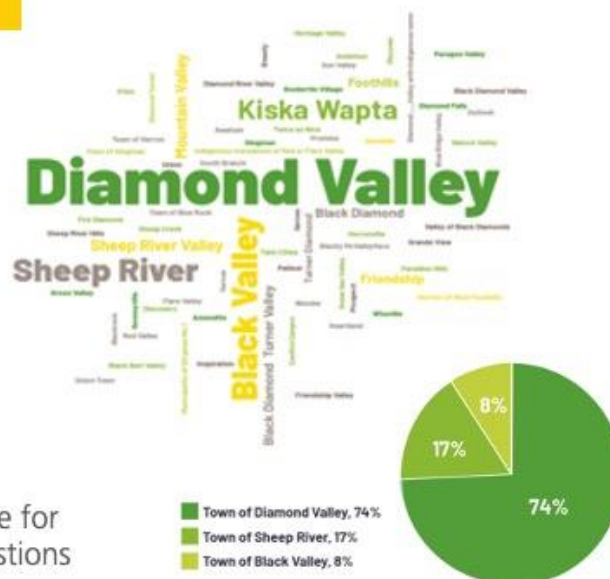


15

ENGAGEMENT

Naming Activity

- Phase 1: Over 200 name suggestions
- 70 unique names proposed
- Top 3 suggestions:
 - Town of Diamond Valley
 - Town of Sheep River
 - Town of Black Valley
- Phase 2: Over 1100 responses
- Online survey asked participants to vote for their favourite name from top 3 suggestions



Result: Town of Diamond Valley

AMALGAMATION PROCESS
BLACK DIAMOND - TURNER VALLEY



16

ENGAGEMENT

- All public input (engagement activities, engagement events and questions submitted through Town websites) are included (summaries and verbatim) in the What We Heard Report found on both Town websites
- The WWHR will be updated after this event
- Where possible, public questions are answered in the FAQ
- Find updates online at both Town websites in the Public Information Paper (PIP)



FINANCE

- Finance Subcommittee reviewed:

Municipal Debt
and Reserves

Assessment
and taxation

Operating
revenues and
expenditures

Capital
Plans/Asset
evaluation
review

Costs,
Savings,
Funding



FINANCE

Overall Recommendation:

- Both Towns in good financial standing
- Towns are similar to each other in financial respects
- No red flags on financial issues

You can find detailed information and comparisons in the **Finance Report to the Public**



FINANCE - Municipal Debt

- Long-term debt is used to support infrastructure upgrades, equipment, and buildings.
- Debt cannot be used for any municipal operations
- Operating revenues continue to support existing debts of both Towns before and after amalgamation.

Long-Term Debt	Principal Balance 2021	Principal Balance 2022	Principal Payments 2022	Interest Payments 2022
Town of Black Diamond	\$ 611,337	\$ 519,586	\$ 97,113	\$ 26,585
Town of Turner Valley	\$ 1,447,438	\$ 1,330,989	\$ 120,199	\$ 48,017
Variance	\$ 836,101	\$ 811,403	\$ 23,086	\$ 21,432

Finance Report p.6-7

FINANCE - Reserves

- Both municipalities have **dedicated capital reserves** for specific projects – these remain until utilized.
- Both municipalities will equally contribute to the operational reserve of the new municipality.

Reserves as at December 31, 2020	Operating Reserves	Capital Reserves	Offsite Levies	TOTAL
Town of Black Diamond	\$ 3,124,245	\$ 5,624,139	\$ 1,147,151	\$ 9,895,535
Town of Turner Valley	\$ 1,337,821	\$ 3,358,070	\$ 1,469,911	\$ 6,165,802
Variance	\$ 1,786,424	\$ 2,266,069	\$ 322,760	\$ 3,729,733

Finance Report p.6-7

AMALGAMATION PROCESS
BLACK DIAMOND - TURNER VALLEY



21

FINANCE - Assessment and Taxation

With incorporation date of January 1, 2023:

- Current mill rates are similar and new rates will be set in early 2023, so no need to treat property taxes differently
- No interim tax treatment needed

For previously annexed properties:

- Black Diamond annexed lands from Foothills County in 2020 to create a contiguous border with Turner Valley
- Assessed and taxed as if in Foothills County until a triggering event

Note

Find more in the Finance Report to the Public on **pages 4 and 5**.

AMALGAMATION PROCESS
BLACK DIAMOND - TURNER VALLEY



22

FINANCE – Operating Revenues and Expenditures

- Both Towns have similar revenue and operating costs
- Comparison with similar sized municipalities:
Didsbury and Redcliff
- Combined expenses of Black Diamond and Turner Valley are in line with similar-sized comparisons
- **Found nothing of significant concern**

Note

Find more in the Finance Report to the Public on **pages 2 and 3**.



FINANCE – Capital Plans/Asset Evaluation Review

- Assets of both Towns compared:

	Black Diamond	Turner Valley
10 Year Capital Plan Total Value	\$38,216,985	\$28,404.150
Average Age of Assets	9.1 Years	15.8 Years
Remaining Useful Life of Assets	20.9 Years	15.3 Years

- Most significant deficit is roads
- Assessment to be completed upon amalgamation
- 10-year capital plan will assist in comparing priorities and planning for the future

Note

Numbers are based on financial age. Capital plans and assets are detailed in the Finance Report to the public on **pages 7 and 8**.

Find more in the Finance Subcommittee JFAC report.



FINANCE - Savings

Decisions made through the amalgamation process that will result in reduced costs include:

- A seven-member Council – reduction of seven elected officials.
- One CAO – reduction of one CAO
- Reduction in administrative costs by eliminating redundancies between the two Towns including, but not limited to:
 - Financial audit
 - IT – software
 - IT – hardware
 - Office equipment

Estimated ~\$370,000 annual savings

	Pre-Amalgamation	1-3 months	1-2 years	Long Term Annual Savings
Administrative		\$20,000	\$27,000	\$20,000
Council & CAO		\$350,000	\$350,000	\$350,000
Grants	\$282,500	*	*	*
Organizational Restructuring			*	*
Total	\$282,500	\$370,000	\$377,000	\$370,000

* Information not available at this time

Note

Estimated costs and savings are detailed in the Finance Report to the Public on pages 9 and 10.

AMALGAMATION PROCESS
BLACK DIAMOND - TURNER VALLEY



Turner Valley

25

FINANCE - Costs

Upon amalgamation, a service level review will be conducted, and the organizational structure will be assessed to determine and identify the requirements for the amalgamated town

Estimated:
~\$1,620,000 in one-time costs
~\$375,000 are past expenses*

*this includes past costs such as the 2017 feasibility study

Finance Report p.9-11

Estimated **one-time** costs of amalgamation including branding, moving, merging and other costs:

	Pre-Amalgamation	1-3 months	1-2 years	Long Term Annual Savings
Branding	\$10,000	\$64,300	\$18,500	\$25,000
Merging	\$75,000	\$103,500		
Move		\$100,000	\$50,000	
Consultants	\$334,000	\$125,000	\$175,000	
Legal		\$25,000	\$175,000	
Banking	*			
Council	\$40,000			
Staff			*	
Other	\$25,000	\$25,000	\$25,000	\$25,000
Planning			\$100,000	\$100,000
Total	\$484,000	\$442,800	\$543,500	\$150,000

* Information not available at this time

AMALGAMATION PROCESS
BLACK DIAMOND - TURNER VALLEY



Turner Valley

26

FINANCE - Funding

- Policing: The new municipality could recognize savings of **\$25,543 per year** under new policing funding model
- Alberta Community Partnership grant to cover transition costs - eligible for **\$1,200,000** based on the following streams:
 - Transition Stream - base amount of \$100,000 plus \$500 per capita – to a max of 300 persons for a total of \$250,000
 - Debt servicing/Infrastructure Stream– base amount of \$500,000 plus \$1,500 per capita - to a max of 300 persons for a total of \$950,000

Note

Numbers are based on current information and funding model. Find funding information in the Finance Report to the Public on pages 12 and 13.

AMALGAMATION PROCESS
BLACK DIAMOND - TURNER VALLEY



27

FINANCE

Both Towns have contractual agreements with Foothills County to be continued by the new amalgamated municipality:

- Black Diamond is committed to \$22,154 annually until 2024 for annexation
- Turner Valley is committed to \$10,000 annually until 2030

Local Improvement Levies remain with Turner Valley until paid in full:

- Turner Valley uses Local Improvement Levies for payment of larger construction projects that benefit specific residents
- 10 Local Improvement Levy bylaws
- Black Diamond Does not utilize Local Improvement Levies

Note

Find more in the Finance Report to the Public on pages 4 and 5.

AMALGAMATION PROCESS
BLACK DIAMOND - TURNER VALLEY



28

OVERVIEW OF RECOMMENDATIONS

JFAC Decisions: All topics completed

1. Municipal Name: Town of Diamond Valley
2. Municipal Boundaries: Same as current
3. Municipal Status: Town
4. Electoral Representation: At Large
5. Council Representation: 7 Councillors
6. Municipal Office: All municipal facilities will be active, main office with be the current Black Diamond municipal office
7. Incorporation Date: Jan 1, 2023



OVERVIEW OF RECOMMENDATIONS

JFAC Decisions: All topics completed

8. Contiguous Border: Combined borders
9. Other Matters:
 - Costs and Savings analyzed by Finance Subcommittee
 - Utilities: No change to rates until new bylaw is established
 - Westend Regional Sewage Services Commission: Commission to create a bylaw for disestablishment and set timeframe
10. Interim Council: Not required if the election is held in Q4 2022
11. Interim CAO: Current CAO of Turner Valley, Shawn Patience; Current CAO of Black Diamond, Sharlene Brown as secondary option
12. First Election recommendation: November 28, 2022



OVERVIEW OF RECOMMENDATIONS

JFAC Decisions: All topics completed

13. 2021 General Election: No change to current election timeline
14. Returning Officer: Current Returning Officer of Black Diamond, Verna Staples
15. Ward Boundary Review: Not required – At Large Representation
16. Compensation to other municipalities: New municipality to continue payment for previous contractual agreements with Foothills County
17. Financial Transition: Independent audits to be conducted for year end 2022
18. Interim Tax Treatment: Not required



OVERVIEW OF RECOMMENDATIONS

JFAC Decisions: All topics completed

19. Tax Treatment (previous annexations): Annexed lands will be taxed as if in the County of Foothills until a triggering event
20. Additional Tax (to service pre-amalgamation debt):
 - operating revenues continue to support debts
 - designated capital reserves remain with the towns
 - ten-year capital plan to be used to assess priorities
21. Assessment: No change to property assessments
22. Employees and Labour Agreements: All current employees will become employees of the new municipality until service levels and organizational structure is determined



OVERVIEW OF RECOMMENDATIONS

JFAC Decisions: All topics completed

- 23. Bylaws and Resolutions: No updates to bylaws / resolutions at this time
- 24. Emergency Services: Current service levels will be maintained until service levels and organizational structure is determined
- 25. Library Services: Continuation of services
- 26. Consultation: Engagement Activities and recommendations complete
- 27. Intermunicipal Collaboration Framework Extension: Confirmation of the extension already provided by the Province



NEXT STEPS

01
Report Generation
Now-Aug 25

02
JFAC Review &
Recommendation
Aug 25

03
Council Decision
Aug 30-Sep 10

04
MA Submission
Sept 15



QUESTIONS & ANSWERS



Please submit questions through chat

AMALGAMATION PROCESS
BLACK DIAMOND - TURNER VALLEY



35



QUESTIONS? EMAIL US!

amalgamation@town.blackdiamond.ab.ca

amalgamation@turnervalley.ca

36



MORE INFORMATION:

www.town.blackdiamond.ab.ca

403.933.4348

www.turnervalley.ca

403.933.4944

37

AMALGAMATION PROCESS

BLACK DIAMOND - TURNER VALLEY

Thank You!

FOR PARTICIPATING
WE VALUE YOUR FEEDBACK



APPENDIX 4: ADDITIONAL PUBLIC RESPONSES

A deadline of August 6, 2021 was established for public responses to be captured in the What We Heard Report. Both the Towns of Black Diamond and Turner Valley advertised the August 6 deadline on their websites and social media nine (9) days prior on July 29, 2021. Responses submitted after the deadline continued to be collected and read by Council and are included here.

Note: for the purpose of this report, names posted in the responses are shown as xxxxx.

The JFAC Amalgamation Report as outlined on the respective Town websites demonstrates once again, the significant work and resource effort required to study and evaluate amalgamation.

After reviewing the report the following items stand out:-

1. The caveat at the bottom of page 1, that no safeguards to protect the recommendations can be established and that all recommendations can be undone.... suggests an unreliable and unstable go forward plan? Why proceed unless a significant financial case and public relations case and employee satisfaction and retention case can be made against this caveat? The Amalgamation Report as structured looks to lack the strength of a case required.
2. The financial analysis is not complete and no JFAC decision seems to have been made ? The reserves vs capital plans have significant gaps re financing the gaps Will it be borrowing and how does that factor in? In addition, the TCAS seem to have missed the water and sewer distribution line life status.... these assets are not covered under Westend or SRRUC They are equally as compelling as the road infrastructure stated issue. Suggest these are major liability and supply concerns A number of red flags .
3. The state of the employee culture and moral is not addressed and will play a significant role in making a merger of two organizations a success or an overwhelming and distracting failure. Given the Covid pandemic and the stressful impact on the employees and public, the timing of another stressful change via amalgamation is missing in the report . In addition, the turnover in staff and in particular, Turner Valley, creates a poor environment for more change and a competency concern to manage such significant change . Have JFAC commissioned an employee survey for consideration ? A red flag here is employee retention and attraction going forward.

xxxxx

Turner Valley

August 12, 2021
Re: Amalgamation

Dear Mayor and Council,

As a Black Diamond resident and taxpayer for the past 18 years, I wish to express my concerns about the Black Diamond/Turner Valley amalgamation. My biggest concern in general is that no-one knows the answers to all the questions being asked. I am worried about moving forward with this when we don't really know what the outcomes will be. There are too many assumptions being made and a lot of conflicting information.

I wish I could completely understand what the motivating factors are. I know "cost savings" gets bantered around a lot, but with nothing concrete to support it. I am concerned that this is little more than an assumption. I think many residents are expecting their property taxes to go down, but I personally doubt that will be the case. I am concerned that few people are expressing opposition to amalgamation simply because they anticipate all outcomes to be positive. I worry about the disharmony that could result down the road when they realize their hopes have not been realized. They will feel like they have been duped and will be disgruntled and distrustful. I also feel bad for the large portion of older residents who were excluded from participating in the survey due to the technical nature of it being hosted online.

With regards to address changes, the information that has been floating about is quite conflicting and answers seem flippant. It seems no-one can say for sure whether/when/how residents of Turner Valley and Black Diamond will need to change their addresses and who will be responsible for the costs associated with that. Again, there was talk of "potentially" getting grant money for it, but no guarantees. Same goes for the policing grant, how far will that grant take us? Is it only a one-time grant or can we expect continued savings in this department?

Some very significant questions remain unanswered. If savings truly are to be had, how far down the road will it be before we start to see it? How much can the towns expect to save? And on what items in particular? Is it prudent to just blindly move ahead with amalgamation without having clear and solid answers to these questions?

I, myself, originally felt that amalgamation would resolve a lot of the conflict between the two towns and allow us to function much more efficiently and cohesively, but now I'm concerned about the cost this will come at. Is it really worth it? And I'm not convinced at this point that amalgamation won't just add fuel to the fire that has already started.

Sincerely,

xxxxx
Black Diamond Residents

July 23, 2021 *Received as email response on August 12, 2021

Mayor & Council
Town of Black Diamond
Box 10
Black Diamond, AB
T0L 0H0

Dear Mayor & Council,

Re: Strong Objection to Possible Amalgamation with the Town of Turner Valley

This letter serves as notification of our family's strong objection to the possible amalgamation with the Town of Turner Valley. We have absolutely no desire whatsoever to be amalgamated with Turner Valley, and feel that this is being pushed through against the wishes of the majority of Black Diamond residents. You only have to pay attention to what is being said on social media and by whom for evidence of that fact! Although people elect their Council to act on their behalf in their best interest, the majority of people don't feel this is happening in this case. A decision of this magnitude should have gone to a plebiscite {whether it's binding or not}, so that people's wishes were known before proceeding with something as important as amalgamation.

We have lived here for many years and have a very large circle of family and friends in these two towns and not one of them, from either town, is in favor of amalgamation. No one is in favour of losing our individual town names either. We bought our home in Black Diamond for a reason! If we wanted to live in the neighbouring town, we would have bought our home there but we don't and we didn't, and we didn't buy our home in "Diamond Valley" either! Most people here completely resent the fact that this is being pushed upon us against our wishes!!

People from both towns specifically do not want to lose our individual town names, and do not want to change their addresses. Even though some council members from the neighbouring town are saying otherwise on social media, having a new "town" name means that we will all have to change our addresses everywhere, and there are costs associated with doing so. It is very clear that this is NOT something that people from either town want. There has been so much concern about, and opposition to, this particular issue in the community and on social media that you cannot deny that this is something people do not want. Having the names as "subdivisions" of the new town means nothing! Let's face facts here! Once you lose your town name and lose that "spot on the map", you fade away into obscurity and your individual histories are eventually lost! I urge Council not to let this happen to our vibrant little town by amalgamating it with Turner Valley into a new entity.

You are trying to tell us that there will be savings realized here, but we all know that's simply not true! One-time amalgamation costs to combine communities will be in the millions. Grants for costs such as policing are shortlived and cannot be counted on in future years, nor is it showing substantial savings anyway. Most other services are already being shared, so no cost savings will be had there either. You tell us costs will be realized through a reduction in staff, yet there will be twice as much work when combining two communities and you cannot expect half the staff to do twice as much work {not to mention that "overtime" wage costs would be huge}, so reducing staff would be difficult.

You also cannot expect staff members to stay on to help you through the "nightmare" that amalgamation would be, only to lay them off afterward! This is the quickest way to lose valuable staff with corporate memory! The Town of Black Diamond has always had a staff of loyal, mostly long-term employees who have important historical institutional memory for the Town. The same cannot be said for our neighbours across the pond who (according to a recent article in the Okotoks Western Wheel} have had 11 CAO's in 11 years, and almost as much staff turnover.

.. ... Page 2

The fact that much of the required Public Consultation on Amalgamation was done on line is also not sitting well with many residents, especially since the Covid restrictions were lifted on July 1. By doing this whole process online, so many people were excluded from the Public Consultation process since many people were unable to access the on line process for various reasons. Having an on line "survey" for the voting system and for the new town name was a pretty poor method of Public Consultation in our opinion.

Another concern with amalgamation is that the "At Large" system of voting was selected (and by very few votes). This would be very unfair to whichever community had the fewer number of members elected to Council. One community would be "favoured" over the other, which would create even more division and animosity within the new "town" entity than what already exists between residents of the two towns. This is what happens when voting is done via "online surveys" instead of by a plebiscite. All of these questions (do you want to amalgamate, new town name, voting system) could have gone to plebiscite at the next municipal election (with no amalgamation application being submitted until after peoples' wishes were known).

In all of our 60+ years here in this community, we have NEVER seen as much animosity between residents of the two towns as what currently exists, entirely due to these amalgamation talks! People are being downright nasty to each other, a blatant indication that this is not what the people want! People clearly don't want this amalgamation to happen, and it is time to take the blinders off and pay attention to what is going on here, and how much opposition and resentment exists toward it.

Have you not noticed the differences between the two towns business districts and main streets lately? Black Diamond residents should not have to lose our town name and unique identity to be the lifeline for another town! Most of the people we know don't view this amalgamation as being beneficial to Black Diamond at all. In fact, we are hard-pressed to come up with a single good reason for it! Unless our property taxes will be significantly reduced (which you can neither prove nor guarantee), there is absolutely no benefit to the average homeowner to amalgamate. For the most part, people seem to be happy with the way things are, and if it works, don't mess with it! We wish to live in Black Diamond, NOT Diamond Valley!!!

We would urge Council to please reconsider your position on amalgamation with the Town of Turner Valley. The residents of Black Diamond elected you in good faith to do what's in our best interest, and amalgamating with Turner Valley is clearly not in our best interest! You are our voice, and our voices are telling you that the majority of Black Diamond residents are opposed to this amalgamation. Please put your personal agendas aside and listen to your residents!

Thank you for your consideration of our concerns.

Yours truly,

xxxxx

Black Diamond, AB

cc. The Honourable Ric Mciver, Minister of Municipal Affairs
Office of the Minister Municipal Affairs
132 Legislature Building
10800 - 97 Avenue
Edmonton, AB
TSK 2B6

August 15/2021

To - Black Diamond Town Council
CC to Rick McIver



Hi there,
we are writing to voice our opposition to the amalgamation of Black Diamond & Turner Valley. Lots of questions need to be asked, like how much debt does each town have. If one town has a bigger debt than the other town, who pays the difference. What will it cost to amalgamate.?? As a Black Diamond resident & taxpayer, we don't want to be on the hook for dealing with contaminated soil & mess of pipelines under the roads & properties in Turner Valley.

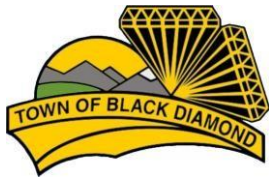
A few years ago we had a vote on amalgamating. What part of NO can't people understand ??? Why bother to vote if nobody is going to listen anyway? Turner Valley doesn't even have a bank. Isn't it interesting that 2 new businesses (fast food) have just BOTH chosen Black Diamond to set up shop. I have lived in this area for 81 yrs & have watched these 2 towns grow. Leave things alone. We are doing just fine!!

Disgruntled Taxpayers

XXXX

APPENDIX 2

Frequently Asked Questions (FAQ)



Amalgamation

Frequently Asked Questions (FAQs)



INTRODUCTION.....	3
ENGAGEMENT PROCESS	3
CONSULTATION.....	3
NAMING.....	5
ELECTORAL WARDS	6
REPORTING BACK	6
AMALGAMATION PROCESS	7
GENERAL	7
WORKING COMMITTEES.....	7
POST-AMALGAMATION MODEL	8
HUMAN RESOURCES AND TOWN FACILITIES	8
STAFFING.....	8
COUNCIL	9
CAO.....	10
TOWN FACILITIES	10
EMERGENCY SERVICES.....	11
POLICING & RCMP	11
COMMUNITY PEACE OFFICERS / MUNICIPAL ENFORCEMENT	14
OTHER EMERGENCY SERVICES.....	14
FINANCE	15
FINANCIAL IMPLICATIONS OF AMALGAMATION.....	15
TAXATION.....	20
GRANTS	21
AMALGAMATION COSTS	22
DEBT	25
INFRASTRUCTURE	26
ELECTIONS	28
DEPARTMENTS / BYLAWS.....	29
FCSS	29
ECONOMIC DEVELOPMENT	29
GENERAL QUESTIONS	30

ADDRESSING – POSTAL IMPLICATIONS30

ANNEXATION/BOUNDARIES/MAP31

REGIONAL.....31

SPECIAL MUNICIPALITY.....32

INTRODUCTION

All amalgamation-related public input is being collected and tracked. You can view a detailed overview of all input (top themes and verbatim) in the What We Heard Report, found on Town websites. To date, all emails submitted through the Town websites, questions and comments from the public kick-off event, and related online survey results have been included in this report.

For this FAQ, the input has been themed into the most frequently asked questions and is broken down into subthemes with sample questions submitted by the public. Where possible, the Towns will provide responses to questions. If themes have been identified and can't be responded to at this stage, this will also be indicated. Further input will continue to be included in the FAQ and updated responses will be posted once available for the duration of the amalgamation review process. **New material added to the FAQ will be shown in green font at the time of addition.**

ENGAGEMENT PROCESS

Consultation

Why was there not a vote on this amalgamation?

Will there be a referendum to approve or to reject the amalgamation? If not, why not?

A referendum or public vote is not required by the Province as part of the amalgamation process. Councils chose to proceed with a thorough amalgamation review process that includes public input and involvement throughout. Public input will be an important consideration as to whether amalgamation proceeds, alongside a review of all items required by Municipal Affairs to be included with the Towns' application.

The prospect of amalgamation between Black Diamond and Turner Valley has been a matter of considerable discussion for many years, culminating in the 2012 Friendship Agreement where the municipalities, after much consultation with the public, committed to working more closely together through the Joint Friendship Agreement Committee (joint committee of both Councils). The Amalgamation Feasibility Study (2017) also undertook a comprehensive survey with residents from both Towns to better understand public sentiment around amalgamation, particularly shared services.

For many years, the overall goal for both municipalities has been to promote collaborative relationships and shared services between the two communities. Both Councils decided to take amalgamation to the next level and review through a formal process due to the lengthy history around amalgamation discussions, the strong history of collaboration between the

two neighbours, and the many potential benefits of amalgamation. Through a thorough review process, the municipalities will know, more definitively, if amalgamation makes sense or not.

The amalgamation review process is outlined by the Province and is quite technical in nature. Council reviewed the negotiation list and determined that two topics were ideal for direct public input, Electoral Wards and naming of the potential new community. However, the Joint Friendship Agreement Committee is considering all input provided by the public throughout the process. As part of the final **'What We Heard' Report** (all community input themed and verbatim) will also include a What We Did section that will overview how public comments influenced amalgamation related decisions.

Councils are also dedicated to transparency throughout the review process. The websites for both Towns have a dedicated amalgamation page with up-to-date information on process, timeframes, engagement opportunities, and progress to date. All input is collected and shared back with the communities. The information and material that is being reviewed by the Joint Friendship Agreement Committee will also be shared with the communities. The intent is to have the community as informed as possible regarding the decisions being made.

I heard the term "Potential" Amalgamation. Can you confirm the meaning of this?

- Both Councils entered amalgamation negotiations with the intent to amalgamate. However, a final decision on whether to proceed with the application will not be made until a thorough review of all related data and material takes place.

Why do you think it will pass now, compared to previous attempts??

Both Councils believe that success in one community is a success for the whole. As a result, Black Diamond and Turner Valley Councils feel it makes more sense to come together than to stay apart for many more specific reasons:

- There is a strong history of collaboration between the two Towns that has produced positive results. These positive results take a significant amount of intermunicipal coordination, dialogue, and in some cases, duplication of effort. Now is the time to remove obstacles, streamline processes, achieve faster results, and strive to be as efficient and effective as possible in reaching shared goals.
- Provincial and Federal grants and funding will be reduced significantly in upcoming years. Through amalgamation and with a combined tax base, Black Diamond and Turner Valley will be able to maximize access to funding support and ultimately do more with the money received.
- Through amalgamation, there is an intent to continue to strengthen the area's economic development initiatives. A seamless approach will bolster local economic development with less duplication and direct competition. Both Councils want the communities to thrive in the

short and long term. Working together to ensure a healthy and diverse economy is key to making this a reality.

- Attracting the development industry is also important to the community's long-term sustainability. A united municipality will allow for comprehensive long-term and prioritized land and infrastructure planning.
- One municipality will provide efficiencies in roles and responsibilities, requiring only one CAO and one Council. This streamlines decision-making, expedites timelines and provides a focused central approach.
- Until now, amalgamating would have created significantly more costs to policing. With the recent changes to the provincial funding model, this is no longer the case. Additional policing costs are now being downloaded to both municipalities regardless of amalgamation, but a population increase to over 5,000 would trigger a grant opportunity to offset any additional costs.
- A united municipality will create a single, larger entity providing a greater presence in representing the entire regional community and a stronger unified voice in discussions with the provincial government, industry, and neighbouring municipalities.
- Where possible and where it makes sense economically, more effective and efficient delivery of municipal services will be explored to ensure the level of service meets the expectations of the residents.

(from Public Information Paper, page 7)

Naming

Please advise if a new name has been determined for the combined towns of Turner Valley and Black Diamond. How will naming be determined? By whom? How?

Will the Towns lose their provincially distinctive history?

- **UPDATED:** The naming of the new Municipality went through significant public engagement. The Naming Activity ran from May 19 - June 6, 2021 and saw a response of over 150 emails with over 220 suggestions for potential names for the newly amalgamated Municipality, resulting in 70 unique names. **The submissions were short listed to the top three submitted names (The Town of Black Valley, the Town of Sheep River and the Town of Diamond Valley). The results indicated Diamond Valley to be the clear preference at 74%. The proposed new name of the incorporated Municipality is the Town of Diamond Valley. Further details can be found on Town websites and the full report can be found at:**

[Black Diamond](#)

[Turner Valley](#)

Electoral Wards

Preference is for non-ward representation but I understand that decision is in the future.

- **UPDATED:** Based on the public engagement processes, an “**Election At Large**” electoral system has been recommended. Final results: 49% of participants chose ‘at large’ electoral representation, 44% of participants chose ‘wards,’ and 8% indicated they did not know. The full report can be found at:

<https://blackdiamond.civicweb.net/filepro/documents/57426?preview=60744>

[https://turnervalley.civicweb.net/document/55758/2021.06.08%20Procedure%20Recommendations%20to%20JFAC%20\(002\).pdf?handle=D1DAD42C42674705A27BD778FFE6D6D9](https://turnervalley.civicweb.net/document/55758/2021.06.08%20Procedure%20Recommendations%20to%20JFAC%20(002).pdf?handle=D1DAD42C42674705A27BD778FFE6D6D9)

- Electoral representation was determined through a public engagement activity held throughout May 2021. Community members were provided with an information sheet on ‘Election at Large’ or ‘Ward Representation’ and asked to indicate their preference. Citizens were also encouraged to research what they feel might be pros and cons to help form their opinion. The Joint Friendship Agreement Committee supported the preference of the public. Details on the ward activity can be found on the Town websites:

<https://www.town.blackdiamond.ab.ca/553/Proposed-Amalgamation>

<https://turnervalley.ca/proposed-amalgamation-updates/>

Reporting Back

Will the results of the three relevant amalgamation questions be posted? If so, when will the results be available? Is there a place to see posted amalgamation questions?

- All public input, including the survey questions, can be found in the **What We Heard Report** on both Town websites. This report includes all public input collected through the Town websites, the public kick-off event and related online survey and has been reviewed and themed with the intent to provide a high-level pulse of what input was provided or questions asked the most often. All questions and comments are also provided verbatim at the end of the report. The most frequently asked questions found throughout this input are being addressed, where possible, in this FAQ.

AMALGAMATION PROCESS

General

Has the amalgamation committee set defined targets or measures to determine if amalgamation is a good decision for both communities?

- No defined targets have been set. The Joint Friendship Agreement Committee has established a Process Charter for the amalgamation negotiations which set the parameters for how the Committee and all Sub-committees will conduct amalgamation related activity.
- The Sub-committees (made up of Council and Administration representation) establish what information and materials are necessary to conduct a thorough review and ensure adequate resources and expertise are available.
- It is expected that the amalgamation review will identify areas of potential benefit and potential risk as part of the process.

What initiatives have been "stalled" due to amalgamation talks?

- Council and Administration in Black Diamond have a strategic plan, and some of the initiatives have been placed on the back burner for the time being. There is also work that continues, but it is at a slower pace. Examples of these are:
 - More robust marketing of economic development event fund grants.
 - Public gathering spaces and day-use area public engagement.
 - Public education on water consumption to assist with the goal to decrease individual usage.
 - Research on an organic program and phasing out of larger garbage bins.
- In Turner Valley, service level reviews have been deferred until the outcome of the amalgamation process has been determined. Intermunicipal Collaboration Frameworks (ICFs) with Foothills County and the Town of Black Diamond have also been put on hold pending the outcome of the process.

Working Committees

Are Amalgamation Sub-committee members both elected officials and town residents?

How does a member of the public get involved in an amalgamation committee?

- Sub-committees are comprised of elected officials and staff. Town residents do not participate in the sub-committees but have the opportunity to participate in public engagement sessions.

Post-Amalgamation Model

Can the towns provide residents with a possible post-amalgamation model from historical information without a costly consultation process?

Please provide a snapshot of how blended services would look, as well as Council and administrations? People are looking to see what it might look like from a 100-foot level.

- The amalgamated Town would be comprised of a Council of one (1) mayor, six (6) councillors, one (1) CAO, managers and staff. This is similar to standard municipal organizational structures for towns across Alberta.
- **UPDATED:** The Amalgamation Negotiation Report will include a statement, as referenced in JFAC motion 21 05 12 02, that all employees at the time of amalgamation will become employees of the new municipality to ensure uninterrupted service delivery until such time as the CAO, in conjunction with the Council elected in 2022, have determined service levels and organizational structure:
<https://blackdiamond.civicweb.net/filepro/documents/57590?preview=60845>
- It is difficult to provide a forecast of a Town model because the Council elected in late 2022 (should amalgamation be approved), supported by a new CAO, will ultimately be responsible for decisions such as budget allocations, service levels, staffing requirements, as well as all combined infrastructure, facilities and equipment assets. These decisions are not known now and cannot be speculated.

HUMAN RESOURCES AND TOWN FACILITIES

Staffing

What happens to the staff in Turner Valley or Black Diamond as it is obvious that doubling up on staff will necessitate reductions?

- There will be a reduction of one CAO.
- A service level review will be conducted by the new municipality's Council and CAO. The results of the service level review will guide an organizational structure assessment to determine and identify the optimal requirements for the amalgamated town.
- **UPDATED:** All employees at the time of amalgamation will become employees of the new Municipality to ensure uninterrupted service delivery until such time as the CAO, in conjunction with the Council elected in 2022, has determined service levels and organizational structure.

Will the number of FTE staff positions be reduced post-amalgamation? In other words, will the number of employees in both towns be reduced? If yes, what percentage of staff will be made redundant. Will the only reduction in "staffing" costs be the elimination of 7 councillors and one CAO?

- The amalgamated Town would be comprised of a Council of one (1) mayor, six (6) councillors, one (1) CAO, managers and staff. This is similar to standard municipal organizational structures for towns across Alberta.
- The Amalgamation Negotiation Report will include a statement, as referenced in JFAC motion 21 05 12 02, that all employees at the time of amalgamation will become employees of the new municipality to ensure uninterrupted service delivery until such time as the CAO, in conjunction with the Council elected in 2022, have determined service levels and organizational structure
<https://blackdiamond.civicweb.net/filepro/documents/57590?preview=60845>
- It is difficult to provide a forecast of a Town model. The Council elected in late 2022 (should amalgamation be approved), supported by a new CAO, will ultimately be responsible for decisions such as budget allocations, service levels, staffing requirements, as well as all combined infrastructure, facilities and equipment assets. These decisions are not known now and cannot be speculated.

Could both Councils not even start to prepare some “recommendations” to the new DB Council?

A service level review will be conducted by the new municipality’s Council and CAO. The results of the service level review will guide an organizational structure assessment to determine and identify the optimal requirements for the amalgamated town.

Council

Why was it decided there would be one mayor and six councillors? Why not one mayor and four councillors?

How many Councillors and town employees will be released?

- At the November 19, 2020 Joint Friendship Agreement Committee negotiating meeting it was agreed by both Councils that the application to amalgamate would include seven (7) elected officials to represent the newly formed municipality upon its incorporation - six councillors and a mayor. This is the standard elected structure for municipalities that fit “Town” status. This number is also in line with recommendations of the Act (Municipal Government Act RSA 200 Chapter M-26 Part 5 Division 1 s. 143(1) - Number of councillors for municipalities) where it states “The council of a city or town consists of 7 councillors unless the council passes a bylaw specifying a higher or lower odd number.”

- The amalgamation will result in a reduction of seven (7) elected officials instead of the fourteen (14) (between the two individual municipalities). For the response to the staff portion of this question, see the response under Staffing.

Your web says \$2000000 savings for cutting a council. Black Diamond budget says cost of council is around \$130000. Where is the difference

- Costs and Savings, as indicated in the Financial Report, were established by averaging and estimating both the Council wage budget line items for honorariums.

Since the Council will have more residents to tend to, how much more will their salary be?

- Council pay will be determined by the new municipality's Council. Council conducts an annual review of the Council Remuneration policy.

Current information:

[Black Diamond Council Remuneration Policy](#)

[Turner Valley Council Remuneration and Reimbursement Policy](#)

CAO

How will we decide who would continue as CAO?

- The Amalgamation Negotiation Report will include a recommendation from JFAC naming an interim CAO.
 - **UPDATED:** Shawn Patience will be named in the Amalgamation Negotiation Report as Interim CAO, and Sharlene Brown be included as a secondary option for Interim CAO.
- The name of the individual must be provided no later than the Province drafting the Order in Council to approve the amalgamation. The permanent CAO will be selected by the new Council of the amalgamated town after January 1, 2023.

Town Facilities

Will one of the existing town hall buildings be sufficient to house the amalgamated town's needs? Will a new building be needed? Cost?

- A new municipal town hall building is not currently being considered. The existing Black Diamond Town office will be the main municipal centre, with the expectation that all current municipal facilities will be required.

EMERGENCY SERVICES

Policing & RCMP

When will the residents of Turner Valley and Black Diamond begin to pay for policing?

- Before April 2020, only municipalities over a population of 5000 had to pay for a portion of the policing costs, usually through a system of municipal contracts with the RCMP.
- As of April 1, 2020, the Province of Alberta mandated all municipalities, no matter the size, pay a portion of the cost of RCMP policing.
- Both Towns expect to start paying for policing when invoiced in 2021. Both Towns have budgeted for the expected costs (see table below).
- The [Police Funding Regulation Information Sheet](#) provides additional information.

How much will the RCMP cost with and without amalgamation?

Without amalgamation	~\$333,000 for both municipalities
With amalgamation	~308,000 for the new amalgamated municipality

Detailed explanation below:

- Without amalgamation: Current and projected RCMP costs are reflected below:

<i>Police Funding Model - Requisition - municipal population based on 5,000 and under (Provincial Police Service Agreement with RCMP)</i>				
<i>*Based on information received in 2020</i>				
Towns - Pre Amalgamation				
Year	Black Diamond	Turner Valley	Total Both Towns	
Payable 2020	56,446	54,632	111,078	
2021	84,729	82,006	166,735	
2022	112,891	109,263	222,154	
2023	169,458	164,013	333,471	

- Urban municipalities with populations over 5,000 have three options for providing police services in their communities:
 - Contract with the federal or provincial government or another municipality for the provision of policing services;
 - Establish a stand-alone municipal police service; or

- Establish a regional police service with other municipalities, which may include the province.
- The most common municipal policing arrangement in Alberta is the use of contract policing. Under this arrangement, the RCMP provides policing services to a municipality under the Municipal Police Service Agreement (MPSA). [*Information sheet from AUMA regarding Municipal policing for municipalities with populations above 5000.*](#)
- With Amalgamation: It is projected that the RCMP contract for the amalgamated municipality would be in the neighbourhood of \$550,000 annually, however, this amount will be offset by the Municipal Policing Assistance Grant available to municipalities with a population of 5,000 or more.

How much do you expect to receive from the Municipal Policing Assistance Grant? Is the grant based on population or percentage?

- Municipalities with a population over 5,000 that provide their own municipal police services are eligible for this grant. The grant is issued each year and no application is required.
- Once amalgamated, access to the Municipal Police Assistance Grant (MPAG) program would be accessible as the population threshold (5001) will have been met.
- The grant is based on population and it includes a \$200,000 base payment + \$8 per capita. The newly amalgamated Town would expect to receive \$242,000 annually.

Police Funding Model - municipal population based on 5,001 to 15,000 (Municipal Police Agreement with RCMP)			
<i>*Based on information received in 2020</i>			
Year	New Municipality	Provincial Funding *	Net Amount - Post Amalgamation
Estimated Cost - 2023	550,000	(242,072)	307,928
Total	550,000	(242,072)	307,928
MPAG financial assistance is based on the following thresholds: <i>*Towns and cities with a population from 5,001 to 16,666 receive a \$200,000 base payment plus an additional \$8.00 per capita.</i> <i>* Population baseline ~ Black Diamond 2,700 and Turner Valley 2,559 total combined 5,259 (based on 2016 Census)</i> <i>*Does not replace the Municipal Enforcement/CPO Costs</i>			

Could recognize minimal savings of **\$25,543** under the new model based on municipal population 5,001 to 15,000

Will the RCMP station remain in Turner Valley or will it move it to a more central location in Black Diamond?

- This decision rests with the RCMP and to our knowledge no change is being considered at this time.

When our community does begin to pay for policing, will we be guaranteed to receive the same number or more officers on the ground in our community?

- The RCMP is responsible for determining service levels.

Will the additional RCMP officers paid by Diamond Valley Taxpayers be dedicated to serving our community or will they have added to the pool for the area?

- The agreement between the RCMP and the Municipality would set out service expectations for both parties. The additional officers through the municipal agreement would need to be negotiated by the new Council.

Community Peace Officers / Municipal Enforcement

What about the bylaw officers? Will they be eliminated?

- The amalgamation process is based on continuing existing levels of service. If the Towns amalgamate, service levels, budgets and staffing will be reviewed by the new municipality's Council and CAO. The current municipal staff positions will remain in place until this assessment is completed. Staffing and service levels are reviewed through the annual budget negotiation process.
- Current staffing levels:
 - Turner Valley: Staffing complement 1.75 Community Peace Officer Level 1, varying shifts 0800-2300
 - Black Diamond: Staffing complement 2.0 Community Peace Officer Level 1, varying shifts 0800-2300

Will releasing Councillors and employees enable the Towns to hire more Peace Officers so we can have the night shift covered?

- If the Towns amalgamate, service levels and staffing, including municipal enforcement, will be reviewed by the municipality's new Council and CAO.

Other Emergency Services

Which call-out system would be used for Foothills Search and Rescue?

- **UPDATED:** The Town's Foothills Search and Rescue call-out system will continue to be supported through Foothills Regional Emergency Services Commission.
- **UPDATED:** Emergency Services Sub-Committee Report and Recommendations: The level of service will be maintained for three branches of Emergency Services: Fire, Emergency Management, and Community Peace Officers in both Black Diamond and Turner Valley until the incorporation date. Service levels will be maintained until the new CAO, and the new Council determine the service levels and organizational structure.
- **UPDATED:** Full Report can be found here:
<https://blackdiamond.civicweb.net/filepro/documents/57426?preview=59677>

<https://turnervalley.civicweb.net/document/53821/2021-0512%20Emergency%20Services%20Sub-Committee%20Report.pdf?handle=11E1C65C1F934EAEBFB2F84CE727BF44>

FINANCE

Financial Implications of Amalgamation

Will the Towns provide a unified report that will cover all of the financial information pros and cons of amalgamation for the residents to review? And if so, when could this be made available?

- **UPDATED:** The costs to amalgamate are considered throughout the process. An Amalgamation Finance Sub-committee was established with representation from both Town Councils and administration to consider the costs carefully. The committee analyzed the financial information of both Towns. This information has been made available publicly (June 30, 2021) and can be found here:
[Black Diamond Finance update](#)
[Turner Valley Finance update](#)
- **UPDATED:** The overall financials between the two Towns have been compared and are included below. For a detailed breakdown of the financials, please visit each Town's audited financials – available on the Towns' websites.
- **UPDATED:** It must be noted, however, that future decisions of Council can't be predicted and while we can estimate many of the possible efficiencies and or additional costs related to amalgamation, decisions as to whether those efficiencies or additional costs are realized will lie with future Councils and administrations.

APPENDIX A

Consolidated Statement of Financial Position (for the year ended December 31, 2020)

Town of Turner Valley /Black Diamond			
Consolidated Statement of Financial Position			
For the year ended December 31, 2020			
	BD 2020		TV 2020
FINANCIAL ASSETS			
Cash & temporary investments	\$	10,774,147	2,796,757
Taxes & grants in place of taxes receivabl		273,569	318,992
Trade & other receivables		640,197	2,480,117
Investments		-	5,748,511
	\$	11,687,913	\$ 11,344,377
LIABILITIES			
Accounts payable and accrued liabilities	\$	350,474	378,916
Employee benefit obligations		118,240	
Deposit liabilities		743,893	740,715
Deferred revenue		2,001,382	3,252,801
Long-term debt		611,337	1,447,438
Other liabilities		21,429	-
	\$	3,846,755	\$ 5,819,870
NET FINANCIAL ASSETS	\$	7,841,158	\$ 5,524,507
NON-FINANCIAL ASSETS			
Tangible Capital Assets		38,385,775	42,650,405
Prepaid expenses		124,542	32,525
Inventory for consumption		50,668	2,362
Land held for resale inventory			48,414
	\$	38,560,985	\$ 42,733,706
Accumulated Surplus		46,402,143	48,258,213

APPENDIX C

Consolidated Statement of Operations (for the year ended December 31, 2020)

<i>Town of Turner Valley /Black Diamond</i>		
<i>Consolidated Statement of Operations</i>		
<i>For the year ended December 31, 2020</i>		
	BD 2020	TV 2020
REVENUE		
Net municipal property taxes	2,906,558	2,995,103
User fees & sales of goods	2,099,839	1,928,153
Government transfer for operating	573,761	332,628
Investment income	126,616	156,291
Penalties & costs of taxes	60,795	108,902
Licenses & permits	138,565	69,332
franchise & concession contracts	236,870	438,221
Gain on disposal of TCA	8,000	
Rental	188,454	
Other	126,730	
Offsite levies & assessments	39,337	
	<u>6,505,525</u>	<u>6,028,630</u>
EXPENSES		
Legislative	150,706	201,926
Administration	654,460	1,236,640
Economic and agriculture development		73,777
Protective Services	812,246	724,195
Transportation services	1,187,433	1,788,490
Water Supply & distribution	1,107,596	404,364
Wastewater treatment & disposal	918,575	1,047,793
Waste management	214,774	318,234
Other environmental use & protection	139,783	-
Family & community support services	79,025	59,192
Cemeteries & crematoriums	56,000	56,000
Planning & development	381,923	397,082
Parks & recreation	1,088,443	674,695
Culture -libraries, museums, halls	181,930	259,832
	<u>6,972,894</u>	<u>7,242,220</u>
Excess (Deficiency) of Revenue over Expenses before other	<u>(467,369)</u>	<u>(1,213,590)</u>
Government transfer for capital	2,109,560	390,344
Contributed assets	-	-
	<u>2,109,560</u>	<u>390,344</u>
Excess of revenue over expenses	1,642,191	(823,246)
Accumulated surplus, beginning of year	44,759,952	49,081,459
Accumulated surplus, end of year	<u>46,402,143</u>	<u>48,258,213</u>

Where are the cost savings of amalgamation to be realized?

- Decisions made by both Turner Valley and Black Diamond Councils through the amalgamation process that will result in reduced costs include:
 - A seven (7) member Council – resulting in reduction of seven (7) elected officials.
 - One (1) CAO – resulting in reduction of one (1) CAO.
- It is also expected that there will be some reduction in administrative costs by eliminating redundancies between the two Towns including:
 - Financial audit
 - IT – software
 - IT – hardware
 - Office equipment
- Upon amalgamation, a service level review will be conducted, and the organizational structure will be assessed to determine and identify the requirements for the amalgamated town.
- **UPDATED:** Potential annual savings have been estimated in the Finance Report to Public's Costs and Savings of Amalgamation section (p. 9-11). Most long term savings can not be estimated at this time until a service level review is conducted and implemented. For convenience, the table below indicates some of the cost savings and anticipated one time expenses which will need to occur after incorporation.

ESTIMATED AMALGAMATION SAVINGS & COSTS - BLACK DIAMOND AND TURNER VALLEY					
		<i>Pre</i>	<i>1-3 mo</i>	<i>1-2 years</i>	<i>Long Term</i>
	Amalgamation Savings - Black Diamond and Turner Valley				
ADMINISTRATIVE	Audit - amalgamated entity			-15,000	
	IT - Software (eliminate redundancy)		-20,000		
	IT - Hardware (eliminate redundancy)				-20,000
	Office Equipment savings - postage meter / photo copiers			-12,000	
COUNCIL:	One council - comprised of seven (7) members, six (6) councillors and one (1) mayor		-200,000	-200,000	-200,000
	Reduction of CAO role - Salary / wages / benefits / other costs / travel		-150,000	-150,000	-150,000
GRANTS:	Transition stream(Feasibility study and Maven Contract)	-250,000			
	RCP ACP Grant 1/2, BD 1/4, TV 1/4 -pd portion of Mavin	-32,500			
	Alberta Municipal Policing Assistance Grant			X	X
	Debt Servicing / Infrastructure		X		
ORGANIZATIONAL RESTRUCTURING:	Duplication of duties and responsibilities - unknown will require service level review / organization structure review			X	
	Review of amalgamated workforce, senior management team - unknown will require service level review / consultant assistance with organization structure			X	
	Expected Amalgamation Savings - Black Diamond and Turner Valley	-282,500	-370,000	-377,000	-370,000

		Pre	1-3 mo	1-2 years	Long Term
One Time Amalgamation Costs - Black Diamond and Turner Valley					
BRANDING:	Logos / Branding	10,000			
	Community Entrance Signs, Buildings and other facilities, town flags			17,500	25,000
	Vehicle and equipment decals		8,100		
	Uniforms (CPO, Fire)		1,000	1,000	
	Mapping- GIS incorporation -		X		
	Domains (website)		200		
	Webpage development		50,000		
	Other Costs - name change/letter head/address change notices/printing costs/vehicle registries/Legal Seals/town stamps		5,000		
MERGING:	Roll files (including actual moving) - Reorganization/creation of file storage to accommodate merged records		15,000		
	IT/Telus/compatibility of technology/computer software, merging or incorporating other users		10,000		
	Upgrade of phone system to accommodate additional lines and extensions for more staff		12,000		
	IT - merging and changing e-mails, servers, etc.		51,500		
	Accounting System - we use the same agency, but there will be a cost to merge the systems into a new data base	75,000	15,000		
MOVE:	Deploying staff to different locations/ furniture/office equipment/renovations to accommodate staff in buildings		100,000		
	Infrastructure - electrical/wiring to expand space			50,000	
CONSULTANTS:	Mavin - amalgamation consultant	200,000			
	Urban Systems (feasibility study)	134,000			
	HR consultant HR policies should be done/reviewed by an expert		125,000	175,000	
LEGAL:	Any legal advice required when going through the bylaws/policies/contracts/alignment process		25,000	175,000	
BANKING:	Banking requirements; selection/new cheques/deposits/information for vendors	X			
COUNCIL:	Increased costs of Councils attending Amalgamation meetings	32,000			
	2022 Election	8,000			
STAFF:	Severance packages - organizational structure review and development			X	
OTHER:	Miscellaneous costs	25,000	25,000	25,000	25,000
PLANNING:	Update of Planning documents			100,000	100,000
EXPENSES - ONE TIME COSTS		\$ 484,000	\$ 442,800	\$ 543,500	\$ 150,000

Taxation

With the amalgamation, presumably there will be cost savings. Will these savings translate into lower property taxes?

How much tax savings will a home valued of \$350,000 see after the amalgamation?

What are the projected tax savings per household?

As the emphasis of this amalgamation is reducing operation costs, will our taxes be reduced? After all, by only having one location, we will only need one mayor and a reduction in city staff therefore operating cost will be reduced.

- Future tax savings cannot be predicted. Taxation for the amalgamated municipality is the responsibility of the future Council. The future Council must prepare both operating and capital budgets in a three-year (operational) and five-year (capital) cycle. The future Council will establish the tax rate based on understanding the community's preferred levels of service and property valuation. There are also tax requisitions outside the control of the municipality. The future Council will continue to operate under the guidelines of the *Municipal Government Act* (MGA) and make appropriate decisions to operate the community in the most efficient way possible.
- How Tax Rates are Determined:
 - Each year, municipal councils determine the amount of money they need to operate their municipality.
 - From this amount, the council then subtracts known revenues (for example, licences, grants, and permits).
 - The remainder is the amount of money the municipality needs to raise through property taxes in order to provide services for the year.
 - This revenue requirement is then used to calculate the tax rate.
 - The tax rate is the percentage of assessed value at which each property is taxed in a municipality. The revenue requirement is divided by the assessment base (the total value of all assessed properties in the municipality).
 - The tax rate calculation is expressed in the following formula:
$$\frac{\text{Revenue requirement}}{\text{Assessment base}} = \text{tax rate}$$
- Future tax rates will be established based on:
 - operational requirements (budget),
 - plus requisitions (payments to other levels of government),
 - divided by the total assessment of all properties (legally required to pay municipal taxes) to determine the tax rate for the new municipality.
- For more information: [Municipal Affairs Guide to Property Assessment and Taxation in Alberta](#)

Will each town still be responsible for setting their own mill rates?

- The newly amalgamated Town will be responsible for setting the mill rate after January 1, 2023. Between now and January 1, 2023, each Town continues to be responsible for setting their own mill rates.

Grants

Will the amalgamation result in additional eligibility for provincial funding or capital grants?

What's the difference between a town of 2500 and a town of 5000 with respect to provincial and federal funding?

An amalgamated town will be eligible for the following grants:

- [Alberta Community Partnership:](#)
 - Provides support for regional collaboration and capacity building initiatives. In accordance with the 2020/21 guidelines, \$1,200,000 is the total grant amount the new town would be eligible to apply for following amalgamation January 1, 2023.
 - Based on the following two streams:
 - Transition Stream - base amount of \$100,000 plus \$500 per capita – to a max of 300 persons for a total of \$250,000
 - Debt servicing/Infrastructure Stream – base amount of \$500,000 plus \$1,500 per capita - to a max of 300 persons for a total of \$950,000
 - However, grant totals could change based on program approval/guidelines in subsequent years.
 - As the guidelines currently stand, projects occurring as a result of restructuring should be completed within two years following the date of municipal restructuring.
- [Municipal Sustainability Initiative:](#)
 - Helps support local infrastructure priorities and build strong, save and resilient communities.
 - Current status of **MSI Allocations** - Municipal restructuring will not affect funding allocations to municipalities for a defined period under the MSI program. In cases where amalgamation or dissolution has occurred, the restructured municipality will receive a funding allocation equivalent to that which would have been calculated pre-restructuring for a subsequent five years, and any unexpended funding will be transferred to the amalgamated/receiving municipality.
- [Federal Gas Tax:](#)
 - Available until 2024, this program provides financial support to municipalities to help build and revitalize local public infrastructure. Federal Gas Tax will not have a net reduction until expiry, or after the expiry of a five (5) year period following amalgamation.

Any chance the provincial government may cut your expected funding due to its diminishing bank balance?

- From the information received to date, we do not anticipate any decline in funds and grants that support collaboration, including amalgamation. There has been an approximate 20% decline in the municipal sustainability initiative, which all municipalities in Alberta have experienced. There have also been increasing costs downloaded to the municipalities, including the requirement to pay for policing.
- **UPDATED:** The information received to date from the Province indicates that after incorporation, the Town may be eligible to receive the Transition (\$250,000) and Debt Servicing streams of the Alberta Community Partnership (\$950,000), a possible total of \$1.2 Million.

Amalgamation Costs

What's the dollar cost of the amalgamation process?

What are the costs of new signage/letterhead/logos/re-branding etc. after Amalgamation?

UPDATED: The second table below has a chart that indicates the estimated cost of the rebranding. Between logos, letterhead, and website integration, a high-level estimate would be approximately \$100,000.00, of which some may be able to be covered under the Alberta Community Partnership Transitional grant

- The attached table indicates some of the cost savings and anticipated one-time expenses which will need to occur after incorporation.
- These are costs that may be covered under the Alberta Community Partnership grant. The Alberta Community Partnership grant information is listed above under Grants and additional information can be found at <https://www.alberta.ca/alberta-communitypartnership.aspx>

ESTIMATED AMALGAMATION SAVINGS & COSTS - BLACK DIAMOND AND TURNER VALLEY

		Pre	1-3 mo	1-2 years	Long Term
	Amalgamation Savings - Black Diamond and Turner Valley				
ADMINISTRATIVE	Audit - amalgamated entity			-15,000	
	IT - Software (eliminate redundancy)		-20,000		
	IT - Hardware (eliminate redundancy)				-20,000
	Office Equipment savings - postage meter / photo copiers			-12,000	
COUNCIL:	One council - comprised of seven (7) members, six (6) councillors and one (1) mayor		-200,000	-200,000	-200,000
	Reduction of CAO role - Salary / wages / benefits / other costs / travel		-150,000	-150,000	-150,000
GRANTS:	Transition stream(Feasibility study and Maven Contract)	-250,000			
	RCP ACP Grant 1/2, BD 1/4, TV 1/4 -pd portion of Mavin	-32,500			
	Alberta Municipal Policing Assistance Grant			X	X
	Debt Servicing / Infrastructure		X		
ORGANIZATIONAL RESTRUCTURING:	Duplication of duties and responsibilities - unknown will require service level review / organization structure review			X	
	Review of amalgamated workforce, senior management team - unknown will require service level review / consultant assistance with organization structure			X	
	Expected Amalgamation Savings - Black Diamond and Turner Valley	-282,500	-370,000	-377,000	-370,000

		<i>Pre</i>	<i>1-3 mo</i>	<i>1-2 years</i>	<i>Long Term</i>
One Time Amalgamation Costs - Black Diamond and Turner Valley					
BRANDING:	Logos / Branding	10,000			
	Community Entrance Signs, Buildings and other facilities, town flags			17,500	25,000
	Vehicle and equipment decals		8,100		
	Uniforms (CPO, Fire)		1,000	1,000	
	Mapping- GIS incorporation -		X		
	Domains (website)		200		
	Webpage development		50,000		
	Other Costs - name change/letter head/address change notices/printing costs/vehicle registries/Legal Seals/town stamps		5,000		
MERGING:	Roll files (including actual moving) - Reorganization/creation of file storage to accommodate merged records		15,000		
	IT/Telus/compatibility of technology/computer software, merging or incorporating other users		10,000		
	Upgrade of phone system to accommodate additional lines and extensions for more staff		12,000		
	IT - merging and changing e-mails, servers, etc.		51,500		
	Accounting System - we use the same agency, but there will be a cost to merge the systems into a new data base	75,000	15,000		
MOVE:	Deploying staff to different locations/ furniture/office equipment/renovations to accommodate staff in buildings		100,000		
	Infrastructure - electrical/wiring to expand space			50,000	
CONSULTANTS:	Mavin - amalgamation consultant	200,000			
	Urban Systems (feasibility study)	134,000			
	HR consultant HR policies should be done/reviewed by an expert		125,000	175,000	
LEGAL:	Any legal advice required when going through the bylaws/policies/contracts/alignment process		25,000	175,000	
BANKING:	Banking requirements; selection/new cheques/deposits/information for vendors	X			
COUNCIL:	Increased costs of Councils attending Amalgamation meetings	32,000			
	2022 Election	8,000			
STAFF:	Severance packages - organizational structure review and development			X	
OTHER:					
	Miscellaneous costs	25,000	25,000	25,000	25,000
PLANNING:					
	Update of Planning documents			100,000	100,000
EXPENSES - ONE TIME COSTS		\$ 484,000	\$ 442,800	\$ 543,500	\$ 150,000

- Upon approval of the amalgamation, and through the transition period, a 1 to 3 year plan will be developed to guide administration and Council through the transition period by identifying key tasks necessary to move both towns forward as one. During this time frame there may be savings recognized. High-level transition costs may be covered by grants from the province (i.e., Alberta Community Partnership Grant).

What's the cost of the consulting group assigned to the amalgamation process?

- The cost of the consulting group is \$200,000 to assist with necessary work for the negotiations and final report submission to the Province, should the Councils support amalgamation.
- \$101,205 in grant funds have been received from the Province to offset the consultant costs.
 - This cost does not include the council per diems or staff time allotted to the project.

Debt

What Debt does each Municipality bring to the table? Which town has the major Debt?

Will the Debt be paid for before amalgamation or will the towns combine their debts with amalgamation?

- **UPDATED:** The Amalgamation Finance Sub-committee analyzed the financial information of both communities. Adding the Debt, Reserves and Tangible Capital Assets, the two towns are comparable. For the full report on the finance subcommittee
 - [Black Diamond](#)
 - [Turner Valley](#)
- **UPDATED:** While the Finance Subcommittee has assessed the data, financial statements are available on each Town's website for anyone to review. There is a note called "Long-Term debt" which shows what is owed in debt.

Town of Turner Valley and Town of Black Diamond Long Term Debt - Debenture Schedule								
Town of Turner Valley Long Term Debt - Debenture Schedule								
Liability	Loan #	Expires	Principle	Principle Balance 2021	Principle Balance 2022	Interest Outstanding 2021	Interest Outstanding 2022	
ACFA - Town shop	4001009	2026	355,112	281,936	267,940	96,756	85,505	
ACFA - North Feeder	3100148	2029	293,681	201,853	183,668	52,331	42,274	
ACFA - Library	4001007	2035	629,312	499,634	474,831	171,467	151,529	
ACFA - Bypass	4001896	2024	100,000	38,995	26,202	1,094	524	
ACFA - Fire	4001898	2036	300,000	239,439	226,314	53,718	47,299	
ACFA - Tandem Dump Truck	4002125	2026	100,000	62,719	52,854	4,784	3,399	
ACFA - RLS/Paris	4001897	2025	235,000	122,862	99,179	6,285	4,139	
			2,013,105	1,447,438	1,330,989	386,436	334,669	
Town Black Diamond Long Term Debt - Debenture Schedule								
Liability	Loan #	Expires	Principle	Principle Balance 2021	Principle Balance 2022	Interest Outstanding 2021	Interest Outstanding 2022	
ACFA - PW Shop Addition	4001892	2040	139,598	119,259	114,818	39,808	36,295	
ACFA - PW - Water Distribution Pumping Upgrade	1185115	2026	295,307	116,300	99,784	27,283	19,869	
ACFA - Sewer - Replacement Sanitary Sewer Mains	1179465	2022	147,000	22,373	11,551	2,290	780	
ACFA - Sewer - Extending the East Sanitary Sewer Truck Main	1180397	2023	206,515	42,770	29,319	5,121	2,608	
ACFA - Replacing Sanitary Sewer Mains	1183359	2025	348,647	118,780	97,918	24,133	16,412	
ACFA - Paving of 1st Street SW from 1 Avenue SW to 6 Avenue SW	4000252	2027	438,500	191,856	166,196	35,230	25,954	
			1,575,567	611,337	519,586	133,865	101,918	
Variance			437,538	836,101	811,403	252,571	232,751	

- All financial statements of both the municipalities are located:

[Town of Black Diamond financial statements](#)

[Town of Turner Valley financial statements](#)

Infrastructure

Will the amalgamation result in additional provincial funding or capital grants to improve infrastructure and increase levels of service?

- The Alberta Community Partnership Program does offer some incentives and the information on infrastructure grants can be accessed on the link below:
Source: [Alberta Community Partnership program guidelines](#) (Information also available under the Grants section above).
- Infrastructure renewal and replacement is important in both communities. A list of infrastructure priorities will come under the purview of the new Council and administration as part of the ongoing capital budget process and will continue to be funded through grants, reserves and debentures.
- Service levels will be reviewed along with organizational structures if and when amalgamation is approved.

What infrastructure projects have to be undertaken to make both towns on equal footing?

Many streets and roads in Black Diamond are unpaved. Will the amalgamation result in additional provincial funding or capital grants to rectify this disgraceful situation?

Are the costs of infrastructure replacement adequately addressed in the capital requirements of both municipalities?

- **UPDATED:** As part of the amalgamation process, the capital assets of both communities were assessed (below).
- **UPDATED: Infrastructure Planning:** Topic #20 in the Amalgamation Negotiation Report says that the ten-year capital plan be utilized as the indicator of the infrastructure condition and costs to upgrade infrastructure and equipment. For the ten-year capital plan Turner Valley has \$28.4M planned and Black Diamond has \$38.4M planned. This will assist with addressing the infrastructure variations between the two towns by comparing priorities in each municipality. The below table indicates the difference in the assets in each individual municipality.
- **UPDATED:** The Towns have agreed that if they proceed with amalgamation, each Town will dedicate any currently undedicated capital reserves and excess operational reserves to infrastructure plans on the 10 year capital plan list. This will assist with addressing infrastructure priorities.
- **UPDATED:** Both municipalities have sufficient financial funding available for their 10-year capital plans.
- **UPDATED:** The most significant infrastructure deficit between Black Diamond and Turner Valley is roads. Black Diamond has a replacement value in excess of \$67.4 M. Turner Valley has a replacement value in excess of \$45.2 M. An assessment of these assets should be performed upon amalgamation. It is noted that Black Diamond has 26 km more of roadways than Turner Valley. Black Diamond's capital plan costs for roads only includes bringing current gravel roads back to gravel roads, not pavement, once underground repairs are completed. The new Council will need to address the road infrastructure deficit and differences between the two municipalities upon amalgamation. A review of both municipalities' ten (10) year capital plans will assist with determining the priorities and needs in the immediate future. The Towns of Black Diamond and Turner Valley could draw on reserves to assist in the funding of roads to reduce the infrastructure deficit.

How will you insure that upgrades like paving, pathways, and infrastructure are distributed equally between the two towns? Eg will Turner Valley see a decrease in road upgrades/maintenance while waiting for Black Diamond roads to be paved?

- All infrastructure upgrades, paving and pathways should be included in the ten-year capital plan. Infrastructure priorities will be determined by the new Council, based on both priority and the asset replacement forecast.

Black Diamond Schedule of tangible capital assets - Consolidated Statement as at December 31, 2020

	Black Diamond			SRRUC			Total	Years	
	TCA	Amortization	Net Book Value	TCA	Amortization	Net Book Value		Average Average of Assets	Remaining useful life
Land	\$ 1,583,588	\$ -	\$ 1,583,588	\$ 174,079		\$ 174,079	\$ 1,757,667		
Land Improvements	1,991,381	369,188	1,622,193			-	1,622,193		
Buildings	5,606,347	2,187,601	3,418,746	473,890	70,939	402,951	3,821,697	11.4	29.5
Engineered structures	26,987,418	5,320,785	21,666,633	3,808,913	448,186	3,360,727	25,027,360	6.3	44.3
Machinery and equipment	4,806,693	2,299,851	2,506,842	158,002	58,931	99,071	2,605,913	11.0	5.9
Vehicles	3,306,405	1,499,519	1,806,886			-	1,806,886	7.6	3.9
Construction in progress	1,744,058	-	1,744,058			-	1,744,058		
	<u>\$ 46,025,891</u>	<u>\$ 11,676,944</u>	<u>\$ 34,348,947</u>	<u>\$ 4,614,884</u>	<u>\$ 578,056</u>	<u>\$ 4,036,828</u>	<u>\$ 38,385,775</u>	<u>9.1</u>	<u>20.9</u>

Turner Valley Schedule of tangible capital assets - Consolidated Statement as at December 31, 2020

	Turner Valley			SRRUC			Total	Years	
	TCA	Amortization	Net Book Value	TCA	Amortization	Net Book Value		Average Average of Assets	Remaining useful life
Land	\$ 545,741	\$ -	\$ 545,741	\$ 174,078		\$ 174,078	\$ 719,819		
Land Improvements	-	-	-			-	-		
Buildings	8,482,706	3,199,604	5,283,102	473,890	67,787	406,103	5,689,205	24.0	24.9
Engineered structures	47,757,965	20,125,941	27,632,024	3,808,913	391,571	3,417,342	31,049,366	25.7	25.4
Machinery and equipment	3,575,696	1,907,423	1,668,273	158,002	-	158,002	1,826,275	7.0	6.3
Vehicles	1,776,025	1,075,358	700,667	-	-	-	700,667	6.6	4.6
Construction in progress	2,665,073	-	2,665,073			-	2,665,073		
	<u>\$ 64,803,206</u>	<u>\$ 26,308,326</u>	<u>\$ 38,494,880</u>	<u>\$ 4,614,883</u>	<u>\$ 459,358</u>	<u>\$ 4,155,525</u>	<u>\$ 42,650,405</u>	<u>15.8</u>	<u>15.3</u>

Elections

Were costs to hold an election discussed?

Did the committee consider seeking permission from the Province to delay elections until after the amalgamation decision (thus holding one election instead of two)? If not, why not?

- The estimated cost of an election is between \$8,000-\$12,000.
- Yes, election costs were considered when requesting the deferral of the 2021 election in the letter of intent.
- Early on in the negotiation process, Council had to decide election dates. The Minister of Municipal Affairs presented three (3) scenarios:
 - Scenario 1: complete the amalgamation application by April 30, 2021 with a change to the incorporation date to January 1, 2022 (one year earlier) to enable maintaining the current councils through the interim period.
 - Scenario 2: commit to completing the amalgamation application by April 30, 2021, but if it is not complete by that date, the nomination period for the October 2021 election would start on June 1, and the election would occur in October 2021.
 - Scenario 3: continue with the original application timeline, September 2021. A normal election will occur in October 2021.

Effectively, the Minister said he is not prepared to defer an election for such a significant time period. The only option was to speed up the amalgamation negotiations and application or hold an election in October.

- Both Councils, through JFAC, reviewed the Minister's options and determined that they preferred to focus on the originally agreed upon process for reviewing information and negotiating the amalgamation, and reasonable timelines for public engagement. The Councils voted in favour of Option 3.
- If the amalgamation does not proceed, the Councils elected in October 2021 for each community will continue through the four (4) year election term. A second election will not be required.
- If amalgamation is approved, another election in late 2022 will be required.

Please see the attached links for official documentation.

[Letter of Intent to Amalgamate – September 11, 2020](#)

[Municipal Affairs response to Letter of Intent November 2020](#)

[Towns' response to Minister December 9, 2020](#)

DEPARTMENTS / BYLAWS

FCSS

Considering the many struggles that people have had and are having due to COVID, has there been research into how amalgamation will help or hinder the work of FCSS in helping those who have various mental, emotional, and/or financial needs?

- Family and Community Support Services will continue to provide programming and services to both communities, eventually as one program. Several shared services currently exist and partnerships with external organizations and the Province will be maintained.

Economic Development

Will there be increased grant opportunities as an economic impact of amalgamation?

- Regional grant opportunities are expected to increase once amalgamated. The Intermunicipal Economic Development Committee (IEDC) will continue to guide business retention and investment attraction initiatives under one municipality. A service agreement is in place between Black Diamond and Turner Valley. The committee follows the [Intermunicipal Economic Development Strategy](#) to support both communities equally.

GENERAL QUESTIONS

Addressing – Postal Implications

What happens to our postal address? Will this be changed? Will the residents be able to retain their addresses and only the municipality name changes?

- The response from Canada Post is that Canada Post would not make any changes to current mailing addresses unless requested by the municipality.
- **UPDATED:**
 - Addressing: As the name of the municipality would be changing upon incorporation, there will be a requirement to change both residential and mailing addresses. Work is underway to limit the inconvenience to the residents.
 - Land titles will be changed via the province at no additional charge to the residents. Processing time is approximately 3-6 months after incorporation.
 - Administration is working with Service Alberta and the Registry departments to waive the cost of addressing changes on all Alberta ID inclusive of Alberta Drivers Licenses. <https://www.alberta.ca/update-driving-documents.aspx>
 - Passports can have address changes right on the passport by the individual passport holder. At the time of renewal, a new address can be submitted, and no additional charges other than the renewal fee applies. <https://www.canada.ca/en/immigration-refugeescitizenship/services/canadian-passports/help-centre/general.html>
 - Firearms/PAL has been working with the RCMP for direction on fire arm licensing and address changes. Registered Gun owners can change their address via phone or online - link is provided below on how to connect with the department to change address. <https://www.rcmp-qrc.gc.ca/en/firearms/contact-the-canadian-firearms-program>

I respectively ask each CAO –

What do you believe is the one key benefit for your respective town from amalgamating?

- The decision to amalgamate is a Council decision. Councils of Black Diamond and Turner Valley worked together on establishing benefits of amalgamation are indicated on pages 4 and 5.

Who will pick up the cost of mail forwarding?

- Administration is currently working with external partners regarding address changes. The newly elected Council could also budget transitional costs on the residents' behalf.

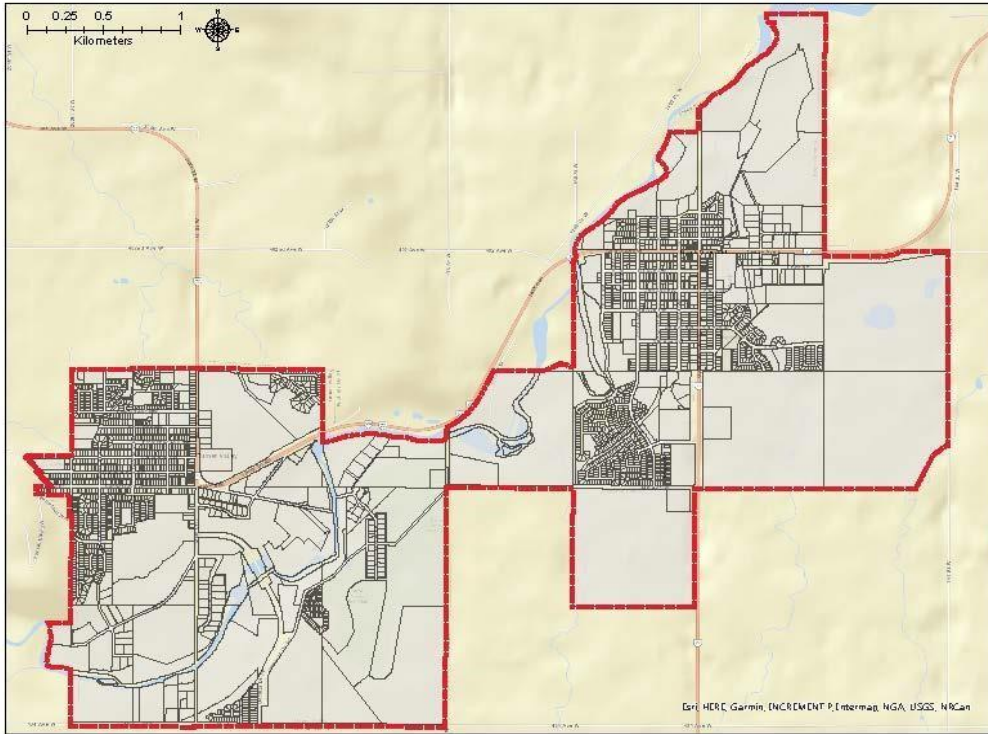
Can you confirm that residents will have to do an address change after amalgamation?

- The name of the municipality will be changing, therefore addressing will need to change. Administration in both towns are working with external partners to reduce the disturbance with the municipal name address changes.

Annexation/Boundaries/Map

Please provide a map showing the area of the proposed Amalgamation and what land sections are affected.

See below.



Has Black Diamond annexed the land in between the two towns on both sides of the highway along Hwy 7? Does the annexation create a thick band of land between the two towns in this corridor?

- The Black Diamond annexation did not include most lands on the north side of the Sheep River, except some Town-owned land where the current “Field of Dreams” town partnership is with the Boys and Girls Clubs of the Foothills.

Will the amalgamated Towns be taking over some Foothills County land?

- No. Amalgamation will not include any annexation of Foothills County property.

Regional

If amalgamated, would the new entity be eligible to apply to join the Calgary Metropolitan Region Board?

- Once amalgamated, the new Town would be eligible to apply for the Calgary Metropolitan Region Board. Membership is not guaranteed.

Special Municipality

Have you looked at other towns that have amalgamated, like Crowsnest Pass?

Can we keep the names similar to what Crowsnest Past did, so that we save cost of not having to do address changes, etc.?

- **UPDATED:** Crowsnest Pass is designated a 'Special Municipality.' The Towns asked the Province if the newly amalgamated town could be a Special Municipality. The Province said that the Special Municipality designation is only for municipalities that don't fit the current definitions of village, town, city or MD/County. To fit the term "specialized municipality" there would have to be an urban/rural land use. Turner Valley and Black Diamond have legal designations as Towns (which are urban) and therefore do not meet the criteria of being a specialized municipality.
- An amalgamated Turner Valley and Black Diamond fits the definition of a Town and so cannot apply to be a Special Municipality.
- Special Municipalities are unique municipal structures typically used for combining urban and rural communities. There are only 6 Special Municipalities in Alberta.
- **UPDATED:**
 - Addressing: As the name of the municipality would be changing upon incorporation there will be a requirement to change both residential and mailing addresses. Work is underway to limit the inconvenience to the residents.
 - Land titles will be changed via the province at no additional charge to the residents. Processing time is approximately 3-6 months after incorporation.
 - Administration is working with Service Alberta and the Registry departments to waive the cost of addressing changes on all Alberta ID inclusive of Alberta Drivers Licenses. <https://www.alberta.ca/update-driving-documents.aspx>
 - Passports can have address changes right on the passport by the individual passport holder. At the time of renewal, a new address can be submitted, and no additional charges other than the renewal fee applies. <https://www.canada.ca/en/immigration-refugeescitizenship/services/canadian-passports/help-centre/general.html>
 - Firearms/PAL has been working with the RCMP for direction on fire arm licensing and address changes. Registered Gun owners can change their address via phone or online - link is provided below on how to connect with the department to change address. <https://www.rcmp-grc.gc.ca/en/firearms/contact-the-canadian-firearms-program>

APPENDIX 3

Finance Report to Public



Amalgamation Negotiations: Finance Report to Public

June, 2021

Introduction

One of the main topics of amalgamation is how the two towns compare financially. To address the finance negotiation topics, a Finance Subcommittee was struck. The Finance Subcommittee included two Council members from each Town with support from both Town's administrative team. The Finance Subcommittee was responsible for reviewing the current and historical financial information and addressing the public's questions.

Finance topics were top of mind for citizens in all of the public engagement opportunities (i.e., emails, social media, online events). Questions from the public included what are the financial implications of amalgamation, and where are the cost savings of amalgamation to be realized?

To fulfill the Finance Subcommittee's scope, the following information was reviewed:

- Analysis of Municipal Debt and Reserves;
- Assessment and taxation;
- Operating Revenues and Expenditures;
- Capital Plans/ Asset evaluation review; and
- Comparisons to similar sized communities (Redcliff and Didsbury).

Following review of all information, recommendations were made to the Joint Friendship Agreement Committee (JFAC), and decisions were made by the JFAC. The JFAC decisions are included in this document for each required topic.

If the amalgamation negotiations proceed to an application to the Province, several topics must be addressed in the Financial report including:

- #16 Compensation to other Municipal Authorities
- #17 Financial Transitions
- #18 Interim Tax Treatment
- #19 Tax Treat (for properties previous annexed that have different tax considerations)
- #20 Authority to Impose Additional Tax (to service pre-amalgamation debt)
- #21 Assessment Matters

For more information on any of these topics, please refer to the [JFAC Report Finance report](#) which provides more technical background.

It is important to note that the recommendations were made based on information available today. Future Councils and administration can change everything to suit the needs of the new Municipality. There are no safeguards to "protect" the current Councils and Administration recommendations. All recommendations being made can be undone.

Overarching Recommendation

Both Turner Valley and Black Diamond are in good financial position and no red flags have been identified on financial issues.

Operating Revenues and expenditures

Findings: Both Turner Valley and Black Diamond have similar revenue sources, and operating costs are very similar. Revenue is derived from property taxes, grants, utility services and other income such as franchise and user fees. Examples of similar municipalities with populations comparable to 5,000 are provided for information only as a relative comparison of the costs and revenues of towns similar in size to an amalgamated municipality. Didsbury and Redcliff were picked for comparable municipalities as they are close to larger centres and have similar population sizes to the newly amalgamated municipality. The expenses of a joint municipality are in line with similar-sized comparisons.

A comparison table has been included on the next page. The expenses and revenues for both Turner Valley and Black Diamond have been combined for example purposes only.

Based on this comparison, nothing of significant concern has been identified.

**Consolidated Statement of Operations
for the year ended December 31, 2020
Black Diamond and Turner Valley Combined
Comparison to
the Towns of Didsbury and Redcliff**

	Turner Valley & Black Diamond	Town of Didsbury	Town of Redcliff
REVENUE			
Net municipal property taxes	\$ 5,901,661	\$ 4,684,298	\$ 5,489,494
User fees & sales of goods	4,027,992	3,808,497	5,208,139
Government transfer for operating	906,389	1,095,263	643,123
Investment income	282,907	63,450	1,019,273
Penalties & costs of taxes	169,697	159,930	93,768
Licenses & permits	207,897	122,600	
Franchise & concession contracts	675,091	756,720	
Gain on disposal of TCA	8,000		
Contributed assets		637,153	
Rental	188,454		200,057
Other	126,730		1,157
Offsite levies & assessments	39,337		
	<u>12,534,155</u>	<u>11,327,911</u>	<u>12,655,011</u>
EXPENSES			
Legislative	352,632	207,502	137,002
Administration	1,891,100	871,962	1,360,524
Economic and agriculture development			
Protective Services	1,536,441	1,512,484	1,818,621
Transportation services	2,975,923	2,192,104	3,281,923
Water, wastewater and waste management	4,014,336	2,613,888	3,707,966
Other environmental use & protection	139,783		
Family & community support services	138,217		329,343
Cemeteries & crematoriums	112,000		
Planning & development	779,005	400,810	475,329
Parks & recreation	1,763,138	2,348,652	1,722,397
Culture -libraries, museums, halls	441,762		
Community services	-	514,044	
	<u>14,144,337</u>	<u>10,661,446</u>	<u>12,833,105</u>
Deficiency of revenue over expenses before other	<u>(1,610,182)</u>	<u>666,465</u>	<u>(178,094)</u>
Government transfer for capital	2,499,904	1,598,841	2,329,729
Gain (loss) on disposal of capital assets		(17,391)	
	<u>2,499,904</u>	<u>1,581,450</u>	<u>2,329,729</u>
Excess of revenue over expenses	815,945	2,247,915	2,151,635
Accumulated surplus, beginning of year	93,841,411	63,996,373	104,513,578
Accumulated surplus, end of year	<u>\$ 94,657,356</u>	<u>\$ 66,244,288</u>	<u>\$ 106,665,213</u>

Topic #16 Compensation to other Municipalities

Background: In an amalgamation, the Province requires any financial commitments to other municipalities be accommodated. If there is a need to provide compensation from the proposed municipality to other municipal authorities, then the details of the compensation should be included with the application.

Findings: Both Black Diamond and Turner Valley have contractual agreements with Foothills County that will need to be continued by the proposed new municipality:

- Black Diamond is committed to paying Foothills County \$22,154 annually until 2024 for the purposes of the annexation payments.
- Turner Valley is committed to paying Foothills County \$10,000 annual compensation for the paving of 16th Avenue (Turner Valley portion of 434 Avenue). This is a ten-year agreement, with the last payment to be made in 2030.
- There is no other compensation to other municipal authorities.

JFAC Decision: That JFAC includes under Topic 16 in the amalgamation negotiation report that the amalgamated Municipality would be required to pay Foothills County \$32,154/year until 2024 (for previous contractual agreements, which include annexation agreements and municipal road maintenance agreement) after which time the payment would be reduced to \$10,000/year with the last payment made in 2030.

Topic #18: Interim Tax Treatment

Background: The Province requires amalgamating municipalities to assess whether there are different property taxes in each municipality that would need to be changed midway through a tax year.

Findings: In this case, the municipalities are proposing an amalgamation incorporation date of January 1, 2023 and so no interim taxes treatments are applicable.

JFAC Decision: That JFAC include under Topic #18 in the amalgamation negotiation report to the Province that no interim tax treatment is required since the incorporation date would be January 1, 2023.

Topic #19 Tax Treatment (for properties previously annexed that have different tax considerations)

Background: The Province requires commitment to any previous annexation agreements. Typically, these include taxing properties at the rural taxation rate until a specific date or such time as the property owner makes a change to the property (i.e., land use change or development change).

Findings: In 2020, the Town of Black Diamond annexed lands to create a contiguous border with Turner Valley. The annexation agreement includes a clause that states for taxation in 2020 and in each subsequent year up to and including 2044, the subject lands must be assessed as if they were in Foothill County and taxed as if they were in Foothills County until a triggering event noted in the agreement. This is also inclusive of any discounts which Foothills County offers their ratepayers. This agreement is in an "[Order of Council](#)" and must be adhered to under legislative requirements.

JFAC Decision: That JFAC includes under Topic #19 in the amalgamation negotiation report that for the lands annexed by Black Diamond to unify a boundary between Black Diamond and Turner Valley, for the purposes of

taxation in 2020 and in each subsequent year up to and including 2044, these lands must be assessed as if in the County of Foothills and taxed as if in the County of Foothills, until a triggering event noted in the agreement.

Topic #20: Authority to Impose Additional Tax (to service pre-amalgamation debt)

Background: The MGA provides the ability for the Lieutenant Governor in Council (Cabinet) to establish authority for the proposed amalgamated municipality to impose an additional tax(es) to service debt from prior to amalgamation. If approved, the additional taxes may be restricted to the properties of an area/community, and the authority will be time-limited to ensure that the additional tax revenues are used to service that debt and nothing else.

A review of infrastructure deficits and assets (including debentures, reserves and condition of infrastructure) and capital equipment purchases occurred at a high level to determine if there was rationale or not for imposing an additional tax to either municipality.

This section has four JFAC decisions:

1. local improvement levies;
2. long-term debt;
3. reserves; and
4. capital plans and tangible capital assets (TCAS).

1. Local Improvement Levies

Findings: Local Improvement levies are utilized by the Town of Turner Valley to assist with the payment of large construction projects that benefit specific residents. The levies will stay with those properties in Turner Valley until such time as they are paid in full.

The Town of Turner Valley has ten (10) Local Improvement Levy bylaws. The total amount outstanding on December 31, 2020, is \$271,718.

The Town of Black Diamond does not utilize local improvement levies for infrastructure replacement.

JFAC Decision: That JFAC include under Topic #20 in the amalgamation negotiation report that the Local Improvement Levies remain with the Town of Turner Valley properties until such time as they are paid in full.

2. Long Term Debt

Background: Long-term debt is used by both municipalities to support upgrades in infrastructure replacement, equipment and buildings. Debt cannot be used to support operations.

Findings:

The following is the current summary of long term debt for each municipality.

(\$000's)	Principle Balance 2021	Principle Balance 2022	Principle Payments 2022	Interest Payments 2022
Town of Black Diamond	\$611,337	\$519,586	\$ 97,113	\$ 26,585
Town of Turner Valley	\$1,447,438	\$1,330,989	\$120,199	\$ 48,017
Variance	\$836,101	\$811,403	\$23,086	\$21,432

JFAC Decision: That JFAC include under Topic #20 in the amalgamation negotiation report that operating revenues continue to support the existing debts of both municipalities before and after amalgamation.

3. Reserves

Background: Alberta's municipalities provide a wide range of services to their residents and businesses. Municipalities are not permitted to run deficit budgets, so financial reserves allow municipalities to save money for major infrastructure projects while adhering to financial management requirements. Reserves are both operational and capital savings plans for the future.

Findings:

The following are the reserve balances at December 31, 2020, for each municipality.

		Turner Valley	Black Diamond
	Operating Reserves	1,337,821	3,124,245
	Capital Reserves	3,358,070	5,624,139
	Offsite Levies	1,469,911	1,147,151
	Total	6,165,803	9,895,535

Long-Term Debt	Principal Balance 2021	Principal Balance 2022	Principal Payments 2022	Interest Payments 2022
Town of Black Diamond	\$ 611,337	\$ 519,586	\$ 97,113	\$ 26,585
Town of Turner Valley	\$ 1,447,438	\$ 1,330,989	\$ 120,199	\$ 48,017
Variance	\$ 836,101	\$ 811,403	\$ 23,086	\$ 21,432

Reserves as at December 31, 2020	Operating Reserves	Capital Reserves	Offsite Levies	TOTAL
Town of Black Diamond	\$ 3,124,245	\$ 5,624,139	\$ 1,147,151	\$ 9,895,535
Town of Turner Valley	\$ 1,337,821	\$ 3,358,070	\$ 1,469,911	\$ 6,165,802
Variance	\$ 1,786,424	\$ 2,266,069	\$ 322,760	\$ 3,729,733

Both municipalities have designated capital reserves that are set aside to fund specific projects. The variance of \$3.7M will be addressed by having both municipalities equally contribute to the operational reserve of the proposed new municipality, and ensuring all reserves become designated reserves based on the 10-year capital plans. The intent is to direct current reserves to address infrastructure deficits.

JFAC Decision: That JFAC includes under Topic #20 in the amalgamation negotiation report that designated capital reserves to remain in individual municipalities until utilized. All existing undesignated capital reserves should be designated to restricted dedicated reserves contained within their 10-year capital plans prior to incorporation date. Operating reserves should be contributed to equally based on Black Diamond and Turner Valley's requirements, with the remainder to be designated to capital reserves.

4. Capital Plans and Tangible Capital Assets (TCAS)

Background: To fully compare the two municipalities' financial situations, the assets of both towns were compared.

Findings: The most significant infrastructure deficit between Black Diamond and Turner Valley is roads. Black Diamond has a replacement value in excess of \$67.4 M. Turner Valley has a replacement value in excess of \$45.2 M. An assessment of these assets should be performed upon amalgamation. It is noted that Black Diamond has 26 km more of roadways than Turner Valley. Black Diamond's capital plan costs for roads only includes bringing current gravel roads back to gravel roads, not pavement, once underground repairs are completed. The new Council will need to address the road infrastructure deficit and differences between the two municipalities upon amalgamation. A review of both municipalities' ten (10) year capital plans will assist with determining the priorities and needs in the immediate future. The Towns of Black Diamond and Turner Valley could draw on reserves to assist in the funding of roads to reduce the infrastructure deficit.

Town of Turner Valley and Black Diamond
Ten (10) Year Plan
2021-2030

	2021-2022		2023-2030		10 year plan total	
	Black Diamond	Turner Valley	Black Diamond	Turner Valley	Black Diamond	Turner Valley
Engineering Structures	\$ 3,885,020	\$ 4,666,000	\$ 20,329,000	\$ 22,304,150	\$ 24,214,020	\$ 26,970,150
Buildings	\$ 500,000		\$ 6,111,000		\$ 6,611,000	\$ -
Machinery & Equipment	\$ 499,415	\$ 95,000	\$ 4,565,250	\$ 194,000	\$ 5,064,665	\$ 289,000
Land Improvement	\$ 390,000		\$ 192,500		\$ 582,500	\$ -
Vehicles	\$ 1,125,000		\$ 619,800	\$ 1,145,000	\$ 1,744,800	\$ 1,145,000
	\$ 6,399,435	\$ 4,761,000	\$ 31,817,550	\$ 23,643,150	\$ 38,216,985	\$ 28,404,150

The ten-year capital plan will be utilized as the indicator of the infrastructure condition and costs to upgrade. Turner Valley has \$28.4M planned, and Black Diamond has \$38.4M planned. This will assist with addressing the infrastructure deficit between the two towns by comparing the future capital priorities.

JFAC Decision: that JFAC include under Topic #20 in the amalgamation negotiation report that the ten-year capital plan be utilized as the indicator of the infrastructure condition and costs to upgrade. For the ten-year capital plan, Turner Valley has \$28.4M planned, and Black Diamond has \$38.4M planned. This will assist with addressing the infrastructure variations between the two towns by comparing priorities in each municipality.

Topic # 21: Assessment Matters

Background: [Property assessments](#) occur annually by a certified contracted assessor appointed by the Province. The Province requires a review to determine if there is a need to treat current year property assessment differently for all or any portion of the proposed municipality.

Findings: As the incorporation date would be January 1, 2023, and both municipalities utilize the same contracted service provider, there would be no need to treat property assessment differently.

JFAC Decision: That JFAC include under Topic #21 in the amalgamation negotiation report that there is no need to treat property assessments differently since the incorporation date would be January 1, 2023.

Topic # 9 Other Matters

Background: Other Matters is a category that the Province provides for topics that Councils deem important to consider in making a decision. For Black Diamond and Turner Valley, this section includes:

1. the cost and savings of amalgamation,
2. utilities, and
3. the future build of the Westend Sewage Lagoon.

1. Costs and Savings of Amalgamation:

The costs and savings of amalgamation have been an important discussion topic surrounding the negotiation. Where possible, potential costs and savings have been included. Many possible one-time costs have been estimated in the 'Amalgamation Costs' chart on the following pages. Long term costs cannot be determined at this time as they will be based on the future decisions of administration and Council.

Estimated Cost Savings

There will be a reduction of one Council and one CAO. A service level review will be conducted by the new municipal Council and CAO. The results of the service level review will guide an organizational structure assessment to determine and identify the optimal requirements for the amalgamated municipality.

However, it must be noted that the future decisions of Council cannot be predicted. While we identify the possible efficiencies and/or additional costs related to amalgamation, decisions about whether those efficiencies or additional costs are realized will lie with future Councils and administrations. It is also expected that there will be some reduction in administrative costs by eliminating redundancies between the two towns, including financial audits, IT, software, hardware, and office equipment as demonstrated in the chart above. Assets including equipment and facilities will be reviewed for redundancies and efficiencies. The municipality will take advantage of economies of scale purchasing power and other utilities.

Upon approval of the amalgamation and through the transition period, a 1-to-3-year plan will be developed to guide administration and Council through the transition period by identifying key tasks necessary to move both towns forward as one. During this time frame, there may be other savings recognized.

NOTE: Not included in the charts below are potential savings related to policing costs, which can be found on the page 12. Also not included below are grant opportunities related specifically to amalgamation under the Alberta Community Partnership (ACP) program which are also listed on page 13.

Some potential annual savings have been estimated on the Estimated Amalgamation Savings and Costs table. Most long term savings can not be estimated at this time until a service level review is conducted and implemented.

ESTIMATED AMALGAMATION SAVINGS & COSTS - BLACK DIAMOND AND TURNER VALLEY

		<i>Pre</i>	<i>1-3 mo</i>	<i>1-2 years</i>	<i>Long Term Annual Savings</i>
	<i>Amalgamation Savings - Black Diamond and Turner Valley</i>				
<u>ADMINISTRATIVE</u>	Audit - amalgamated entity			-15,000	
<u>COUNCIL:</u>	IT - Software (eliminate redundancy)		-20,000		
	IT - Hardware (eliminate redundancy)				-20,000
	Office Equipment savings - postage meter / photo copiers			-12,000	
	One council - comprised of seven (7) members, six (6) councillors and one (1) mayor		-200,000	-200,000	-200,000
<u>GRANTS:</u>	Reduction of CAO role - Salary / wages / benefits / other costs / travel		-150,000	-150,000	-150,000
	Transition stream(Feasibility study and Maven Contract)	-250,000			
	RCP ACP Grant 1/2, BD 1/4, TV 1/4 -pd portion of Mavin	-32,500			
	Alberta Municipal Policing Assistance Grant			X	X
<u>ORGANIZATIONAL RESTRUCTURING:</u>	Debt Servicing / Infrastructure		X		
	Duplication of duties and responsibilities - unknown will require service level review / organization structure review			X	
	Review of amalgamated workforce, senior management team - unknown will require service level review / consultant assistance with organization structure			X	
	Expected Amalgamation Savings - Black Diamond and Turner Valley	-282,500	-370,000	-377,000	-370,000

BRANDING:	One Time Amalgamation Costs - Black Diamond and Turner Valley				
		Pre	1-3 mo	1-2 years	Long Term
	Logos / Branding	10,000			
	Community Entrance Signs, Buildings and other facilities, town flags			17,500	25,000
	Vehicle and equipment decals		8,100		
	Uniforms (CPO, Fire)		1,000	1,000	
	Mapping- GIS incorporation -		X		
	Domains (website)		200		
	Webpage development		50,000		
	Other Costs - name change/letter head/address change notices/printing costs/vehicle registries/Legal Seals/town stamps		5,000		
	MERGING:				
	Roll files (including actual moving) - Reorganization/creation of file storage to accommodate merged records		15,000		
	IT/Telus/compatibility of technology/computer software, merging or incorporating other users		10,000		
	Upgrade of phone system to accommodate additional lines and extensions for more staff		12,000		
	IT - merging and changing e-mails, servers, etc.		51,500		
	Accounting System - we use the same agency, but there will be a cost to merge the systems into a new data base	75,000	15,000		
	MOVE:				
	Deploying staff to different locations/ furniture/office equipment/renovations to accommodate staff in buildings		100,000		
	Infrastructure - electrical/wiring to expand space			50,000	
	CONSULTANTS:				
	Mavin - amalgamation consultant	200,000			
	Urban Systems (feasibility study)	134,000			
	HR consultant HR policies should be done/reviewed by an expert		125,000	175,000	
	LEGAL:				
	Any legal advice required when going through the bylaws/policies/contracts/alignment process		25,000	175,000	
	BANKING:				
	Banking requirements; selection/new cheques/deposits/information for vendors	X			
	COUNCIL:				
	Increased costs of Councils attending Amalgamation meetings	32,000			
	2022 Election	8,000			
	STAFF:				
	Severance packages - organizational structure review and development			X	
	OTHER:				
	Miscellaneous costs	25,000	25,000	25,000	25,000
	PLANNING:				
	Update of Planning documents			100,000	100,000
EXPENSES - ONE TIME COSTS		\$ 484,000	\$ 442,800	\$ 543,500	\$ 150,000

Policing Savings

With a population over 5000, an amalgamated municipality would be eligible for the Municipal Policing Assistance Grant. The Municipal Policing Assistance Grant assists communities with the financial costs of municipal policing and are available to municipalities with a population over 5001. Allocations are based on \$200,000 base payment plus \$8.00 per capita.

Prior to Amalgamation

<i>Police Funding Model - Requisition - municipal population based on 5,000 and under (Provincial Police Service Agreement with RCMP)</i>			
*Based on information received in 2020			
Towns - Pre Amalgamation			
Year	Black Diamond	Turner Valley	Total Both Towns
Payable 2020	56,446	54,632	111,078
2021	84,729	82,006	166,735
2022	112,891	109,263	222,154
2023	169,458	164,013	333,471

After Amalgamation

<i>Police Funding Model - municipal population based on 5,001 to 15,000 (Municipal Police Agreement with RCMP)</i>			
*Based on information received in 2020			
Year	New Municipality	Provincial Funding *	Net Amount - Post Amalgamation
Estimated Cost - 2023	550,000	(242,072)	307,928
Total	550,000	(242,072)	307,928
MPAG financial assistance is based on the following thresholds:			
*Towns and cities with a population from 5,001 to 16,666 receive a \$200,000 base payment plus an additional \$8.00 per capita.			
* Population baseline ~ Black Diamond 2,700 and Turner Valley 2,559 total combined 5,259 (based on 2016 Census)			
*Does not replace the Municipal Enforcement/CPO Costs			

The new municipality could recognize savings of \$25,543 under the new model based on a municipal population of 5,001 to 15,000.

Grants:

There are grant opportunities that will be available to assist with the amalgamation transition costs:

Alberta Community Partnership Funding (ACP):

Following the amalgamation, the new municipality can apply for this grant. In accordance with the currently available 2020/21 guidelines, \$1,200,000 is the total grant amount the new town would be eligible to apply for following the incorporation on January 1, 2023.

Grant totals could change based on program approval/guidelines in subsequent years, depending on provincial guidelines.

The grant is provided based on the following two streams:

- Transition Stream - base amount of \$100,000 plus \$500 per capita – to a max of 300 persons for a total of \$250,000
- Debt servicing/Infrastructure Stream– base amount of \$500,000 plus \$1,500 per capita - to a max of 300 persons for a total of \$950,000

Projects occurring as a result of restructuring should be completed within two years following the date of municipal restructuring.

Municipal Sustainability Initiative and Federal Gas Tax:

These are standing grants that the municipality can apply for as long as the criteria is met.

Municipal Sustainability Initiative (MSI) Allocations - Municipal restructuring will not affect funding allocations to municipalities for a defined period under the MSI program. In cases where amalgamation or dissolution has occurred (post April 1, 2007), the restructured municipality will receive a funding allocation equivalent to that which would have been calculated pre-restructuring for a subsequent five years, and any unexpended funding will be transferred to the amalgamated/receiving municipality.

MSI – Capital grant program will be replaced with the Local Government Fiscal Framework beginning in 2024-2025. In the subsequent five years or end of the program, whichever is earliest, any unexpended funds will go to the new municipality. The funding mechanism is 48% per capita/48% based on education property tax requisition/4% kilometers of local roads.

Federal Gas Tax Fund (FGTF) Allocations – is a permanent source of funding provided to provinces. The FGTF would continue to be calculated separately for five years. After five years the calculation of the FGTF would be based on one municipality. The funding for the FGTF is based on a per capita basis.

Topic 9 Other Matters: Utilities

Background: The Province does not specifically request information on utility rates. The Finance Subcommittee decided to review utility rates as part of the comprehensive financial comparison of the towns.

Findings:

- Black Diamond passed a [new utility rate](#) effective May 1, 2021 based on cost recovery.
- In 2019, the Town of Turner Valley introduced a new [Utility Rate Bylaw](#).
- Turner Valley is currently considering another utility rate review in 2021.

Current Utility Rates:

Town	Water	Sewer	Storm	Consumption
Black Diamond	\$44.94	\$44.94	NA	\$2.46 m ³
Turner Valley	\$25.67	\$33.79	\$10.05	* See below 3 Tier Rates

Turner Valley Consumptive Rates m ³	0 – 23 m ³	23.01 – 45 m ³	Over 46 m ³	Commercial
Water	\$1.86	\$1.93	\$2.00	\$2.00
Wastewater	\$2.64	\$2.66	\$2.67	\$2.70

Town	Waste Management – Solid	Waste Management - Recycle
Black Diamond	\$ 25.83	\$ 12.00
Turner Valley	\$ 28.00	\$ 12.00
Variance	\$ 3.83	\$ 0.00

JFAC Decision: That JFAC include under Topic #9 in the amalgamation negotiation report that the current utility rates for each municipality be continued until such time as a new utility rate bylaw is established.

Topic 9 Other Matters: Westend Regional Sewage Services Commission

Background: Westend Regional Sewage Services Commission was established in 1984 by regulation of the provincial government. To meet regulatory compliance, the Westend Lagoon Project is underway. This project is a required upgrade and is required regardless of amalgamation.

The estimated cost of the required Lagoon Project is \$17.4 million, and the estimated completion date is early 2023. Funding for this project through grants, reserves, and possible debentures.

Lagoon upgrade:

- Cost of project \$17.4 Million
- Grant amount \$11,952,792
- Westend Commission must come up with 27% of total project \$4,698,000
- Reserves end of 2021 \$964,726
- Possible Debenture amount \$3,250,500 payment schedule of 20 years.

Payment #	Payment	Principle	Interest	Balance
1	\$105,517.40	\$61,944.45	\$43,572.95	\$3,188,555.55

The Commission involves only two parties, Black Diamond and Turner Valley. Upon amalgamation, the Commission's status would have to be dissolved because a Commission must have two or more parties. The assets and liabilities of the Commission, including the new facility, would be incorporated into the new municipality.

JFAC Decisions:

That JFAC request Westend Regional Sewage Services Commission establish a bylaw as per MGA S609.09(1) and provide the bylaw for inclusion into the Negotiation Report.

That JFAC request Westend Regional Sewage Services Commission provide recommendations for the disestablishment date - upon incorporation or extension timeframe of the Commission.

APPENDIX 4

Local Authorities Consultation

List of Stakeholders

Example Stakeholder Letter

Responses:

- ATCO

- Town of Okotoks

- Fortis

- Foothills Search and Rescue

- Canada Post

List of Stakeholders

MUNICIPALITIES AND AGENCIES

AB Economic Development Trade & Tourism
AB Transport
Alberta Gaming, Liquor and Cannabis
Alberta Health Services
ATCO
Bow River Basin Council
Canada Post
City of Calgary
Community Futures Highwood
Crescent Point Foundation
Diamond Valley Chamber of Commerce
Eden Valley First Nation
Foothills County
Foothills Energy Coop
Foothills Lions Club
Foothills Regional Emergency Services Commission
Foothills Regional Services Commission
Foothills School Division
Foothills Search and Rescue
Fortis
Marigold Library Systems
MD of Willow Creek
Oilfields Food Bank
Oilfields General Hospital
RCMP Turner Valley
Rocky View County
Sheep Creek Arts Council
Sheep River Centre
Sheep River Health Trust
Sheep River Regional Utility Corp
Sheep River/Marigold Intermunicipal Library Board
Town of Black Diamond
Town of High River
Town of Nanton
Town of Okotoks
Town of Turner Valley
Turner Valley Legion
Turner Valley Oilfield Society
Valley Neighbours Club
Village of Longview
Westend Regional Sewage Services Commission
Westwinds Community (Highcountry Lodge, Glenmead)

List of Stakeholders

ADDITIONAL STAKEHOLDERS

1612178 Alberta Ltd o/a Cougar Creek Homes	Chuckwagon Cafe & Cattle Co.
2302028 ALBERTA INC.	CIR Realty
25Six Property Management	Co-Creative Works
A LIL R N R	Color Me Crazy
About Hair	Complete Bookkeeping & Tax Services
Absolute Surveys Inc	Cottage Music Studios
Adjunct Media Services	Country Store Diner
AG Foods - Country Food Mart	Coyote Moon Cantina Espresso, Yeji Restaurant & Bar
All About Packaging	Crafter's Corner Inc
ATB Financial	Crave Delivery
Atlantis Plumbing & Heating Ltd.	Crystal Salamon Art & Design Inc.
Avighna Innovations Inc	DAVG Consulting Inc
B & B Anderson Contracting Ltd.	Decks in a Day , Diamond Valley Decks & Smarthomes
Bach Door Music Studio	Demand Business Support
Baka Enterprises Ltd	Design Contractors Inc.
Bali Bling Gift Shop	Diamond In The Rough
Barnes & Crackle Massage	Diamond Valley Clothing Company
BBC Mechanical Plumbing & Heating	Diamond Valley Dental
Bell's Beauty Bar	Diamond Valley Disposal Ltd
Bentley Massage and Wellness	Diamond Valley Early Learning Centre
Bieber Agencies	Diamond Valley Electric Ltd
Black Diamond Building Centre Ltd. (Rona)	Diamond Valley Vision Care
Black Diamond Esso	Diamond West Sales
Black Diamond Gallery Inc.	Dishing the Cheer
Black Diamond Gospel Church	Donna Turner, RMT
Black Diamond Hotel	Dream Scapes Earth Management
Black Diamond Liquor	Dunning Imagery
Black Valley Services Ltd	East Link
Brauerei Fahr Inc.	Eastern Slopes Veterinary Services
Brewster West Industries Inc.	Eau Claire Distillery Ltd.
C.R.S. Spark	Eau Claire Distillery Speakeasy
CAECO Inc.	Eco Green Leaf Bar
Canadian BDx Inc	Eco Liquor
Carolina Homes	EHS System Solutions
CCR Creative Renovations	Enlightened Herb Cannabis
CEI-Safety	Exquisite Electric
Centered On Centre Avenue	Farside Electrical Mechanical Ltd
Century 21 Foothills Real Estate	Firebrand Glass
Chandra L. Flett Professional Corp.	First Place Feeds Ltd
Chelsea Vogel - Image Marketing	Flex Plumbing and Heating Inc.
Chin Up Cafe Ltd.	Foothills Auto & Truck Services Ltd.
Chinook Windz Healthy Pet & Horse Supplies	Foothills Consignment and Gifts
Chocolate by Cotton	Foothills Counselling Psychology Inc.
Chris' Handyman and Renovation Service	Foothills Kitchen Exhaust Cleaning

List of Stakeholders

Foothills Pizza & Pasta	Osprey Engineering Inc.
Formation Martial Arts, 10966096 Canada Inc.	Patronus
Glenda Sutherland Real Estate	Pharmasave
Granary Mouse Furniture Co	Plains Midstream
Granny's Pizza	Planet Auto
Griffith's Memorial Seniors' Centre	Polar Flash Energy Inc.
Healing 42	Pop's Barber Shop
Hi Ho Gas & Grocery - Yejin Corporation	Prairie Dog Dev
High Country Glassworks Ltd.	Quentin Brown
High Country News	Red Hen Studio
Hummel Concrete Ltd	Reliance Home Comfort
Immaculate Advantage	REMAX
Jansen Furnace & Duct Ltd	Rick's Bobcat Services
Jansen Plumbing Ltd	Rogers
Jaymont Development	Rollick Company
Jertyne Interior Services Ltd.	Royal LePage
Jessica's Closet	Rusty Spur Catering (483465 Alberta Ltd.)
Joy Hinman- Practitioner of Christian Science	Ryan Brothers Custom Homes/Ryco Homes
Kasl Industries	Saga Market
Kidco Construction Ltd	Sage Pottery
Kids Club Daycare	Salus Wellness Center Inc
Kids Connection Daycare	Save On Wine U-Brew
Kim Davies Realtor	Shaw
Koop's Autopro	Signs 'N' Such
Let Us Hit the Spot	Soft Rock Bistro
Little Chinook	Some Beach Somewhere Ltd.
Loral Energy Construction	Southern Alberta Law Offices
LUX Construction Ltd.	Span West Ventures Ltd
Mackinnon Electrical Ltd	St Michael's Church(ST James Okotoks)
Magpie Maggie	STARS
Mane Arts Salon	Stepping Stones Occupational Therapy
Marv's Classic Soda Shop	Strom Engineering Inc.
Maverick Electrical Service Inc	Sun Country 99.7 Radio, High River
Motoburrito	Sun Country Radio AM1140-Radio
Motorrad Performance	Sutherland (Developer)
Mountain View Village GP Ltd	Sweet Escape
My Wash Barn (1792740 AB Ltd.)	T. Williams Financial Services Ltd.
Navntoft Motorsport Inc	T&T Disposal Services
NJV Development Ltd	TASA Welding Ltd.
O'Leary Excavating Ltd., Pdraig O'Leary	TC Energy
Oberfeld Snowcap Real Estate Services	Telus
Offset Overland Ltd.	Tender Living Farm
OK Tire	Terry Allwarden
Okotoks Online	The Idea Garden
Okotoks Western Wheel	The Knot Whisperer
One On One Studio Ltd	The Shop (Turner Valley) Inc

List of Stakeholders

The Style Guild
The Westwood
Thyme For Massage
Todd's HandyWorks
Treeline Outdoors Inc.
True Grit Welding Ltd
Tuning Factory
Turner Developments
Turner Inn Restaurant (1841274 AB Ltd)
Turner Valley Bottle Depot (1931296 AB Ltd)
Turner Valley Golf & Country Club
Twisting Threads
Universal Carpentry Ltd.
Vale's Greenhouse Ltd
Valley Cold Beer & Liquor Store Ltd.
Votel Electric Ltd
Western Financial Group
Western Jib Inc.
Wood King
Woodmaster Homes Ltd.
Woodstock Hotel (915504 AB Ltd)



July 28, 2021

Name

Address

Email

RE: Amalgamation Input Requested

The Towns of Black Diamond and Turner Valley are in the early stages of amalgamation negotiations and are requesting input from stakeholders.

In September of 2020, the Towns of Black Diamond and Turner Valley presented a letter to Alberta Municipal Affairs to formally notify that the two existing municipalities will be commencing negotiations with the intent to amalgamate. The amalgamation process involves extensive review of information and data, and a final decision on whether to proceed or not will rest upon the outcomes of the review.

Request for Input:

The Towns are requesting feedback or questions from your organization on the potential amalgamation. Your input will enable the Towns to ensure all aspects of amalgamation are considered. Questions you may want to consider are:

- Is your organization impacted by a potential amalgamation by the Towns? How so?
- Do you have specific questions you would like to see answered through the amalgamation process?

Please respond within 30 days by email to either:

amalgamation@town.blackdiamond.ab.ca or amalgamation@turnervalley.ca.

Additional Information and Engagement:

The attached information sheet highlights key information about the amalgamation negotiations. Detailed information is provided at (www.turnervalley.ca and www.Town.blackdiamond.ab.ca).

You are also invited to attend any of the engagement events or participate in the activities over the next few months. All engagement events and activities will be advertised locally and on the Towns' websites.

Kick-off Engagement Event (Online)

Engagement Activity re: Electoral Wards
Engagement Activity re: Municipal Name
Engagement Event

Either March 30th or April 1st, 2021

March/April, 2021
March/April, 2021
June, 2021

We look forward to hearing from you.

Mayor Barry Crane
Town of Turner Valley

Mayor Ruth Goodwin
Town of Black Diamond

Amalgamation Fact Sheet

Overview:

- The prospect of amalgamation between Black Diamond and Turner Valley has been a matter of considerable discussion for many years, and was explored in 1988, 1991, 2005 and most recently in 2017.
- The Joint Friendship Agreement Committee (JFAC) is intent on amalgamating, however, a final decision will not be made until all related topics have been reviewed thoroughly by the JFAC. If at any point it does not seem prudent to proceed, the amalgamation negotiations will conclude.

Guiding Principles and Shared Objectives:

Guiding principles and shared objectives were established in the most recent [2017 Amalgamation Feasibility Study](#) developed by both Towns.

Guiding Principles:

- Balancing service levels with long-term cost,
- Joint decision making that is effective, adaptive, and based on honesty and integrity, and;
- Developing and implementing policies that are fact based, action focused, and achievable within a realistic and feasible timeframe.

The shared objectives are:

- Diversified and Resilient Economy: shared investment in strengthening the local economy;
- Integrated Policy Framework: aligning policies with shared growth objectives;
- Sustainable Service Delivery: more effective and efficient delivery of municipal services;
- Expanding Community Capacity: shared commitment to ongoing engagement with citizens, and;
- Responsive Local Governance: long-term and prioritized land and infrastructure planning.

Amalgamation Negotiation Process:

- The Province of Alberta requires information on a number of topics for a complete amalgamation application. Some topics are mandatory (i.e., municipal name, municipal boundaries), and some are transitional in that they range in anticipated timeframe for action (i.e., first election, compensation to other municipal authorities, financial transition, etc). Full detail is provided in the Public Information Paper hosted on both Towns' websites.
- For effective negotiations, JFAC created four subcommittees (Finance, Emergency Services, Procedure, and Public/Stakeholder Consultation). The subcommittees receive information from administration and stakeholders and make recommendations for final decisions to be made by JFAC.
- Engagement is also a requirement of the amalgamation application process. The amalgamation application must include: a description of the public consultation processes involved in the amalgamation negotiations, and a summary of the views expressed during the public consultation processes (regardless of whether they are positive/support, negative/oppose, or other).

- The Towns have decided to undertake more engagement than is required by the Province. Engagement includes requests for input from stakeholders through this letter; two engagement events; and two engagement activities. Full detail is provided in the Public Information Paper hosted on both Towns' websites.

Timelines:

Activity / Task	Approximate Timeline
Notification to Minister of Municipal Affairs	September, 2020
Negotiation Process Planning	October – November, 2020
Engagement Kick-off Communications	February, 2021
Engagement Kick-off Event	March, 2021
Engagement Activity re: Electoral Wards	March / April, 2021
Engagement Activity re: Municipal Name	March / April, 2021
Finance, Emergency Services & Procedure Subcommittees: Scoping, Assessment of Options, and Recommendations	December 2020 – April, 2021
Engagement Event	June, 2021
Anticipated Submission of Amalgamation Application to Minister of Municipal Affairs	September, 2021
Anticipated Order in Council	June, 2022
Anticipated Incorporation Date	January 1, 2023

How Can You Stay Informed and Provide Input:

- Regularly check the Public Information Paper posted on the Towns' websites as it will be updated throughout the negotiations (www.turnervalley.ca and www.Town.blackdiamond.ab.ca).
- Provide your feedback, input, and questions directly through the Town's emails (amalgamation@town.blackdiamond.ab.ca or amalgamation@turnervalley.ca)
- Attend or participate in any or all four engagement events and activities.
- Residents and stakeholders can also call the Towns to ask questions, request written copies of the information, or provide feedback by contacting either Turner Valley at 403-933-4944 or the Black Diamond Office at 403-933-4348.

Stakeholder response from ATCO

For the purposes of this report and to protect the privacy of individuals, identifying information has been replaced by 'xxxxx' where it occurs within the body of correspondence.

From ATCO representative to the Towns of Turner Valley and Black Diamond administration

Sent: March 11, 2020 2:36 PM

Subject: RE: ATCO Franchise renewal and Black Diamond Annexation

Sorry, I jumped the gun! Here's what you'll need (attached):

Proposed Agreement – this has been updated with all of the current language (no major changes from old template). If you're happy with the language, you'll need to determine the following:

1. Franchise fee. You have the option of changing it at the time of renewal, or it can stay the same.
2. Length of agreement. Anywhere from 10 to 20 years.
3. Start date. You can pick a start date based on when you think you'll do second and third readings of the bylaw in council. It will end up being the later of the date you pick, or the date of the readings in council.

Renewal Process – once you decide on the items above, let Travis Oliver (cc'd) know, and he will send you two unsigned copies of the agreement for you to initial each page. This is Step 1 of the formal renewal process.

Form of Application – used for Step 5 in the formal renewal process.

Bylaw Template – used for Step 3 in the process.

This should be everything you need to proceed. Let me or Travis know if you have any questions at all.

Thanks!

xxxxx

From the Towns of Turner Valley and Black Diamond administration to ATCO representative

Sent: Thursday, March 18, 2021 10:02 AM

Subject: RE: ATCO Franchise renewal and Black Diamond Annexation

Hi xxxxx,

I want to reach out to you to figure out how an amalgamation would impact the franchise agreement.

It looks like ATCO can provide written notice to the municipality not less than 12 months prior to the expiration of the Term of its intention to negotiate a new franchise agreement under clause 3, but it does not speak to if the municipality needs to amend the agreement.

The current rates for the franchise for BD are 16%, and TV is 15%, so they will need to be adjusted if Council moves forward with the application.

Can you please explain how the franchise fee agreement would be impacted in the event of amalgamation? – And what steps would each municipality take to amend their current agreements? An anticipated incorporation date January 1, 2023.

XXXXX

From ATCO representative to the Towns of Turner Valley and Black Diamond administration

Sent: March 19, 2021 9:13 AM

Subject: RE: ATCO Franchise renewal and Black Diamond Annexation

Hi XXXXX,

Good timing – I just replied to the Amalgamation Input Request email with comments on this exact subject.

A Municipality and ATCO can negotiate a new franchise agreement at any time as long as both ATCO and the Municipality are willing to do so, and we don't really need the 12 months. With that said, we should try and get plans in place sooner than later.

I believe we would need to move to one agreement for the amalgamated municipality. Here are some of my initial thoughts on what we'd need for the new agreement:

- A name for the amalgamated Municipality. I'm not really sure how that process works when two municipalities amalgamate, in terms of what the Province requires or how long that process takes, or what the two towns have planned for this. We'll defer to you on that front.
- A single franchise fee.
- A single method of collecting property tax on ATCO's linear assets. Right now, Black Diamond collects franchise fee in lieu of property tax and Turner Valley collects property tax separately from the franchise fee.
- Term of the agreement (10-20 years).
- Effective date of the agreement. We should be able to make that date Jan 1, 2023 assuming that's what you'd prefer. We can start the formal franchise agreement process in early 2022 to make sure the new agreement has time to make it through the AUC approval process well in advance of Jan 1.

We will likely have to follow the existing renewal process (Initialed unsigned agreement, 1st bylaw reading, Form of application to the AUC, advertisement in local papers, etc.), but we can confirm that closer to when we start the formal process in 2022. The two current agreements will remain in force until a new agreement is approved by the AUC.

I have a lot of franchise renewal experience but doing so with an amalgamated municipality is a new one for me! I'm looking forward to working through this process with Black Diamond and Turner Valley.

I've copied xxxxx from our Regulatory team – xxxxx, feel free to comment or add anything you think I've missed.

Best regards,

xxxxxx



From the Towns of Turner Valley and Black Diamond administration to ATCO representative

Sent: Friday, March 19, 2021 9:17 AM

Subject: RE: ATCO Franchise renewal and Black Diamond Annexation

Hi xxxxx,

The only question I have on the information below is the different ways in which Black Diamond and Turner Valley collect the franchise fee?

- *A single method of collecting property tax on ATCO's linear assets. Right now, Black Diamond collects franchise fee in lieu of property tax and Turner Valley collects property tax separately from the franchise fee.*

Why is this different?

Thanks,

xxxxxx

From ATCO representative to the Towns of Turner Valley and Black Diamond administration

Sent: March 19, 2021 9:39 AM

Subject: RE: ATCO Franchise renewal and Black Diamond Annexation

Hi xxxxx,

As per the AUMA template franchise agreement, a municipality has the choice to pick either method to clear ATCO's taxes. Somewhere along the line, each Town chose a different method.

Just to further explain the different options:

- If a community chooses franchise fee in lieu of tax, the community would clear ATCO's taxes owing from the collected franchise fee. This is shown as "Rider A" on a customer's bill.
- If a community chooses property tax separate from franchise fee, it's collected separately from franchise fee and shown as a separate Rider on the customer's bill (Rider B).

I believe the intent of having two options was to allow the municipality to have the choice and more flexibility in terms of what is collected from residents in their towns. Generally, franchise fee in lieu of property tax is seen as a simpler method requiring less administration. Regardless, it's totally up to each municipality how they'd like to collect the tax.

I've attached the current South Rate Schedule. Page 4 lists all of our South communities and their franchise fees, and page 5 lists those that collect property tax separately.

I hope this info helps. Don't hesitate to ask if you have any more questions.

XXXXX



ATCO GAS AND PIPELINES LTD.
ATCO GAS SOUTH
RATE SCHEDULES
January 1, 2021

ATCO GAS AND PIPELINES LTD. - SOUTH RATE SCHEDULES

INDEX

	Page
<u>Conditions</u>	
General Conditions	3
<u>Riders</u>	
Rider "A" Municipal Franchise Fee	4
Rider "B" Municipal Property Tax and Specific Costs.....	5
Rider "D" Unaccounted For Gas	6
Rider "E" Deemed Value of Gas	7
Rider "T" Transmission Service Charge.....	8
Rider "W" Weather Deferral Account Rider.....	9
<u>Delivery Service Rates</u>	
Low Use Delivery Service	10
Mid Use Delivery Service	11
High Use Delivery Service	12
Irrigation Delivery Service	13
<u>Other Service Rates</u>	
Emergency Delivery Service	14
Unmetered Gas Light Service	15

ATCO GAS AND PIPELINES LTD. - SOUTH GENERAL CONDITIONS

1. Approval of Alberta Utilities Commission (AUC):

Changes in Rates from time to time are subject to approval by the AUC for the Province of Alberta.

2. Special Contracts:

Unless varied by the AUC, service to Customers under Special Contracts shall be subject to the terms and conditions thereof.

3. Specific Facilities Conditions:

The Rates do not include extra costs incurred by the Company and payable by the Customer for Special Facilities or conditions requested by the Customer at the Point of Delivery.

4. Winter Period - Summer Period:

The winter period is the five calendar months from November 1 to March 31, and the summer period is the seven calendar months from April 1 to October 31.

5. Late Payment Charge:

When accounts are not paid in full on or before the due date within 15 business days of the statement date, the Company will apply a 1% penalty on the amount due. If the payment is not received by the next billing cycle, a 1% penalty will be applied to the balance carried forward (including prior penalties).

6. Terms and Conditions:

The Company's Customer and Retailer Terms and Conditions for Gas Distribution Service apply to all Customers and form part of these Rate Schedules.

7. DSP Rider F:

The words "DSP Rider "F" " as they appear on the Rate Schedules, shall mean the Default Supply Provider's Regulated Services Gas Cost Flow-Through Rate for ATCO Gas.

ATCO GAS AND PIPELINES LTD. – SOUTH RIDER "A" MUNICIPAL FRANCHISE FEE TO ALL RATES AND ANY OTHER RIDERS THERETO

All charges under the Rates, including any charges under other Riders, to Customers situated within the communities listed on this Rider "A" Municipal Franchise Fee are subject to the addition of the percentage shown. The percentage shown is to be applied as an addition to the billings calculated under the Rates including charges as allowed under other Riders in effect.

Method A. - Applied to gross revenues*.

Method C. - Applied to gross revenues* and Rider "E".

<u>Municipalities –</u>			<u>Effective</u>	<u>Municipalities</u>			<u>Effective</u>	<u>Municipalities –</u>			<u>Effective</u>
<u>Method A</u>			<u>Date</u>	<u>Method A</u>			<u>Date</u>	<u>Method C</u>			<u>Date</u>
	<u>%</u>	<u>yymmdd</u>			<u>%</u>	<u>yymmdd</u>			<u>%</u>	<u>yymmdd</u>	
Acme	20.00	04/03/10		Foremost	21.00	04/01/21		Calgary**	11.11	91/01/01	
Airdrie	29.60	07/10/01		Fort Macleod	12.50	01/10/02		Glenwood	5.26	94/10/01	
Banff	31.20	06/03/24		Gasoline Alley	19.50	20/05/01					
Banff Ntl Park	29.80	21/01/01		Granum	12.00	13/01/01					
Barnwell	13.00	01/01/18		High River	20.00	19/05/01					
Barons	14.97	00/08/21		Hill Spring	5.00	10/03/25					
Bassano	25.00	13/01/01		Hussar	25.00	12/02/17					
Beiseker	16.00	19/01/01		Innisfail	27.00	19/01/01					
Big Valley	12.00	16/03/01		Irricana	11.18	99/12/06					
Black Diamond	16.00	17/01/01		Lethbridge	27.00	12/02/15					
Bow Island	12.00	18/01/01		Linden	15.23	04/07/09					
Bowden	22.00	07/02/16		Lomond	25.00	15/12/01					
Brooks	19.50	21/01/01		Longview	20.00	16/01/01					
Burdett	15.00	20/04/01		Magrath	15.00	10/01/18					
Canmore	30.00	21/01/01		Milk River	30.00	04/12/14					
Carbon	15.07	00/09/18		Nanton	17.00	19/01/01					
Cardston	15.00	07/10/04		Nobleford	0.00	06/10/04					
Carmangay	15.00	10/03/02		Okotoks	20.00	21/01/01					
Carstairs	25.00	07/08/01		Olds	30.00	12/01/01					
Champion	15.00	10/03/02		Penhold	25.00	18/09/01					
Chestermere	17.00	14/01/01		Picture Butte	18.00	16/09/01					
Claresholm	10.00	05/05/05		Raymond	15.00	20/10/07					
Coaldale	13.00	15/01/01		Rockyford	30.00	12/01/01					
Coalhurst	8.85	20/01/01		Rosemary	16.00	16/05/01					
Cochrane	20.00	16/01/01		Standard	11.34	00/12/13					
Coutts	20.00	08/09/09		Stavely	11.00	21/01/01					
Cowley	13.79	02/08/23		Stirling	12.00	19/01/01					
Cremona	25.00	15/09/01		Strathmore	29.60	20/07/01					
Crossfield	17.00	10/05/07		Taber	18.00	20/07/01					
Crowsnest Pass	25.00	13/01/17		Taber*	33.00	20/07/01					
Delburne	21.60	07/04/10		Trochu	20.00	15/12/01					
Didsbury	25.00	10/01/01		Turner Valley	15.00	15/10/05					
Duchess	15.00	21/01/01		Vauxhall	10.00	20/02/01					
Elnora	16.00	04/05/27		Vulcan	35.00	14/01/01					

* Applied to High Use.

** Exemption available on Rider "E" portion of natural gas feedstock quantities used by an electrical generation plant whose primary fuel source is natural gas, for the commercial sale of electricity or used by a district energy plant for combined heat and power production, if deemed by the City of Calgary to be a qualifying facility.

ATCO GAS AND PIPELINES LTD. – SOUTH RIDER "B" MUNICIPAL PROPERTY TAX AND SPECIFIC COSTS TO ALL RATES AND ANY OTHER RIDERS THERETO

This Rider is applicable to Customers resident in municipalities that receive a property tax under the Municipal Government Act or receive payment for specific costs which are not generally incurred by the Company. This Rider is the estimated percentage of gross revenue required to provide for the tax payable or specific cost incurred each year. To the extent that this percentage may be more or less than that required to pay the tax or specific cost, the percentage of gross revenue provided in the Rider will be adjusted on the 1st of February each year.

The percentage is to be applied as an addition to the billings calculated under the Rates including charges as allowed under other Riders in effect with respect to the following municipalities:

<u>Municipalities</u>	<u>%</u>	<u>Effective Date yymmdd</u>	<u>Municipalities</u>	<u>%</u>	<u>Effective Date yymmdd</u>
Airdrie	3.30	20/02/01	Nanton	3.80	20/02/01
Banff, Municipality	0.10	20/02/01	Nobleford	1.10	20/02/01
Bassano	4.00	20/02/01	Olds	2.60	20/02/01
Big Valley	4.00	20/02/01	Penhold	3.70	20/02/01
Bow Island	3.90	20/02/01	Picture Butte	2.20	20/02/01
Brooks	4.10	20/02/01	Raymond	3.10	20/02/01
Canmore	1.70	20/02/01	Redwood Meadows	7.90	20/02/01
Cardston	3.60	20/02/01	Rockyford	2.90	20/02/01
Carmangay	8.10	20/02/01	Rosemary	6.90	20/02/01
Carstairs	2.90	20/02/01	Stavely	2.60	20/02/01
Champion	3.20	20/02/01	Stirling	3.50	20/02/01
Chestermere	1.90	20/02/01	Strathmore	2.10	20/02/01
Claresholm	4.50	20/02/01	Taber	3.00	20/02/01
Coaldale	2.60	20/02/01	Trochu	5.90	20/02/01
Cochrane	1.90	20/02/01	Turner Valley	5.00	20/02/01
Coutts	5.40	20/02/01	Vauxhall	4.60	20/02/01
Crowsnest Pass	7.00	20/02/01	Vulcan	5.20	20/02/01
Didsbury	2.70	20/02/01			
Duchess	4.10	20/02/01			
Elnora	6.30	20/02/01			
Foremost	3.80	20/02/01			
Fort Macleod	4.60	20/02/01			
Gasoline Alley	0.40	20/05/01			
Gratum	6.90	20/02/01			
Hill Spring	22.80	20/02/01			
Lethbridge	5.20	20/02/01			
Linden	8.80	20/02/01			
Lomond	6.90	20/02/01			
Milk River	6.40	20/02/01			

Effective November 1, 2020 by Decision 25798-D01-2020
This Replaces Rider "D"
Previously Effective November 1, 2019

**ATCO GAS AND PIPELINES LTD.
ATCO GAS RIDER "D" TO DISTRIBUTION ACCESS SERVICE CUSTOMERS
FOR THE RECOVER OF UNACCOUNTED FOR GAS (UFG)**

All Retailer and Default Supply Provider Customers utilizing Distribution Access Service for delivering gas off the ATCO Gas distribution system will be assessed a distribution UFG charge of 1.102% at the Point of Delivery. The UFG assessment will be made up "In-Kind" from each Customer Account.

Effective September 1, 2007 by Decision 2007-059
This Replaces Rider "E"
Previously Effective May 4, 2004

**ATCO GAS AND PIPELINES LTD. - SOUTH
RIDER "E" TO DELIVERY SERVICE RATES
FOR THE DETERMINATION OF THE "DEEMED VALUE OF NATURAL GAS"
FOR CALCULATION OF MUNICIPAL FRANCHISE FEE PAYABLE**

A Deemed Value of Natural Gas Rate will be applied to the energy delivered to Delivery Service Customers for the determination of municipal franchise fee payable by Customers in municipalities designated as Method "C" municipalities on Rider "A" of these Rate Schedules.

FOR ALL RATES:

The "Deemed Value" is an amount equal to the Gas Cost flow Through Rate specified on the DSP Rider "F".

Effective August 1, 2020 by Decision 25646-D01-2020
This Replaces Rider "T"
Previously Effective March 1, 2020

**ATCO GAS AND PIPELINES LTD.
RIDER "T" TRANSMISSION SERVICE CHARGE**

To be applied to the Low Use, Mid Use and High Use customers unless otherwise specified by specific contracts or AUC, effective August 1, 2020.

Low Use Delivery Rate	\$0.895 per GJ
Mid Use Delivery Rate	\$0.820 per GJ
High Use Delivery Rate	\$0.245 per Day per GJ of 24 Hr. Billing Demand

Effective September 1, 2020 by Decision 25666-D01-2020
This Replaces Rider "W" as approved in Decision 24465-D01-2019
Previously Effective September 1, 2019 to April 30, 2020

**ATCO GAS AND PIPELINES LTD. - SOUTH
RIDER "W" WEATHER DEFERRAL ACCOUNT RIDER**

To be applied to the Low Use and Mid Use customers unless otherwise specified by specific contracts or AUC, effective September 1, 2020 to April 30, 2021.

Low Use Delivery Rate	\$0.121 per GJ Credit
Mid Use Delivery Rate	\$0.099 per GJ Credit

ATCO GAS AND PIPELINES LTD. – SOUTH LOW USE DELIVERY SERVICE

Available to all customers using 1,200 GJ per year or less, except those customers who utilize the Company's facilities for emergency service only.

CHARGES:

Fixed Charge:	\$0.816 per Day
Variable Charge:	\$0.810 per GJ
Transmission Service Charge:	Rider "T"
Weather Deferral Account Rider:	Rider "W"

RATE SWITCHING:

A Low Use customer that consumes more than 1,200 GJ of natural gas annually but no more than 8,000 GJ annually for two consecutive years will automatically be switched to the Mid Use rate group without notice. ATCO Gas will notify the customers' retailers of any such rate switches.

Effective January 1, 2021 by Decision 26170-D01-2020
This Replaces Mid Use Delivery Service
Previously Effective January 1, 2020

ATCO GAS AND PIPELINES LTD. – SOUTH MID USE DELIVERY SERVICE

Available to all customers using more than 1,200 GJ per year but no more than 8,000 GJ annually, except those customers who utilize the Company's facilities for emergency service only.

CHARGES:

Fixed Charge:	\$0.816 per Day
Variable Charge:	\$0.804 per GJ
Transmission Service Charge:	Rider "T"
Weather Deferral Account Rider:	Rider "W"

RATE SWITCHING:

A Mid Use customer that consumes less than 1,201 GJ of natural gas annually for two consecutive years will automatically be switched to the Low Use rate group without notice. ATCO Gas will notify the customers' retailers of any such rate switches.

ATCO GAS AND PIPELINES LTD. - SOUTH HIGH USE DELIVERY SERVICE

Available to all customers using more than 8,000 GJ per year except those customers who utilize the Company's facilities for emergency service only.

CHARGES:

Fixed Charge:	\$4.831 per Day
Variable Charge:	\$0.00 per GJ
Demand Charge:	\$0.143 per Day per GJ of 24 Hr. Billing Demand
Transmission Service Charge:	Rider "T"
Customer Service Charge (if Applicable):	As per Schedule D Customer Service Letter Agreement

DETERMINATION OF BILLING DEMAND:

The Billing Demand for each billing period shall be the greatest amount of gas in GJ delivered in any Gas Day (i.e. 8:00 am to 8:00 am) during the current and preceding eleven billing periods provided that the greatest amount of gas delivered in any Gas Day in the summer period shall be divided by 2.

Provided that for a Customer who elects to take service only during the summer period, the Billing Demand for each billing period shall be the greatest amount of gas in GJ in any Gas Day in that billing period.

In the first contract year, the Company shall estimate the Billing Demand from information provided by the Customer.

CUSTOM SERVICE CONTRACT DEMAND:

For Customers that have executed a Custom Service Letter Agreement of the form of Schedule D of the Customer Terms and Conditions for Gas Distribution Service, the Billing Demand as noted above will be equal to the Contract Demand as specified in the Custom Service Letter Agreement.

RATE SWITCHING

Once a customer is billed under the High Use rate schedule, they will only be switched back to the Low or Mid Use rate schedule at the request of the customer. Only one switch per year will be allowed, and the effective date for the switch will be determined by ATCO Gas.

Effective January 1, 2021 by Decision 26170-D01-2020
This Replaces Irrigation Delivery Service
Previously Effective January 1, 2020

ATCO GAS AND PIPELINES LTD. - SOUTH IRRIGATION DELIVERY SERVICE

Available to all customers who use natural gas as a fuel for engines pumping irrigation water between April 1 and October 31.

CHARGES:

Fixed Charge:	\$1.150 per Day
Variable Charge:	\$1.038 per GJ

**ATCO GAS AND PIPELINES LTD. - SOUTH
EMERGENCY DELIVERY SERVICE**

CHARGES:

AUTHORIZED:

Fixed Charge: \$15.99 per Day

Variable Charge: Variable Charge of Low Use Delivery Service

Gas Cost Recovery: Highest cost of Gas purchased by the DSP on the Day of Sale, with a minimum price of the DSP Rider "F".

UNAUTHORIZED:

Fixed Charge: \$133.22 per Day

Gas Cost Recovery: Five (5) times the DSP Rider "F", with a minimum price of the highest cost of Gas purchased by the DSP on the Day of Sale.

Effective January 1, 2021 by Decision 26170-D01-2020
Previously Effective January 1, 2020

**ATCO GAS AND PIPELINES LTD. - SOUTH
UNMETERED GAS LIGHT SERVICE**

Applicable to all Customers with Company installed and approved gas lights.

Fixed Charge: \$0.096 per Mantle per Day

Stakeholder response from the Town of Okotoks

For the purposes of this report and to protect the privacy of individuals, identifying information has been replaced by 'xxxxx' where it occurs within the body of correspondence.

From the Town of Okotoks administration to the amalgamation dedicated emails

Sent: March 23, 2021 2:25 PM

Subject: Response from the Town of Okotoks

Thank you for requesting input from the Town of Okotoks in relation to the proposed amalgamation. In reviewing this proposal with our Council, we have the following questions in relation to the proposed amalgamation:

1. Have you requested advice on the proposed impact of amalgamation on your eligibility for membership to the Calgary Metropolitan Region Board(CMRB)? We believe you should be a voice at the table and would like CMRB membership considered as part of the amalgamation request.
2. The Town of Okotoks and the Town of Black Diamond currently have a partnership to deliver the 2023 Summer Games. Would the proposed amalgamation have any impact on this partnership or the involvement in the 2023 Summer Games?
3. The Town of Okotoks believes in the benefits and opportunities of delivering services on a regional basis. Do you anticipate any impacts on current shared delivery models (eg. Waste and Commissions) and will there be an opportunity to talk about other options for shared services going forward (examples like policing, municipal enforcement, water/wastewater).

If you have any questions in relation to these comments, please do not hesitate to reach out.

Thanks,

xxxxx



Stakeholder response from Fortis

For the purposes of this report and to protect the privacy of individuals, identifying information has been replaced by 'xxxxx' where it occurs within the body of correspondence.

From the Town of Black Diamond administration to Fortis Stakeholder Relations Manager

Sent: Friday, March 19, 2021 9:58 AM

Subject: [EXTERNAL] Franchise fees and Amalgamation

Hi xxxxx,

I want to reach out to you to figure out how an amalgamation would impact the franchise agreement.

The current rates for the franchise for BD and TV are both 10%, and the agreement will need to be adjusted if Council moves forward with the application.

Can you please explain how the franchise fee agreement would be impacted in the event of amalgamation? – And what steps would each municipality take to amend their current agreements? An anticipated incorporation date January 1, 2023.

xxxxx

Town of Black Diamond

PO Box 10, 301 Centre Ave W

Black Diamond, AB T0L 0H0

t. 403.933.4348

website: town.blackdiamond.ab.ca

From Fortis Stakeholder Relations Manager to the Town of Black Diamond administration

Sent: May 11, 2021 3:51 PM

Subject: RE: [EXTERNAL] Franchise fees and Amalgamation

Good Afternoon xxxxx,

After a few internal conversations exploring your question below and a recent meeting with our legal team to get some advice/direction, there appears to be a few potential options. While we were discussing options a couple of questions came up and depending on the answers could help recommend an approach.

1. Through the amalgamation process what happens to the existing municipal codes? Will each area keep it's current muni code? Or will a new code be issued?
2. Will this amalgamation effectively dissolve the current municipal structure enabling a net new Municipality or is it a situation where one Municipality succeeds and then incorporates the other.

Our Initial thoughts are:

- a. We could agree to terminate the 2 existing agreements and then sign the agreement template using the newly incorporated name and Municipal boundary
- b. We could amend one agreement and restate it to include the new territory while terminating the other agreement
- c. We can keep both agreements in place 'as is' until their initial term expires (Dec 31, 2026) at which time there is a trigger to extend the agreement and could revisit options at that time.

Let me know if you would like to schedule a phone call to discuss further.

Thanks,

xxxxx | Stakeholder Relations Manager

FortisAlberta | 15 Kingsview Road Airdire, AB T4A 0A8 |



We are FortisAlberta. We deliver the electricity that empowers Albertans to succeed. We keep the power on, not just because it's our job, but because we care about the people we serve. We are reliable, honest and dedicated to our work because our employees, customers and communities matter to us.

Stakeholder response from Foothills Search and Rescue

A representative of Foothills Search and Rescue responded to the amalgamation input request by phone with the following question and comment:

- Which callout system will be used?
- Foothills Search and Rescue would like confirmation but is okay with either one.

Stakeholder response from Canada Post

For the purposes of this report and to protect the privacy of individuals, identifying information has been replaced by 'xxxxx' where it occurs within the body of correspondence.

Internal communications - Canada Post

Sent: April 21, 2021 1:54 PM

Subject: Town Amalgamation

Good afternoon xxxxx,

I have been approached by Turner Valley Town asking for written confirmation that the Post Offices will be remaining if amalgamation of Turner Valley and Black Diamond go ahead. They need to know if there will be any changes to the mailing addresses.

Many thanks for your help.

xxxxx

Internal communications - Canada Post

Sent: April-22-21 8:42 AM

Subject: FW: Town Amalgamation

Good morning xxxxx,

I am wondering if this is something you can assist xxxx with the Town of Turner Valley with?

XXXX

Internal communications - Canada Post

Sent: April-22-21 8:54 AM

Subject: FW: Town Amalgamation

Hi xxxxx,

Can you please help me with the request below. Does an amalgamation change anything? I didn't think so but you never know! Lol thanks

Kind regards,

xxxxx

Manager, Government and Community Affairs (Alberta)
Canada Post Corporation



Internal communications - Canada Post

Sent: Friday, April 23, 2021 3:59:31 PM

Subject: RE: Town Amalgamation

Hi xxxxx,

Canada Post would not make any changes to current mailing addresses unless requested by the municipality.

Thanks,

xxxxx

Officer, Delivery Planning

From Canada Post Superintendent to the Town of Turner Valley administration

Sent: April 26, 2021 12:44 PM

Subject: FW: Town Amalgamation

Good Afternoon xxxxx,

Please see the message below from our delivery service planning officer in regards to the Amalgamation of Black Diamond and Turner Valley.

Thank you

xxxxx

From the Town of Turner Valley administration to Canada Post Superintendent

Sent: April 27, 2021 8:59 AM

Subject: RE: Town Amalgamation

Thank you so much for providing a written confirmation regarding "no change" to mailing addresses of the amalgamated communities of Turner Valley and Black Diamond.

xxxxx

APPENDIX 5

Engagement Strategy



ENGAGEMENT STRATEGY

TURNER VALLEY AND BLACK DIAMOND AMALGAMATION

DATE: January 21, 2021

TABLE OF CONTENTS:

Background:	3
Public Engagement:.....	4
Engagement Objectives:	4
General Approach:	5
Topics for Engagement:	6
Transitional Matters:.....	6
Stakeholders:.....	7
Risks & Mitigation:	12
Reporting:.....	14
Event Work Plans:	14

BACKGROUND:

In September of 2020, the Towns of Black Diamond and Turner Valley presented a letter to Alberta Municipal Affairs to formally notify that the two existing municipalities will be commencing negotiations with the intent to amalgamate. The prospect of amalgamation has been a matter of considerable discussion for several years, and was formally explored in 1988, 1991, 2005 and most recently in 2017.

As established in the most recent 2017 Amalgamation Feasibility Study developed by both the Towns, the guiding principles have been defined as:

- Balancing service levels with long-term cost;
- Joint decision making that is effective, adaptive, and based on honesty and integrity; and,
- Developing and implementing policies that are fact based, action focused, and achievable within a realistic and feasible timeframe.

The shared objectives are:

- Diversified and Resilient Economy: shared investment in strengthening the local economy;
- Integrated Policy Framework: aligning policies with shared growth objectives;
- Sustainable Service Delivery: more effective and efficient delivery of municipal services;
- Expanding Community Capacity: shared commitment to ongoing engagement with citizens; and,
- Responsive Local Governance: long-term and prioritized land and infrastructure planning.

In principle, there is agreement that both Towns are ready to take the next steps and forward the notice of intent to amalgamate. The Black Diamond annexation order in [Council 15/2020](#) allows for the contiguous border between the municipalities, which eases the process of defining the new municipal boundaries.

A timeline has been established to negotiate the mandatory items, as well as some of the transitional items which are required.

The timeline is as follows:

- **September 15, 2020:** Notification to the Minister of Municipal Affairs
- **September 2020 to August 2021:** Negotiation of the mandatory and transitional matters required in the Municipal Government Act (MGA)
- Anticipated submission of report and application, if proceeding, to the Minister of Municipal Affairs: **September 2021**
- Anticipated Order in Council: **June 2022**
- Anticipated Incorporation date: **January 1, 2023**

PUBLIC ENGAGEMENT:

For the duration of the amalgamation process, this document will outline the involvement and engagement for the public, stakeholders, and affected authorities. Due to the COVID-19 pandemic, new ways of reaching out and engaging the public will need to be considered for public consultation.

For public consultations, the MGA provides very simple requirements that must be completed as part of the amalgamation process. The method of consultation is not specified (e.g. a plebiscite is not required), but whatever methods/processes are used, they must be documented. The amalgamation application must include: a description of the public consultation processes involved in the amalgamation negotiations, and a summary of the views expressed during the public consultation processes (regardless of whether they are positive/support, negative/oppose, or other).

The MGA sections relevant to engagement are 105(1) (b) and (c):

Report on negotiations

105(1) On conclusion of the negotiations, the initiating municipal authority must prepare a report that describes the results of the negotiations and that includes

- (b) a description of the public consultation processes involved in the negotiations, and
- (c) a summary of the views expressed during the public consultation processes.

ENGAGEMENT OBJECTIVES:

Throughout the amalgamation process, communication will be concise, clear and transparent.

Engagement/communication outreach will inform all stakeholders in a timely and proactive manner, with a focus on:

- The amalgamation process (what is happening, why, when and how)
- Topics stakeholders will have input on; and,
- How that input will/did influence associated decisions

The process will be highly educative on the amalgamation topics being negotiated. Related information, in an easy-to-understand format, will be made available to the public.

Communication messaging and timing will be consistent between the two Towns through the entirety of the amalgamation process.

GENERAL APPROACH:

Due to current circumstances with COVID-19, most engagement efforts will be online. If and when an in-person event can be accommodated, feasibility and purpose will be assessed at that time. With so many unknowns and situations changing daily, it will be challenging to plan for in-person events. However, if an in-person event was to take place, it would most likely be in the final stages of the project -- possibly an in-person wrap up engagement event.

As part of the International Association of Public Participation (IAP2) Engagement Spectrum (see below), the amalgamation engagement will largely be at the “**Inform**” level. Comprehensive information will be distributed as part of a stakeholder education campaign as early as possible – educating the public on the process, content and decisions in real time. However, there will be select engagement points with stakeholders at both the “**Consult**” and “**Involve**” levels as well.

To ensure there is clarity on the various levels of engagement, the following from the IAP2 engagement spectrum has been added. The bulk of this strategy will fall under **Inform**, **Consult** and **Involve**.

IAP2'S PUBLIC PARTICIPATION SPECTRUM



The IAP2 Federation has developed the Spectrum to help groups define the public's role in any public participation process. The IAP2 Spectrum is quickly becoming an international standard.

INCREASING IMPACT ON THE DECISION 					
	INFORM	CONSULT	INVOLVE	COLLABORATE	EMPOWER
PUBLIC PARTICIPATION GOAL	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	To obtain public feedback on analysis, alternatives and/or decisions.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision making in the hands of the public.
PROMISE TO THE PUBLIC	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision. We will seek your feedback on drafts and proposals.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will work together with you to formulate solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.

© IAP2 International Federation 2014. All rights reserved.

TOPICS FOR ENGAGEMENT:

The following topics to be negotiated are ‘mandatory’ and determined prior to final application to Municipal Affairs. For further description on what each topic entails, follow [here](#). The bracket indicates the planned level of engagement for each topic:

Mandatory Negotiation Topics:

1. Municipal Name (*Involve*):
 - a. What would be the new name?
2. Municipal Boundaries (*Inform*)
3. Municipal Status (*Inform*)
4. Electoral Wards (*Involve*):
 - a. Community input/preference regarding Wards versus general representation
5. Council Representation (*Inform*)
6. Location of the Municipal Office (*Inform*)
7. Proposed Incorporation Date (*Inform*)
8. Annexation of Land to Achieve Contiguous Boundary (*Inform*)
9. Other Matters (TBD)

TRANSITIONAL MATTERS:

The following topics are labeled as ‘transitional’ items and will be considered throughout the amalgamation process. However, these items range in anticipated timeframe for required action. Some topics will need to be decided prior to final application to Municipal Affairs and some items will be deferred to Council after the amalgamation completion.

1. Interim Council (*Inform*): prior to application
2. Interim Chief Administrative Officer (*Inform*): prior to application
3. First Election (*Inform*): prior to application
4. 2021 General Municipal Election (*Inform*): prior to application
5. Appointment of Returning Officer(s) (*Inform*): prior to application
6. Ward Boundaries Review (*Inform/Consult*): TBD based on Ward Boundaries engagement
7. Compensation to other Municipal Authorities (internal discussions, not public): prior to application
8. Financial Transition (*Inform*): prior to application

9. Interim Tax Treatment (*Inform* as needed): prior to application
10. Tax Treatment (for previously annexed properties that have different tax considerations) (*Inform*): prior to application
11. Authority to Impose Additional Tax (to service pre-amalgamation debt) (*Inform*): prior to application
12. Assessment Matters (*Inform* as needed): prior to application
13. Employees and Labour Agreements (no public engagement): defer
14. Bylaws and Resolutions of Existing Municipalities (TBD): defer
15. Continuation of Emergency Services (*Inform*): prior to application
16. Library Services (*Inform* as needed): prior to application

STAKEHOLDERS:

The public consultation requirements for amalgamation state that Turner Valley and Black Diamond will jointly provide notice to all local authorities having jurisdiction to operate or provide services in our area. Additional stakeholders have been identified to meet the Towns' objectives of transparent engagement. **The following lists all identified stakeholders and the corresponding communication/engagement tactics:**

TURNER VALLEY AND BLACK DIAMOND COMMUNITY/RESIDENTS:

- General public as stakeholders

Tactics: Throughout the entirety of the process, residents (and all impacted stakeholders) will have on-line access to project information (*Inform*) and the opportunity to provide feedback and ask questions on all topics. Additionally, there will be two specific engagement activities with the intent to seek input (*Involve/Consult*), as well as two public events (planned to be on-line unless timing for final event permits in-person). One event will be held early in the process, while the other will be more of a wrap-up event:

- **Engagement Kick-Off**
 - Staff communication/session
 - Launch the Engagement Strategy
 - Real-time website updates: inform of the project and progress
 - Process education, points of contact for information: social media, BOLD signs, utility mailouts, newsletter
 - Release Public Information Paper (below)
 - Project Online Meeting #1 (RSVP/phone options available): brief presentation on content and process, Q&A, instant polling if applicable

- **Naming Activity (Storytelling)**
 - Seek/gather name ideas from the community, including schools, community groups, businesses and residents by requesting stories/pictures that reflect why their name choice should be chosen (submissions can be kept and used creatively)
 - Options will be narrowed down by the Stakeholder/Public Consultation Subcommittee (SCS) and the Joint Friendship Agreement Committee (JFAC)
 - Community polling to indicate preference
- **Ward Boundaries Activity**
 - Provide topic background information and options
 - Online polling for preference
- **Project Online Meeting #2 (In-person if able)**
 - Phone-in options available
 - Present the amalgamation content prior to finalization
 - Overview public comment, What Was Done Report
 - Q&A
 - Next steps and timing
- **Communication Tactics (ongoing, best tactic chosen for specific activities at time of event planning)**
 - Regular website updates, dedicated amalgamation page
 - Q&A section on website, respond as real time as possible
 - Public Information Paper (document that provides stakeholders with all relevant information on amalgamation process, content and decisions to date)
 - Bold Signs for notices
 - Town website information shared to Towns' social media (Facebook) with timing coordination
 - Western Wheel / Okotoks online, media releases
 - Electronic community newsletter (Black Diamond)
 - Mayor's newsletter (three editions before June)
 - Utility bill mailouts, separate page and different colour
 - Radio interviews with Mayors: the Okotoks Eagle and Sun Country
 - Hand delivering, as necessary
 - Phone contact for each Town
 - Posters

ADJACENT AND/OR NEARBY MUNICIPALITIES:

- Foothills County
- Town of Okotoks
- Village of Longview
- Hamlet of Millarville
- Eden Valley First Nation
- Town of High River
- Town of Nanton
- Rocky View County
- MD of Willow Creek
- City of Calgary

Tactics: Distribute (mail/email) a letter to Municipal Stakeholders informing of the intent to amalgamate, including a fact sheet that provides an overview of the process, opportunity to provide input and timeline with a link to the municipal website amalgamation pages, and a request to provide their specific feedback/questions within 30 days.

Through the Finance Subcommittee's recommendations, JFAC will determine municipal authorities that may require compensation as a result of amalgamation. Once identified, the most appropriate representatives can reach out with a phone call to set up discussions.

REGIONAL SERVICES:

- Foothills Regional Services Commission
- Sheep River Regional Utility Corp
- Westend Regional Sewage Services Commission
- Sheep River/Marigold Intermunicipal Library Board
- Foothills School Division
- Sheep River Health Trust
- Foothills Regional Emergency Services Commission (FRESC)

Tactics: Distribute (mail/email) a letter to Regional Services informing of the intent to amalgamate, including a fact sheet that provides an overview of the process, opportunity to provide input and timeline with a link to the municipal website amalgamation pages, and a request to provide their specific feedback/questions within 30 days.

THIRD PARTY UTILITIES/SERVICES:

- Canada Post
- Alberta Health Services
- AB Transport
- RCMP
- Alberta Gaming, Liquor and Cannabis
- ATCO
- Fortis
- Telecommunications: Telus, East Link, Shaw, Rogers
- Bow River Basin Council
- STARS
- Oilfield General Hospital
- Foothills Energy Coop
- Westwinds Community (Highcountry Lodge and Glenmead)
- Highwood Community Futures

Tactics: Distribute (mail/email) a letter to third party utility/service provider stakeholders informing of the intent to amalgamate, including a fact sheet that provides an overview of the process, opportunity to provide input and timeline with a link to the municipal website amalgamation pages, and a request to provide their specific feedback/questions within 30 days.

COMMUNITY GROUPS:

- Legion
- Boys and Girls Club
- Lions Club
- Griffiths Centre
- Valley Neighbours Club
- Sheep Creek Arts Council
- Youth with a Mission
- Churches

Tactics: Distribute (mail/email) a letter to local community groups stakeholders informing of the intent to amalgamate, including a fact sheet that provides an overview of the process, opportunity to provide input and timeline with a link to the municipal website amalgamation pages, and a request to provide their specific feedback/questions within 30 days.

LOCAL BUSINESSES:

- Diamond Valley Chamber of Commerce
- All local business owners
- Local oil and gas companies (Crescent Point, Conoco Phillips, Plains Midstream, TC Energy)
- Builders/Developers with local projects under way: review planning permit information for current developers
- Local realtors

Tactics: Through the business licensing data base in each municipality, send (mail/email) a letter to stakeholders that perform business within the two communities and surrounding area, informing of the intent to amalgamate, including a fact sheet that provides an overview of the process, opportunity to provide input and timeline with a link to the municipal website amalgamation pages, and a request to provide their specific feedback/questions within 30 days.

Approximate Engagement Timeline:

Activity/Event	Approximate Timeline
Strategy Approval (JFAC/MA/public)	End of January, 2021
Kick-off engagement	Early February, 2021
Letters to stakeholders	Late February, 2021
Public on-line event #1	Late February, 2021
Activity #1 (electoral wards)	Late February, 2021
Activity #2 (name)	Mid-March, 2021
Public On-line event #2	Mid-June, 2021

RISKS & MITIGATION:

The following barriers have been identified to ensure inclusive and successful engagement for the amalgamation process:

- **COVID-19**

Engagement during a pandemic creates a unique situation. In-person engagement events are not likely. Therefore, online engagement is the primary engagement tool. Not all people are comfortable with online engagement, some have little to no experience and don't know or understand the platforms (Zoom, Teams, Online Survey/Polling, etc.).

Online engagement efforts should include opportunities and time for participants to download appropriate software, learn, ask questions and test the tools.

- **Access to Technology**

Both Turner Valley and Black Diamond stakeholders are fairly tech-savvy. However, not everyone will have easy access to technology. All events held and material stored online will need to be advertised and distributed in varied manners – online and off. There will be a central amalgamation contact number for stakeholders to contact to become informed on the process, have their questions and comments documented and request materials be mailed/delivered.

- **In-person Events: Accessibility, Language**

If in-person engagement events are allowed at some point during the amalgamation process, venues will ensure accessibility for all participants and if language is a concern for any participants (either in-person or online), with notice, the project team will ensure the appropriate language support is in place.

- **Lack of Public Understanding**

Amalgamation discussion between the two communities has significant history. The most recent activity (letter to inform Municipal Affairs of intent to negotiate amalgamation, picking of a consultant, starting the amalgamation process, publicizing outcomes of decisions being made without communicating overall process) are already completed or are underway. The general public, stakeholders in both communities may not have a clear picture of what has happened to date, what is currently happening and what the next steps are.

It is crucial that communication to the public take place as soon as possible to address the above points. Timely and regular communication updates should subsequently occur in a manner that is transparent, predictable, informative and easy to understand (plain English).

- **Misinformation**

Throughout the course of the amalgamation process there will be a large amount of information delivered to the various stakeholders. Stakeholders may find the amount, and potential complexity of the material, to be overwhelming. Material may be misunderstood or recommunicated incorrectly, particularly on social media.

It will be important to focus on key messages and have the messages be factual, consistent, timely and transparent:

- **why** the decision was made to amalgamate;
- **what** the anticipated benefits may be;
- **what** the assessed risks are and associated mitigation; and
- **information** considered for each negotiated topic and associated decisions and rationale.

It is also recommended to designate an individual/group to monitor social media comments and concerns and to determine any common themes and how best to address. Responses will be handled through the Q&As, website, communication updates or other tactics that may be more relevant to the nature of the questions and concerns.

- **Inconsistent Messaging**

With communication coming from two separate Towns, information may be slightly different. Timing of information posting may also vary with one Town potentially distributing information before the other.

It will be vital to ensure a process is implemented to have identical communication released in similar fashion and timing. The engagement team will monitor the timing and content for all milestone communication tactics.

- **Staff Awareness and Involvement**

In addition to being impacted by the amalgamation process outcome, staff of both Towns will be looked to as sources of information for the stakeholders. The role of staff in successful process should not be overlooked.

As such, staff will be informed and updated prior to the general public/stakeholders for all outreach activity.

REPORTING:

Reporting is a critical component for the amalgamation process and will be included in the final report to Municipal Affairs. All comments, regardless of the activity and tool, will be collected and summarized in the *What We Heard Reports* (WWHRs).

- **WWHRs will document in detail:**
 - Q&A (website and events)
 - Event and activity input/comments (verbal and written)
 - Comments collected by project team/committee members/administration (verbal and written), if appropriate
 - If responses are provided, those will also be noted and tracked
 - Input will be collected in verbatim, where possible, and themed

WWHRs will be compiled after each activity/event and will include all other stakeholder input to date (website, etc.) A final WWHR containing all stakeholder input will be produced once engagement is complete.

This report will also include a **What We Did (WWD)** section that overviews how stakeholder input impacted JFAC decisions that were/are being made. WWHRs are made public and will be posted on the website on a regular basis.

EVENT WORK PLANS:

Prior to each large-scale engagement event/effort (stakeholder letter campaign, two public events, two targeted engagement activities), a further detailed event plan will be compiled that addresses individual activity approach and objective, outline required material, logistical planning, time frame, and identified roles and responsibilities.

APPENDIX 6

Communications:

- a) Public Information Paper
- b) Media Coverage
- c) Risks and Mitigation

APPENDIX 6a

Public Information Paper



PUBLIC INFORMATION PAPER

BLACK DIAMOND & TURNER VALLEY AMALGAMATION

July 9, 2021



HOW THIS PAPER WORKS:

The Public Information Paper provides a comprehensive and real time overview/update of:

- amalgamation background,
- process and timeframe,
- public engagement opportunities,
- links to stakeholder input,
- the technical data and information collected to make decisions on highlighted topics, and
- the decisions that are made by the Joint Friendship Agreement Committee (JFAC).

This paper will be updated throughout the entirety of the amalgamation process. When the paper is updated with new information, notification will be posted on the website as well as circulated through the most appropriate, timely communication tool available (town signage, social media, newsletter and/or utility mailouts). All new material will be highlighted in the 'New Material' Section once inserted. **New material added to the Public Information Paper are in green font at the time of addition and are black in future versions.**

Please check back regularly to ensure you have the most up to date information. Residents may wish to review all material posted on the websites by visiting the Town of Black Diamond at www.Town.blackdiamond.ab.ca or the Town of Turner Valley at www.turnervalley.ca. Residents can also call the towns to ask questions, request written copies of the information, or provide feedback by contacting either Turner Valley at 403-933-4944 or the Black Diamond Office at 403-933-4348.

TABLE OF CONTENTS

HOW THIS PAPER WORKS:	2
NEW MATERIAL:	3
PROJECT BACKGROUND:	4
AMALGAMATION PROCESS/TIMELINE:	5
WHY CONSIDER AMALGAMATION?	7
PAST COLLABORATION:	8
AMALGAMATION RISKS:	9
PUBLIC ENGAGEMENT APPROACH:	9
NEGOTIATION TOPIC INFORMATION UPDATES:	13
DECISIONS MADE:	14
SUMMARY:	17
APPENDIX A: SUBCOMMITTEE REPORTS TO JFAC **	18

****NOTE:** To eliminate duplication for the purposes of this Amalgamation Report to the Minister of Municipal Affairs, the items listed under Appendix A can be found in Report Appendix 7.

NEW MATERIAL:

- JFAC decisions made on March 10, 2021 (p. 13)
- JFAC decisions made on May 12, 2021 (p. 13)
- Updated Engagement Activities (June 15, 2021)
- Negotiation Topic Information Updates (p. 13 and Appendixes)
- JFAC decisions made on June 23, 2021 (p. 15)

PROJECT BACKGROUND:

The prospect of amalgamation between Black Diamond and Turner Valley has been a matter of considerable discussion for many years, and was explored in 1988, 1991, 2005 and most recently in 2017. Amalgamation related discussion has required extensive time, energy, and resources over the years from both Towns.

In 2012, the Towns created the Friendship Agreement, with the goal of promoting collaborative relationships and shared services. In early 2020, a decision to formalize the relationship with the creation of the Joint Friendship Agreement Committee (JFAC) and a deliberate move towards amalgamation was pursued. After much discussion, in September of 2020, the Towns of Black Diamond and Turner Valley presented a letter to Alberta Municipal Affairs to formally notify that the two existing municipalities will be commencing negotiations with the intent to amalgamate.

As established in the most recent [2017 Amalgamation Feasibility Study](#) developed by both the Towns, and as outlined in the [recent letter to Municipal Affairs](#), the guiding principles of the amalgamation process have been defined as:

- Balancing service levels with long-term cost,
- Joint decision making that is effective, adaptive, and based on honesty and integrity, and;
- Developing and implementing policies that are fact based, action focused, and achievable within a realistic and feasible timeframe.

The shared objectives are:

- Diversified and Resilient Economy: shared investment in strengthening the local economy;
- Integrated Policy Framework: aligning policies with shared growth objectives;
- Sustainable Service Delivery: more effective and efficient delivery of municipal services;
- Expanding Community Capacity: shared commitment to ongoing engagement with citizens, and;
- Responsive Local Governance: long-term and prioritized land and infrastructure planning.

The JFAC is intent on amalgamating, however, a final decision will not be made until all related topics have been reviewed thoroughly by the JFAC. If at any point it does not seem prudent to proceed, the amalgamation negotiations will conclude.

A third party, ***Maven Strategy***, was retained by the Towns in September of 2020 to manage the amalgamation process and facilitate negotiations.

AMALGAMATION PROCESS/TIMELINE:

Amalgamation is the process where two (or more) municipalities merge to become one. Reasons or rationale to do so are unique to each process. The amalgamation is negotiated between the communities. Under current legislation, the authority to amalgamate is provided under Division 5 of the Municipal Government Act (MGA).

The topics to be negotiated are listed below. For further description on what each topic entails, follow [here](#).

Mandatory Negotiation Topics:

1. Municipal Name
2. Municipal Boundaries
3. Municipal Status
4. Electoral Wards
5. Council Representation
6. Location of the Municipal Office
7. Proposed Incorporation Date
8. Annexation of Land to Achieve Contiguous Boundary
9. Other Matters

Transitional Matters:

These items range in anticipated timeframe for required action. Some topics will need to be decided prior to final application to Municipal Affairs and some items will be deferred to Council after the amalgamation completion.

1. Interim Council
2. Interim Chief Administrative Officer
3. First Election
4. 2021 General Municipal Election
5. Appointment of Returning Officer(s)
6. Ward Boundaries Review
7. Compensation to other Municipal Authorities
8. Financial Transition
9. Interim Tax Treatment
10. Tax Treatment (for previously annexed properties that have different tax considerations)
11. Authority to Impose Additional Tax (to service pre-amalgamation debt)
12. Assessment Matters
13. Employees and Labour Agreements
14. Bylaws and Resolutions of Existing Municipalities
15. Continuation of Emergency Services
16. Library Services
17. ICF Extension (specific to the Turner Valley/Black Diamond amalgamation)
18. Utilities (specific to the Turner Valley/Black Diamond amalgamation)
19. Westend Regional Sewage Services Commission (specific to the Turner Valley/Black Diamond amalgamation)

A preliminary timeline has been established for Black Diamond and Turner Valley to negotiate the mandatory items, as well as some of the transitional items which are required.

The Timeline is as Follows:

- **September 15, 2020:** Notification to the Minister of Municipal Affairs
- **September 2020 to August 2021:** Negotiation of the mandatory and transitional matters overviewed in the Municipal Government Act (MGA)
- Anticipated submission of the amalgamation report and application, if proceeding, to the Minister of Municipal Affairs: **September 2021**
- Anticipated Order in Council: **June 2022**
- Anticipated Incorporation date: **January 1, 2023**

Process Approach:

To ensure that all topics are reviewed thoroughly, four subcommittees have been established consisting of equal Council representation by both Towns and related administrative support from both Towns:

1. Finance Subcommittee
2. Public/Stakeholder Consultation Subcommittee:
3. Emergency Services Subcommittee
4. Procedure Subcommittee

Each subcommittee is responsible for reviewing all necessary information and making recommendations for their topics. Recommendations with supporting material will be brought forward from the subcommittees to JFAC for final decision-making.

Approximate Subcommittee Timeline (subject to change):

Committee	Approximate Timeline
Finance & Emergency Services Subcommittees	December 2020 – May 2021 Work plan generally includes: <ul style="list-style-type: none"> • December: Confirmed scope • January – February: Compile information needed • March: Assess options • April – May: Provide information to public on options • May: Final recommendations determined with presentation of recommendations to the JFAC in June
Procedure Subcommittee	December 2020 – April 2021 Work plan generally includes: <ul style="list-style-type: none"> • December: Confirmed scope • February: Final recommendations determined on topics not requiring significant information compiled - presentation of recommendations to JFAC in March • January – March: Compile information needed for specific topics • March – April: Provide information to public on options • April: Assess options, and make final recommendations - presentation of recommendations to the JFAC in May
Public/Stakeholder Consultation Subcommittee	December 2020 – June 2021 <ul style="list-style-type: none"> • Details provided on page 8

WHY CONSIDER AMALGAMATION?

Both Councils believe that success in one community is a success for the whole. As a result, Black Diamond and Turner Valley Councils feel it makes more sense to come together than to stay apart for many more specific reasons:

- There is a strong history of collaboration between the two Towns that has produced positive results. These positive results take a significant amount of intermunicipal coordination, dialogue, and in some cases duplication of effort. Now is the time to remove obstacles, streamline processes, achieve faster results, and strive to be as efficient and effective as possible in reaching shared goals.
- Provincial and Federal grants and funding will be reduced significantly in upcoming years. Through amalgamation and with a combined tax base, Black Diamond and Turner Valley will be able to maximize access to funding support and ultimately do more with the money received.
- Through amalgamation, there is an intent to continue to strengthen the area's economic development initiatives. A seamless approach will bolster local economic development with less duplication and direct competition. Both Councils want the communities to thrive in the short and long-term. Working together to ensure a healthy and diverse economy is key to making this a reality.
- Attracting the development industry is also important to the community's long-term sustainability. A united municipality will allow for comprehensive long-term and prioritized land and infrastructure planning.
- One municipality will provide efficiencies in roles and responsibilities, requiring only one CAO and one Council. This streamlines decision making, expedites timelines and provides a focused central approach.
- Until now, amalgamating would have created significantly more costs to policing. With the recent changes to the provincial funding model, this is no longer the case. Additional policing cost are now being downloaded to both municipalities regardless of amalgamation, but a population increase to over 5,000 would trigger a grant opportunity to offset any additional costs.
- A united municipality will create a single, larger entity providing a greater presence in representing the entire regional community, and a stronger unified voice in discussions with the provincial government, industry, and neighbouring municipalities.
- Where possible and where it makes sense economically, a more effective and efficient delivery of municipal services will be explored to ensure the level of service meets the expectations of the residents.

PAST COLLABORATION:

There is a strong history of collaboration between the two Towns that has produced positive results over the years. Black Diamond and Turner Valley are intricately linked in their day-to-day municipal dealings. Below are examples of how the communities currently operate in partnership:

- **Family and Community Support Services (FCSS) Committees**

In 2020, the Towns of Black Diamond and Turner Valley recognized that both municipalities were competing for much of the same FCSS work. Recognizing that the needs of both communities were very similar, the FCSS committee from each Town has taken steps to merge their respective committees, thereby reducing the overlap of administration, streamlining and clarifying the application processes for residents in need, and lessening the work required from its volunteer base.

- **Economic Development**

In May 2019, the Towns of Black Diamond and Turner Valley passed bylaws to establish an Intermunicipal Economic Development Committee (IEDC), comprised of two councillors from each Town and six members at large. The volunteers were recruited based on their expertise in the following areas:

- a strong business acumen and a keen desire to contribute to the economic enhancement of both communities;
- relevant experience as either a business owner or operator, and;
- solid understanding of tourism and its benefit to economic development.

The committee is currently implementing a joint marketing strategy for the region.

- **Regional Solid Waste Collection**

During the second half of 2020, the Towns of Black Diamond and Turner Valley partnered with the Town of Okotoks to regionalize garbage collection. The pilot project ended in January 2021 and was determined to be very successful. The three Towns have agreed to extend the program for an additional two years.

- **Fire**

Fire Service have reciprocal and mutual aid agreements that support working collaboratively together, including joint designation of Safety Codes powers. Currently, the Towns work together on fire responses when required depending on scale, complexity, and apparatus manpower requirements. When opportunities arise, the Towns also purchase equipment together. The Towns have similar bylaws and standards.

- **Emergency Management**

Both Towns are currently part of a regional mutual aid agreement that covers much of Southern Alberta. In addition, the Towns have similar bylaws, similar plans that address emergency management during a disaster and although typically the two departments don't interact unless called upon during an event, most events affect both communities so there is a large intent to support one another when able.

- **Water and Sewer Treatment**

Since 2013, Black Diamond and Turner Valley collaborate and equally cost share on the water treatment facility providing potable water to each Town. Each individual Town currently looks after its own distribution network.

Since 1994, the Towns collaborate and equally cost share on the wastewater treatment facility. Each municipality looks after its own collection network.

- **Facilities**

There are several facilities and services that the communities share because separately, the population may not warrant a single facility in each community. Together, the Towns have a reciprocal agreement that allows residents of both Towns to use the recreation facilities such as the pool in Turner Valley, the ice rink in Black Diamond, the library and recycling centre, just to name a few.

AMALGAMATION RISKS:

Although Councils see strong benefit to amalgamating, they are also aware that there is likely some risk. As such, there is commitment to a thorough review of all related amalgamation topics with the intent to clearly identify the benefits for the Towns, as well as any potential issues or risks. The information attached to the review process, as well as all decisions made by Councils, will be made transparent to the public and stakeholders.

PUBLIC ENGAGEMENT APPROACH:

For public consultations, the MGA provides very simple requirements that must be completed as part of the amalgamation process. A plebiscite is not required; however, whatever methods of consultation are used must be documented. The amalgamation application must include: a description of the public consultation processes involved in the amalgamation negotiations, and a summary of the views expressed during the public consultation processes (regardless of whether they are positive/support, negative/oppose, or other).

Engagement Objectives:

Throughout the amalgamation process, communication will be concise, clear and transparent. Engagement/communication outreach will inform all stakeholders in a timely and proactive manner, with a focus on:

- The amalgamation process (what is happening, why, when and how),
- Topics stakeholders will have input on, and;
- How that input will/did influence associated decisions.

The process will be highly educative on the amalgamation topics being negotiated. Related information, in an easy-to-understand format, will be made available to the public.

Communication messaging and timing will be consistent between the two towns through the entirety of the amalgamation process.

General Engagement Approach:

Due to current circumstances with COVID-19, most engagement efforts will be online. If and when an in-person event can be accommodated, feasibility and purpose will be assessed at that time. With many unknowns and situations changing daily, it will be challenging to plan for in-person events. However, if an in-person event was to occur, it would most likely be in the final stages of the project -- possibly an in-person wrap up engagement event.

As part of the International Association of [Public Participation \(IAP2\) Engagement Spectrum](#), the amalgamation engagement will largely be at the “*Inform*” level (to provide the public with balanced and objective information to assist them in understanding the topic, alternatives, opportunities and/or solutions). Comprehensive information will be distributed as part of a stakeholder education campaign as early as it is available – educating the public on the process, content and decisions in real time.

There will also be select engagement points with stakeholders at both the “*Consult*” (to obtain public feedback on analysis and/or decisions) and “*Involve*” levels (to work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered).

Stakeholders:

The Municipal Affairs public consultation requirements for amalgamation state that Black Diamond and Turner Valley will jointly provide notice to all local authorities having jurisdiction to operate or provide services in our area. Additional stakeholders have been identified to meet the Towns’ objectives of transparent engagement. The stakeholders have been organized into the following categories:

- Black Diamond and Turner Valley Community/Residents
- Adjacent and/or Nearby Municipalities
- Third Party Utilities/Services
- Community Groups
- Local Businesses
- Regional Services

Public and Stakeholder Input Opportunities:

Throughout the entirety of the process, residents (and all impacted stakeholders) will have on-line access to project information (***Inform***) and the opportunity to provide feedback and ask questions on all topics.

Additionally, there will be:

- *Activities*: Two specific engagement activities with the intent to seek input (***Involve/Consult***), and
- *Events*: Two public events (planned to be on-line unless timing for final event permits in-person). One event will be held early in the process, while the other will be a final stage event.

Stakeholder groups, other than the public, will receive a letter informing them of the intent to amalgamate, including a fact sheet that provides an overview of the process, opportunity to provide input and timeline with a link to the municipal website amalgamation pages, and a request to provide their specific feedback/questions within 30 days.

The two topics that the public will have direct input on the outcome are:

- the Municipality's new name, and;
- whether a ward or general election system is appropriate.

Communication Tools:

The best communication tool(s) will be chosen specifically for each individual engagement but may include:

- Regular website updates, a dedicated amalgamation page that contains updates after each JFAC meeting
- Q&A section on website
- Public Information Paper (this document that provides stakeholders with all relevant information on amalgamation process, content and decisions, updated regularly)
- Bold (street-side) and electric signs
- Social media (Facebook)
- Electronic community newsletter
- Posters in key community locations
- Utility bill mailouts
- Local media including radio and print

Approximate Engagement Timeline (subject to change):

Activity/Event	Approximate Timeline
Kick-off engagement	Mid February, 2021
Letters to stakeholders	March, 2021
Public on-line event #1	March 30 & April 1, 2021
Activity #1 (electoral wards or general)	June, 2021
Activity #2 (name)	June, 2021
Public On-line event #2	July, 2021

Engagement Reporting:

Reporting is a critical component for the amalgamation process and will be included in the final report to Municipal Affairs. All comments, regardless of the activity and tool, will be collected and summarized in the *What We Heard Reports* (WWHRs).

- WWHRs will document in detail:
 - Q&As (from the Towns' websites and from the amalgamation events)
 - Amalgamation event and activity input/comments (verbal and written)
 - Additional comments collected by project team/committee members/administration (verbal and written), if appropriate

WWHRs will be compiled after each activity/event and will include all other stakeholder input to date (website, etc.). A final WWHR containing all stakeholder input will be produced once engagement is complete.

This report will also include a What We Did (WWD) section that overviews how stakeholder input impacted JFAC decisions that were/are being made. WWHRs are made public and will be posted on the website on a regular basis.

After each event, links to these reports will be found here:

- [What We Heard Report](#)

NEGOTIATION TOPIC INFORMATION UPDATES:

As information is generated by Town administrations, each subcommittee (finance, public/stakeholder consultation, emergency services, procedures) will provide updates on the negotiation topics. These overviews of data and material will be made available to the public through this section.

The information developed through the process are summarized in the Finance Report to Public (June 30, 2021) or each subcommittee's report to JFAC outlining their recommendations. Based on the debate at JFAC, decisions can and are different than the subcommittee recommendations. The final JFAC decisions are in the section below, Decisions Made.

In addition to this information, a FAQ is available.

[Black Diamond FAQ](#)

[Turner Valley FAQ](#)

The Subcommittee Reports to JFAC are listed here including each topic addressed and the full reports are included in Appendix A:

1. March 10, 2021: Procedure Subcommittee Report on:
 - Bylaws and Resolutions of Existing Municipalities
 - First Election
 - Interim Council
 - Intermunicipal Collaboration Framework (ICF) Extension
2. May 12, 2021: Emergency Services Subcommittee Report on:
 - Emergency Services Level of Services
3. May 12, 2021: Procedure Subcommittee Report on:
 - Returning Officer
 - Labour and Human Resources
4. June 23, 2021: Procedure Subcommittee Report on:
 - Interim CAO
 - First Election - amendment
 - Library
5. June 30, 2021: Finance Report to Public:
 - [Black Diamond Finance Report](#)
 - [Turner Valley Finance Report](#)
 - Compensation to other Municipal Authorities
 - Financial Transition
 - Interim Tax Treatment
 - Tax Treatment (for properties previously annexed that have different tax considerations)
 - Authority to Impose Additional Tax (to service pre-amalgamation debt) and considers infrastructure deficits and assets (including debentures, reserves, and condition of infrastructure), and capital equipment purchases
 - Assessment Matters

- Other Matters:
 - Costs and Savings of Amalgamation
 - Utilities
 - Westend Regional Sewage Services Commission
- 6. June 23, 2021: Public/Stakeholder Consultation Subcommittee Report and Summary Graphic on:
 - Electoral Wards
 - Ward Boundaries Review
- 7. June 23, 2021: Public/Stakeholder Consultation Subcommittee Report and Summary Graphic on:
 - Naming

DECISIONS MADE:

The JFAC has negotiated the following topics and formal motions were made to include them in the potential amalgamation application to the Minister. Moving forward, as decisions are made, they will be updated here.

Decisions made on November 19, 2020:

1. **Municipal Status:** the new municipality will be a Town. This is consistent with the Municipal Government Act's definition for Town.
2. **Incorporation Date:** the new municipality will be incorporated on January 1, 2023.
3. **Elected Officials Representation:** the new municipality will be represented by seven (7) elected officials. Most municipalities, especially Towns, have seven (7) elected officials.
4. **Municipal Boundaries:** the current boundaries of both Towns will form the proposed municipal boundaries.
5. **Contiguous Border:** there currently is a contiguous border and so no further changes are required.
6. **Municipal Office:** all current municipal buildings in both Towns will remain active, but the main municipal office will be in Black Diamond at: 301 Centre Avenue West.

Decisions made on March 10, 2021:

7. **Bylaws and Resolutions of Existing Municipalities:**
 - a. The municipalities will defer updating the bylaws and resolutions until the post-amalgamation timeframe.
 - b. JFAC agreed to direct administration to inventory bylaws and resolutions to determine priorities for alignment in the pre-amalgamation timeframe and further the timeline for this task will be dependent on administration capacity but is expected to be complete by September 2021.
8. **First Election:** the first election for the amalgamated municipality would occur in Q4 of 2022.
9. **Interim Council:** If the first election is held in Q4 2022, no interim council will be required.
10. **Intermunicipal Collaboration Framework (ICF) Extension:** the application will include confirmation that the ICF deadline has been previously extended until April 1, 2022, and if the amalgamation application is submitted, the Towns will request an adjusted deadline for an ICF between the new municipality and Foothills County.

Decisions made on May 12, 2021:

- 11. Emergency Services Level of Services:** JFAC agreed to include in the amalgamation application report that the level of service will be maintained for three branches of Emergency Services which includes Fire, Emergency Management and Community Peace Officers in both Black Diamond and Turner Valley until incorporation date and maintain service levels until such time as the new CAO and the new Council determines the service levels and organizational structure.
- 12. Returning Officer:** JFAC agreed to recommend in the amalgamation application report that the current Returning Officer of Black Diamond, Verna Staples will act as the Returning Officer for the Q4 2022 election of council for the newly amalgamated municipality.
- 13. Employees and Labour Agreements:** JFAC agreed to include in the amalgamation application report that all employees at the time of amalgamation will become employees of the new municipality to ensure uninterrupted service delivery until such time as the CAO, in conjunction with the Council elected in 2022, have determined service levels and organizational structure.
- 14. First Election:** JFAC agreed to request the Procedure Subcommittee consider a date of the 2022 election to be recommended in the amalgamation application report.

Decisions made on June 23, 2021:

- 15. Interim Chief Administrative Officer:**
 - a. JFAC agreed to recommend the current CAO of Turner Valley, Shawn Patience, be named in the Amalgamation Negotiation Report as Interim CAO.
 - b. JFAC agreed to recommend the current CAO of Black Diamond Sharlene Brown be named in the Amalgamation Negotiation Report as a secondary option for Interim CAO.
- 16. First Election (amendment):**
 - a. JFAC agreed to recommend that a Q4 election date of November 28, 2022 for a new Council of the amalgamated Town and that this is the preferred option to be included in the ministerial order.
 - b. JFAC agreed to strongly support the resolution for the Q4 election of 2022 in the Report on Amalgamation as a reduction of one Council is part of the cost saving measures and operating efficiency supporting the amalgamation process.
 - c. JFAC agreed to provide an alternative recommendation in the Negotiation Report inclusive of a fourteen (14) member Council comprised of the council elected in October 2021, with a Mayor being appointed from those fourteen (14) sitting Council members (MGA 150) for a period of 90-120 days after incorporation.
- 17. Library Services:** JFAC agreed to recommend the continuation of library services after the date of incorporation of the new municipality.
- 18. Compensation to other Municipal Authorities:** JFAC agreed to include under Topic 16 in the amalgamation negotiation report that the amalgamated municipality would be required to pay Foothills County \$32,154/year until 2024 (for previous contractual agreements which include annexation agreements, and municipal road maintenance agreement) after which time the payment would be reduced to \$10,000/year with the last payment made in 2030.

- 19. Financial Transition:** JFAC agreed to include under Topic #17 in the amalgamation report to the province that independent audits be conducted for Black Diamond and Turner Valley for the year ending December 31, 2022, and further that an audit will be conducted for the newly created town as at December 31, 2023.
- 20. Interim Tax Treatment:** JFAC agreed to include under Topic #18 in the amalgamation negotiation report to the province that no interim tax treatment is required since incorporation date would be Jan. 1, 2023.
- 21. Tax Treatment:** JFAC agreed to include under Topic #19 in the amalgamation negotiation report that for the lands annexed by Black Diamond to unify a boundary between Black Diamond and Turner Valley, for the purposes of taxation in 2020 and in each subsequent year up to and including 2044, these lands must be assessed as if in the County of Foothills and taxed as if in the County of Foothills, until a triggering event noted in the agreement.
- 22. Authority to Impose Additional Tax:**
- a. JFAC agreed to include under Topic #20 in the amalgamation negotiation report that the Local Improvement levies remain with the Town of Turner Valley properties until such time as they are paid in full.
 - b. JFAC agreed to include under Topic #20 in the amalgamation negotiation report that operating revenues continue to support the existing debts of both municipalities before and after amalgamation.
 - c. JFAC agreed to include under Topic #20 in the amalgamation negotiation report that designated capital reserves remain in the individual municipalities until they are utilized. All existing undesignated capital reserves should be designated to restricted dedicated reserves contained within their 10-year capital plans prior to incorporation date. Operating reserves should be contributed to equally based on Black Diamond and Turner Valley's requirements with the remainder to be designated to capital reserves.
 - d. JFAC agreed to include under Topic #20 in the amalgamation negotiation report that the ten-year capital plan be utilized as the indicator of the infrastructure condition and costs to upgrade. For the ten-year capital plan Turner Valley has \$28.4M planned and Black Diamond has \$38.4M planned. This will assist with addressing the infrastructure variations between the two towns by comparing priorities in each municipality.
- 23. Assessment Matters:** JFAC agreed to include under Topic #21 in the amalgamation negotiation report that there is no need to treat property assessments differently since the incorporation date would be Jan. 1, 2023.
- 24. Utilities:** JFAC agreed to include under Topic #27 in the amalgamation negotiation report that the current utility rates for each municipality be continued until such time as a new utility rate bylaw is established.
- 25. Westend Regional Sewage Services Commission:**
- a. JFAC agreed to request Westend Regional Sewage Services Commission establish a bylaw as per MGA S609.09(1) and provide the bylaw for inclusion into the Negotiation Report.
 - b. JFAC agreed to request Westend Regional Sewage Services Commission provide recommendations for the disestablishment date - upon incorporation or extension timeframe of the commission.

26. **Electoral Wards:** JFAC agreed to recommend under Topic #4 in the amalgamation report to the province that an 'at large' electoral representation be the preferred format for the 2022 Q4 election as opposed to dividing the new municipality into electoral wards.
27. **Ward Boundary Review:** JFAC agreed to recommend under Topic #15 in the amalgamation report to the province that a ward boundary review will not be required due to the determination to hold an 'at large' election in Q4 2022 as a result of the public consultation.
28. **Name:** JFAC agreed to propose the name 'Town of Diamond Valley' as the name of the amalgamated municipality in the amalgamation negotiation report to the province pending confirmation of the legal use of the name.

SUMMARY:

This paper serves as an overview of the entire amalgamation process and acts as one point of reference for information as it evolves and becomes available. Please check back regularly for updates.

Contact Information:

Residents may review all material posted on the websites by visiting the Town of Black Diamond at www.Town.blackdiamond.ab.ca or the Town of Turner Valley at www.turnervalley.ca.

Residents can also call the Towns to ask questions, request written copies of the information or provide feedback by contacting either the Black Diamond Office at 403-933-4348, or the Turner Valley Office at 403-933-4944.

APPENDIX A: SUBCOMMITTEE REPORTS TO JFAC

1. March 10, 2021: Procedure Subcommittee Report
2. May 12, 2021: Emergency Services Subcommittee Report
3. May 12, 2021: Procedure Subcommittee Report
4. June 23, 2021: Procedure Subcommittee Report
8. June 23, 2021: Public/Stakeholder Consultation Subcommittee Report and Summary Graphic on:
 - Electoral Wards
 - Ward Boundaries Review
9. June 23, 2021: Public/Stakeholder Consultation Subcommittee Report and Summary Graphic on:
 - Naming
10. June 30, 2021: Finance Report to Public

NOTE: To eliminate duplication for the purposes of this Amalgamation Report to the Minister of Municipal Affairs, the items listed on this page can be found in Report Appendix 7.

APPENDIX 6b

Media Coverage

Email mailout graphics

Web banners

Social media posts

Media articles



AMALGAMATION PROCESS

BLACK DIAMOND - TURNER VALLEY

Join Us!



SCAN THE QR CODE OR GO TO
THE LINK BELOW TO REGISTER:

<https://www.surveymonkey.com/r/N72L5Z2>

ENGAGEMENT KICK-OFF: ONLINE PUBLIC MEETING



THE PROCESS

Black Diamond & Turner Valley, with the intent to amalgamate, have begun the process to closely examine the impacts of potentially amalgamating the Towns.



LEARN MORE

To learn more, ask questions & provide input on topics you feel need to be considered, please attend one of the two online public kick-off sessions.



SESSIONS:

March 30, 2021

6:30 p.m. – 7:30 p.m.

April 1, 2021

10:30 a.m. – 11:30 a.m.

Note: Both meetings will cover the same information.

PUBLIC INFORMATION PAPER

Available on both Town websites to help all residents stay informed about Amalgamation proceedings.

QUESTIONS? EMAIL US!

Email questions to the addresses below:

amalgamation@town.blackdiamond.ab.ca

amalgamation@turnervalley.ca



UPCOMING ACTIVITIES

Additional public activities will be held in the spring and in the early summer of 2021 to report back on the Amalgamation process. Announcements will be made when these event dates are confirmed.

MORE INFORMATION

www.town.blackdiamond.ab.ca

403.933.4348

www.turnervalley.ca

403.933.4944



AMALGAMATION PROCESS

BLACK DIAMOND - TURNER VALLEY

You're Invited

REPORT BACK: ONLINE PUBLIC MEETING



REPORT BACK

Black Diamond and Turner Valley have completed the detailed exploration of potential amalgamation impacts between the Towns. The Joint Friendship Agreement Committee (JFAC) is ready to report back to the public.



LEARN MORE

An online public meeting has been scheduled to provide the communities with an opportunity to learn more about the outcomes of the amalgamation process and ask questions.



AMALGAMATION DECISION

The final decision to amalgamate will be made by each Town Council in September 2021.

MEETINGS:

July 22, 2021

10:30 a.m. – 11:30 a.m.

6:30 p.m. – 7:30 p.m. *or*

Note: Both meetings will cover the same information.



**SCAN THE QR CODE OR GO TO
THE LINK BELOW TO REGISTER:**

<https://www.surveymonkey.com/r/6QJCJH8>

MORE INFORMATION

www.town.blackdiamond.ab.ca
403.933.4348

www.turnervalley.ca
403.933.4944



REGISTRATION

You must register to attend one of the two meetings. Please go to the above link, or scan the QR code to register.



MEETING RECORDING

If you can't attend either of these meeting times, a recording will be posted on both Town websites.



QUESTIONS? EMAIL US:

amalgamation@town.blackdiamond.ab.ca
amalgamation@turnervalley.ca


WEB BANNERS


AMALGAMATION PROCESS


BLACK DIAMOND - TURNER VALLEY

You're Invited!




ENGAGEMENT KICK-OFF: ONLINE PUBLIC MEETING

 Black Diamond & Turner Valley, with the intent to amalgamate, have begun the process to closely examine the impacts of potentially amalgamating the Towns.

 **LEARN MORE**
To learn more, ask questions and to provide input on what topics you feel need to be considered, please attend one of the two kick-off online public sessions.

 **March 30, 2021 6:30 p.m. - 7:30 p.m.**
April 1, 2021 10:30 a.m. - 11:30 a.m.

Note: Both meetings will cover the same information.



SCAN THE QR CODE OR GO TO THE LINK BELOW TO REGISTER:
<https://www.surveymonkey.com/r/N72L522>

QUESTIONS? EMAIL US!

amalgamation@town.blackdiamond.ab.ca
amalgamation@turnervalley.ca

PUBLIC INFORMATION PAPER

Available on Town websites to help all residents stay informed about Amalgamation proceedings.

MORE INFORMATION

www.town.blackdiamond.ab.ca
403.933.4348

www.turnervalley.ca
403.933.4944

AMALGAMATION PROCESS

BLACK DIAMOND - TURNER VALLEY

Updated Documents!

Updates to topics of interest related to the potential amalgamation are posted HERE:

1. Financial report
2. Updated Public Information Paper: Includes all negotiation outcomes
3. Updated FAQ
4. Engagement results: Detailed overview
5. Upcoming public meeting: Details



QUESTIONS? EMAIL US:

amalgamation@town.blackdiamond.ab.ca
amalgamation@turnervalley.ca




MORE INFORMATION

www.town.blackdiamond.ab.ca
403.933.4348


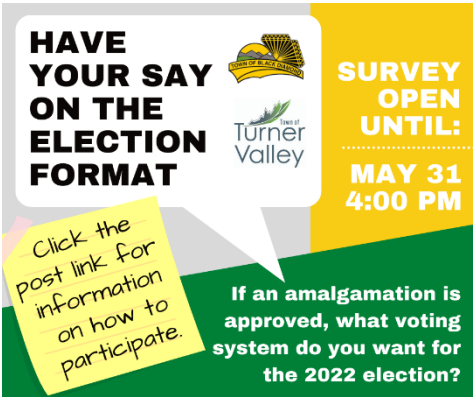
www.turnervalley.ca
403.933.4944


SOCIAL MEDIA POSTS
BD/TV AMALGAMATION POSTS


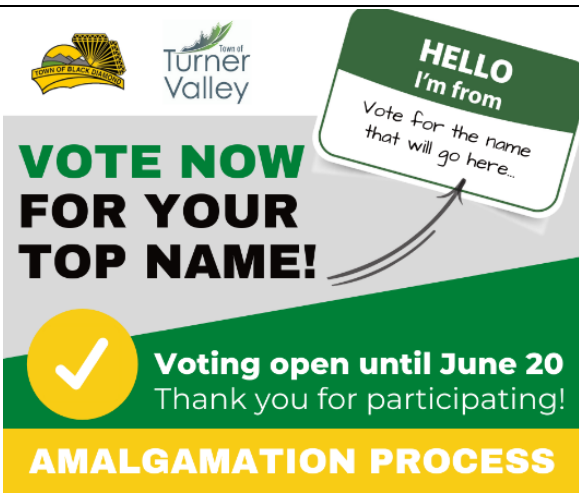
DATE:	POST DRAFT:	IMAGE:
March 10 Save-the-date	<p>Interested in learning more about the process of the Black Diamond, Turner Valley potential amalgamation?</p> <p>Two engagement kick-off meetings are planned, and we hope to see you there – virtually of course!</p> <p>Save the Date and attend one of the two online sessions. More information will follow on how to register.</p> <p>#LetsTalkBDTV #TurnerValley #BlackDiamond</p>	
March 15	<p>Let's Talk!</p> <p>With the intent to amalgamate, Black Diamond and Turner Valley, have begun the process of closely examining the impacts of potentially amalgamating the two Towns.</p> <p>Want to find out more about the process or ask questions?</p> <p>Register here for one of the two sessions: https://www.surveymonkey.com/r/N72L5Z2</p> <p>Questions? Email us here: amalgamation@town.blackdiamond.ab.ca amalgamation@turnervalley.ca</p> <p>#LetsTalkBDTV #TurnerValley #BlackDiamond</p>	
March 19	<p>DRAFT IG and FB Post:</p> <p>Black Diamond Mayor, Ruth Goodwin and Turner Valley Mayor, Barry Crane, are pleased to invite you to the Amalgamation Process kick-off event. It's your opportunity to ask questions and be heard! Click on the video link below to find out more information on how to sign-up and participate in the online meeting: https://we.tl/t-4qyDn0TL7m</p> <p>DRAFT Twitter Post:</p> <p>Mayors, Ruth Goodwin and Barry Crane, invite you to the Amalgamation Process kick-off. It's your opportunity to ask questions and be heard! Click on the video link below to find out more information on how to sign-up and participate in the online meeting: https://we.tl/t-4qyDn0TL7m</p>	

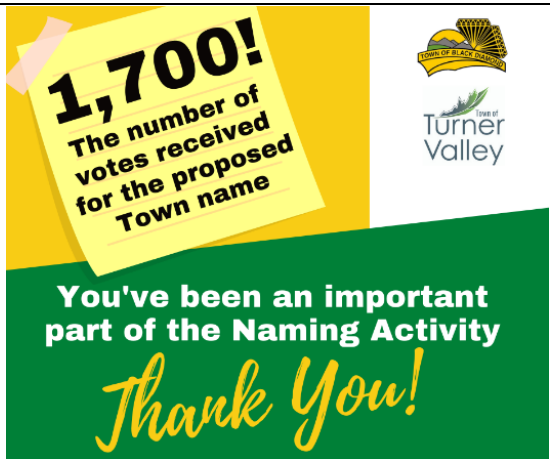
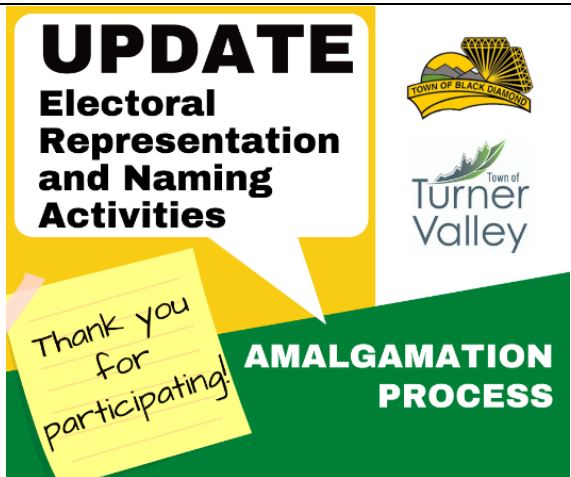
	#LetsTalkBDTV #TurnerValley #BlackDiamond	
April 5	<p>Thank you for participating in our Amalgamation Engagement Kick-off Events – it was nice to connect with members of both communities.</p> <p>If you were unable to attend, you can view a copy of the online presentation here: https://turnervalley.ca/proposed-amalgamation-updates/</p> <p>#LetsTalkBDTV #TurnerValley #BlackDiamond</p>	 <p>If you were unable to attend, click on the link in the post content to view a copy of the presentation</p>
April 6 or 7	<p>During our recent Amalgamation Engagement Kick-off Events, we asked participants to provide their thoughts by answering three amalgamation related questions.</p> <p>If you haven't had the opportunity to participate, the questions will remain open to complete until April 14, 2021.</p> <p>Answer our questions here https://www.surveymonkey.com/r/7N9HM8F</p> <p>#LetsTalkBDTV #TurnerValley #BlackDiamond</p>	 <p>A link to the questions is located in the post. Questions will remain open to complete until April 14, 2021</p>
May 13	<p>UPCOMING ENGAGEMENT ACTIVITIES:</p> <p>We are continuing to seek feedback from our community on amalgamation activities. Upcoming engagement events include:</p> <ol style="list-style-type: none"> 1. Electoral Wards Event 2. Municipal Naming Event <p>Stay tuned for more details on how you can participate. Engagement events will also be posted on our Town websites: www.turnervalley.ca www.town.blackdiamond.ab.ca</p> <p>Questions? Email us here: amalgamation@town.blackdiamond.ab.ca amalgamation@turnervalley.ca</p>	


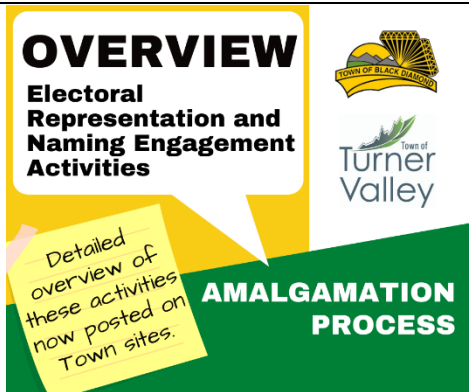
	#LetsTalkBDTV #TurnerValley #BlackDiamond	
The week of April 19	<p>THANK YOU to those who attended the recent online events and participated in answering our online amalgamation questions.</p> <p>What we're working towards now:</p> <ul style="list-style-type: none"> Updated 'Frequently Asked Questions' (FAQs) section, with questions we've received to date, will be posted on the Town's Amalgamation pages. "What We Heard" Report back to the communities and planning our next steps. <p>Stay tuned for more information on this coming soon!</p> <p>Questions? Email us here:</p> <p>amalgamation@town.blackdiamond.ab.ca amalgamation@turnervalley.ca</p> <p>#LetsTalkBDTV #TurnerValley #BlackDiamond</p>	
May 10	<p>Amalgamation Update</p> <p>We've been working hard behind the scenes to complete a What We Heard Report (WWHR). We've gathered all amalgamation related input (submitted questions, public event, and associated survey information) and saved it as one detailed report now available on the Town websites.</p> <p>FAQs</p> <p>We've also completed a set of Frequently Asked Questions based on what we've heard from the communities.</p> <p>To review the FAQs and the WWHR go to: www.turnervalley.ca www.town.blackdiamond.ab.ca</p> <p>As always, if you have any questions, email us here:</p> <p>amalgamation@town.blackdiamond.ab.ca amalgamation@turnervalley.ca</p> <p>#LetsTalkBDTV #TurnerValley #BlackDiamond</p>	
	NAMING Activity Post	

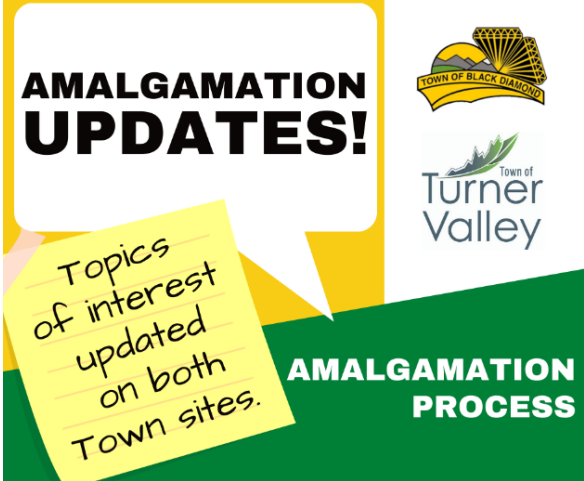
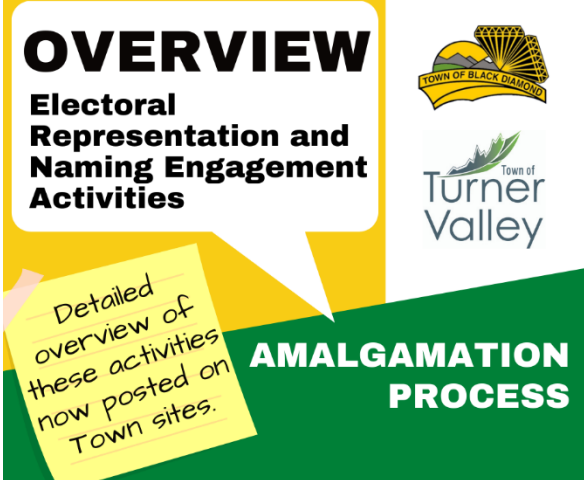
May 17	<p>NAMING ACTIVITY!</p> <p>Black Diamond and Turner Valley Councils are requesting name ideas from YOU for the potential amalgamated municipality.</p> <p>Names should be forwarded as a written submission, but can be supported by a drawing, story, photo, or any medium that communicates why the name is important to you. But please make sure to include an actual name with any graphic!</p> <p>Ideas will be accepted until June 6, 2021. Submit yours here: amalgamation@town.blackdiamond.ab.ca amalgamation@turnervalley.ca</p> <p>More information on the Naming Activity can be found here: Black Diamond https://www.town.blackdiamond.ab.ca/.../Amalgamation... Turner Valley https://bit.ly/3fwM3l1 #LetsTalkBDTV #TurnerValley #BlackDiamond</p>	
	WARD Activity Post	
May 17	<p>If the amalgamation is approved, what format should be used to elect a 2022 council for the new municipality?</p> <p>The Towns want your input on the two choices:</p> <ol style="list-style-type: none"> 1. 'At-large' system of voting – is the same system that's always been used. 2. 'Ward' system of voting - is establishing ward boundaries by dividing the amalgamated community into relatively equal areas based on population. <p>Your feedback will inform current decisions and provide insight into long-term community expectations.</p> <p>Participation is open until May 31, 2021 at 4:00 p.m.</p> <p>For more information and to have your say on the election format, go here:</p> <p>Black Diamond https://www.town.blackdiamond.ab.ca/.../Amalgamation... Turner Valley</p>	


	<p>https://bit.ly/3fwM3l1</p> <p>Questions? Email us here: amalgamation@town.blackdiamond.ab.ca amalgamation@turnervalley.ca</p> <p>#LetsTalkBDTV #TurnerValley #BlackDiamond</p>	
	<p>NAMING ACTIVITY!</p> <p>We're requesting name ideas from YOU for the potential amalgamated municipality.</p> <p>Ideas will be accepted until June 6, 2021. Submit yours here: amalgamation@town.blackdiamond.ab.ca amalgamation@turnervalley.ca</p> <p>Names should be forwarded as a written submission, but can be supported by a drawing, story, photo, or any medium that communicates why the name is important to you. But please make sure to include an actual name with any graphic!</p> <p>Ideas will be accepted until June 6, 2021. Submit yours here: amalgamation@town.blackdiamond.ab.ca amalgamation@turnervalley.ca</p> <p>More information on the Naming Activity can be found here: Black Diamond https://www.town.blackdiamond.ab.ca/.../Amalgamation... Turner Valley https://bit.ly/3fwM3l1 #LetsTalkBDTV #TurnerValley #BlackDiamond</p>	

<p>Post on Friday, June 11</p>	<p>We're happy to report we received over 200 entries, with 65 unique name ideas for the proposed amalgamated Town – THANK YOU!</p> <p>Mountain Valley, Diamond Falls, Friendship Valley, and Herronville, were just a few of the unique names sent in. However, there were three that stood out as front-runners.</p> <p>On Monday we'll announce the three most frequently submitted names and how you can vote for your favourite – check back then!</p> <p>Questions? Email us here: amalgamation@town.blackdiamond.ab.ca amalgamation@turnervalley.ca</p> <p>More information on the proposed amalgamation can be found here:</p> <p>Black Diamond https://www.town.blackdiamond.ab.ca/.../Proposed... Turner Valley https://buff.ly/3eZ1qsb</p> <p>#LetsTalkBDTV #TurnerValley #BlackDiamond</p>	
<p>Post on Monday, June 14 when the survey opens</p>	<p>We asked, you answered!</p> <p>Thank you, Black Diamond and Turner Valley for all your creative name ideas for the proposed amalgamated Town.</p> <p>The Naming Activity is now closed and from the submissions, the Towns have identified the most frequent entries for you to vote on. We won't keep you in suspense any longer, click below to find out the top names, AND TO VOTE!</p> <p>https://www.surveymonkey.com/r/NPCTXRC</p> <p>Voting starts today and closes on June 20.</p> <p>Questions? Email us here: amalgamation@town.blackdiamond.ab.ca amalgamation@turnervalley.ca</p> <p>More information on the proposed amalgamation can be found here:</p> <p>Black Diamond https://www.town.blackdiamond.ab.ca/.../Amalgamation... Turner Valley</p>	

	https://buff.ly/3eZ1qsb #LetsTalkBDTV #TurnerValley #BlackDiamond	
June 22	<p>We're happy to report during the Naming Activity, we received 1,700 votes during the for the top three proposed names:</p> <ul style="list-style-type: none"> • Sheep River • Black Valley • Diamond Valley <p>The results of the vote will be reviewed by the Joint Friendship Agreement Committee (JFAC) with the top name being announced shortly.</p> <p>Thank you for having your say! Your participation and engagement have been an important part of this activity.</p> <p>More information on the proposed amalgamation can be found here:</p> <p>Black Diamond https://www.town.blackdiamond.ab.ca/.../Proposed... Turner Valley https://buff.ly/3eZ1qsb</p> <p>#LetsTalkBDTV #TurnerValley #BlackDiamond</p>	
June 25	<p>Electoral Representation and Naming Engagement Activities: UPDATE The Joint Friendship Agreement Committee (JFAC), reviewed community feedback on the Electoral Representation and Naming Activities.</p> <p>Based on the majority vote, the following electoral representation system, and Town name is recommended by the JFAC:</p> <ol style="list-style-type: none"> 1. 'At Large' voting system 2. Town of Diamond Valley <p>Participation and engagement have been an important part of these recommendations, and we thank the communities for your feedback and support.</p> <p>Detailed results from the activities will be published in a What We Heard Report after the next public meeting in late July.</p> <p>More information on the proposed amalgamation can be found here:</p> <p>Black Diamond</p>	

	<p>https://www.town.blackdiamond.ab.ca/.../Proposed... Turner Valley https://bit.ly/3dgihpb</p> <p>#LetsTalkBDTV #TurnerValley #BlackDiamond</p>	
July 7	<p>Black Diamond and Turner Valley have completed the exploration of the potential amalgamation impacts between the two Towns.</p> <p>A Report Back consisting of an online public meeting has been scheduled to learn more about the outcomes of the amalgamation process and provide an opportunity to ask related questions.</p> <p>Register here for one of the two online public meetings:</p> <p>https://www.surveymonkey.com/r/6QJCJH8</p> <p>Can't attend one of the meeting times? A recording will be posted on both Town websites.</p> <p>The final decision to amalgamate will be made by each Town Council in September 2021. Thank you to everyone for participating in this process.</p> <p>More information can be found here:</p> <p>Black Diamond https://buff.ly/3eZ1qsb Turner Valley https://buff.ly/3cMQ9tP</p> <p>#LetsTalkBDTV #TurnerValley #BlackDiamond</p>	
July 7	<p>You Asked – We Answered! Updates to topics of interest related to the potential amalgamation are now posted on the Town sites:</p> <ol style="list-style-type: none"> 1. Financial report 2. Updated PIP: Includes all negotiation outcomes 3. Negotiation report to MA: All topics are complete 4. Updated FAQ 5. Engagement results: Detailed overview 	

	<p>6. Upcoming public meeting highlights</p> <p>All updates can be found here:</p> <p>Black Diamond https://buff.ly/3cMQ9tP</p> <p>Turner Valley https://buff.ly/3eZ1qsb</p> <p>#LetsTalkBDTV #TurnerValley #BlackDiamond</p>	
	<p>Amalgamation Updates!</p> <p>Topics of interest related to the potential amalgamation are now posted on both Town sites.</p> <ol style="list-style-type: none"> 1. Financial report 2. Updated Public Information Paper: Includes all negotiation outcomes 3. Updated FAQ 4. Engagement results: Detailed overview 5. Upcoming public meeting: Details <p>All updates can be found here:</p> <p>Black Diamond https://www.town.blackdiamond.ab.ca/.../Proposed...</p> <p>Turner Valley https://turnervalley.ca/proposed-amalgamation-updates/</p> <p>#LetsTalkBDTV #TurnerValley #BlackDiamond</p>	 <p>AMALGAMATION UPDATES!</p> <p>Topics of interest updated on both Town sites.</p> <p>AMALGAMATION PROCESS</p> <p>Logos for Town of Black Diamond and Town of Turner Valley.</p>
	<p>Earlier this spring, we asked Black Diamond and Turner Valley residents to participate in two amalgamation engagement activities:</p> <ol style="list-style-type: none"> 1. Municipality Naming 2. Electoral Representation <p>Detailed results are now posted on Town sites:</p> <p>Black Diamond https://buff.ly/3cMQ9tP</p> <p>Turner Valley https://buff.ly/3eZ1qsb</p> <p>#LetsTalkBDTV #TurnerValley #BlackDiamond</p>	 <p>OVERVIEW</p> <p>Electoral Representation and Naming Engagement Activities</p> <p>Detailed overview of these activities now posted on Town sites.</p> <p>AMALGAMATION PROCESS</p> <p>Logos for Town of Black Diamond and Town of Turner Valley.</p>

<p>July 26</p>	<p>Thank you for participating in our Amalgamation Report Back Sessions. The sessions provided the Towns with an opportunity to learn more about the outcomes of the amalgamation process and to ask questions.</p> <p>If you were unable to attend a session, you can review here: Morning Session Evening Session</p> <p>Please submit any additional amalgamated related questions or comments on, or before Friday, August 6, 2021:</p> <p>amalgamation@town.blackdiamond.ab.ca amalgamation@turnervalley.ca</p> <p>#LetsTalkBDTV #TurnerValley #BlackDiamond</p>	 <p>Thank You!</p> <p>FOR YOUR PARTICIPATION IN THE AMALGAMATION REPORT BACK SESSIONS ON JULY 22</p> <p>Recordings of the sessions are posted on the Black Diamond and Turner Valley websites.</p>
<p>July 30 and August 5</p>	<p>Black Diamond and Turner Valley have completed the exploration of the potential amalgamation between the two Towns. All information is now saved on the Town sites:</p> <p>Black Diamond https://buff.ly/3cMQ9tP</p> <p>Turner Valley https://buff.ly/3eZ1qsb</p> <p>If you have any additional amalgamated related questions or comments please submit them on, or before Friday, August 6, 2021:</p> <p>amalgamation@town.blackdiamond.ab.ca amalgamation@turnervalley.ca</p> <p>#LetsTalkBDTV #TurnerValley #BlackDiamond</p>	 <p>QUESTIONS?</p> <p>Please submit any questions or comments by Aug. 6, 2021.</p> <p>AMALGAMATION PROCESS</p>

Public Amalgamation Meetings Coming Up for Black Diamond and Turner Valley

Category: [Local News](#)

Published: Thursday, 18 March 2021 12:25

Written by Harrison O'Nyons



Black Diamond Mayor Ruth Goodwin says these events are the first of many planned for the coming months.

A pair of public engagement events are taking place at the end of the month relating to the Black Diamond/Turner Valley amalgamation.

They're the first of many planned opportunities for people to ask questions and get involved with the process.

According to a release from the Town of Turner Valley, the "Public and Stakeholder engagement" phase of the negotiations is set to take place between February and June of this year.

The two upcoming events will allow those interested to ask questions relating to the process

Black Diamond Mayor Ruth Goodwin, Turner Valley Mayor Barry Crane, communications consultants, and the CAOs of the respective towns will be present.

Goodwin says it'll also feature some background information for those who aren't fully caught up.

"It's really important that, at this beginning of this event, we explain what the process is and what it looks like over the past year since the decision was made in June of 2020."

With that said, she says she'd like to see people coming into the event with a good idea of the process and a few questions in mind.

"I hope more people [download or take the time to read that document](#). That provides some history and some background, some reasoning behind where we are today and why we have felt it's so important at this time to engage in this process and to start the negotiation for amalgamation."

She says they're planning for more of these events in the coming months.

"We will also be holding, later on into the Spring and early Summer, activities that our residents and stakeholders can participate in, that will have an impact on the outcomes like the naming of the community and whether or not we are looking at members at large or a ward system for our electoral wards."

The meetings are being held on Tuesday, March 30th from 6:30 p.m.-7:30 p.m., and on April 1st from 10:30 am-11:30 am.

Those wishing to attend are asked to [register ahead of time](#).

Questions can be sent to amalgamation@town.blackdiamond.ab.ca or amalgamation@turnervalley.ca, and Goodwin says you're welcome to forward any questions or concerns their way even outside the context of these events.

Send us your news tips, story ideas and comments at news@highriveronline.com

Towns begin public consultation on amalgamation

Mar 31, 2021 4:21 PM By: Okotoks Today Staff



1 / 2 Turner Valley Mayor Barry Crane and Black Diamond Mayor Ruth Goodwin will be part of public amalgamation discussions this week. | Brent Calver/Western Wheel

Black Diamond and Turner Valley are joining forces to host their second night of its initial online open houses concerning amalgamation this week.

The opening online public house was March 30, the second is set for April 1 from 10:30 a.m. to 11:30 a.m.

The initial meetings will outline the amalgamation process and timelines, discuss process related questions, and collect feedback on the topics community members want further clarification on.

"We value and respect the views of our community and encourage all residents to visit our websites for more information and to provide feedback on the amalgamation process," said Turner Valley Mayor Barry Crane.

The timelines for the proposed amalgamation include public and stakeholder engagement from February to June.

Collecting information about the potential amalgamation has been an ongoing process.

From September 2020 to August 2021, the Towns will collect all related amalgamation information and data for consideration. Negotiation of the mandatory and transitional matters over-viewed in the Municipal Government Act.

Additional public activities will be held in the spring and early summer of 2021 to report back on the amalgamation process. Announcements will be made when the event dates are confirmed.

“The questions and feedback we receive through our communication channels are extremely important to us and the input we receive will be considered by both councils before making a final decision,” said Black Diamond Mayor Ruth Goodwin.

If the Towns wish to proceed with the amalgamation process, a report and application will be sent to the Minister of Municipal Affairs.

Anyone wanting to participate in these events is encouraged to register at <https://www.surveymonkey.com/r/N72L5Z2>

To submit questions by email go to

amalgamation@town.blackdiamond.ab.ca or; amalgamation@turnervalley.ca

Name sought in proposed Black Diamond-Turner Valley amalgamation

May 20, 2021 10:00 AM By: [Tammy Rollie](#)



The Towns of Black Diamond and Turner Valley are requesting public input on a name for the proposed amalgamated community. (Image by Brent Calver/OkotoksToday)

As amalgamation talks continue between Black Diamond and Turner Valley councillors and administrators, residents are being asked to brainstorm possible names.

The neighbouring Towns are seeking name suggestions for the proposed amalgamated municipality over the next two weeks. Suggestions can be supported with drawings, photographs, stories or any medium that communicates why they suggested the name.

"This is an opportunity for the public to help shape the future of our community," said Turner Valley Mayor Barry Crane. "We want everyone to contribute to the public engagement of naming the new

community, remembering that our history will not be lost, but will still be recognized as we move into the future.”

Black Diamond Mayor Ruth Goodwin said the name of the new proposed municipality is intrinsic to the community’s success in the eyes of those living and working within two towns’ boundaries.

“Our residents and business owners want to be able to relate to and identify with a name that best represents a sense of history, recognition and marketability,” she said.

Black Diamond and Turner Valley began negotiations in the amalgamation process after submitting a letter to then Minister of Municipal Affairs Tracy Allard last fall, informing her of their intent to formally enter into amalgamation negotiations.

Negotiations take place during the monthly Friendship Agreement Committee meetings the second Wednesday of each month at 6 p.m. Meetings are livestreamed on Turner Valley’s website.

Such items under discussion include whether or not to establish different tax rates for residents living in Black Diamond versus Turner Valley until both get on an even footing, how to handle the fact that Turner Valley uses local improvement levies (a special tax residents in certain areas who might benefit from improvements must pay) for some of its infrastructure requirements while Black Diamond does not, where the municipal office should be located, whether to have a ward electoral or general electoral system and the name of the new city or town.

If the Towns decide to proceed with the amalgamation process, a report and application for amalgamation will be sent to the Minister of Municipal Affairs in September.

Black Diamond and Turner Valley have explored amalgamation twice in the past 35 years. Most recently, in 2007, the idea was voted down in a plebiscite.

In 2012, the councils adopted a Friendship Agreement as a commitment between the Towns to collaborate toward shared services and improvement communication.

Four years later, the newly elected councils agreed to explore the potential of merging.

The Towns received a \$150,000 grant from the Alberta Community Partnership to hire a consultant to conduct a feasibility study on amalgamation, which was completed in 2017.

Updated information on decisions around the amalgamation negotiations is available at www.town.blackdiamond.ab.ca and www.turnervalley.ca

Suggested names for the proposed community of Black Diamond and Turner Valley must be submitted to amalgamation@town.blackdiamond.ab.ca or amalgamation@turnervalley.ca by June 6.

The public will have an opportunity to provide feedback on the short-listed names through an online feedback survey starting in mid-June.



***About the Author:* Tammy Rollie**

Tammy Rollie is an award-winning reporter at OkotoksToday.ca, the Western Wheel newspaper, 51 Degrees North Magazine and the Okotokian Magazine. For story tips contact trollie@okotoks.greatwest.ca

[Read more](#)

Calgary

What's in a name? As Alberta towns consider merger, residents mull what to call combined community

Turner Valley and Black Diamond are just three kilometres apart, so they're looking to pool resources

[Sarah Rieger](#) · CBC News · Posted: Jun 06, 2021 6:17 PM MT | Last Updated: June 6



The Alberta towns of Turner Valley and Black Diamond are just three kilometres apart — so they're considering amalgamation to pool their resources. But what to call the new combined community? (Helen Pike/CBC)

Two neighbouring Alberta towns are in the midst of negotiations to amalgamate — which means collecting suggestions on what to call the new combined community.


Turner Valley and Black Diamond are just three kilometres apart, each with a population of around 2,700 and their own history and identity.

This is the fifth time since 1988 the towns have explored amalgamation. The last vote, in 2007, saw the "no" side win by a narrow margin.

The towns share a water treatment plant and a sewage system, and in 2012 signed a "friendship agreement" that formalizes commitment to collaboration.


The towns are currently collecting public input, and if they choose to proceed will send a notification of their intention to amalgamate to the minister of municipal affairs in September, with an anticipated incorporation date of Jan. 1, 2023.

Among that public input is a [call for new name suggestions](#), which are being accepted until end of day Sunday.



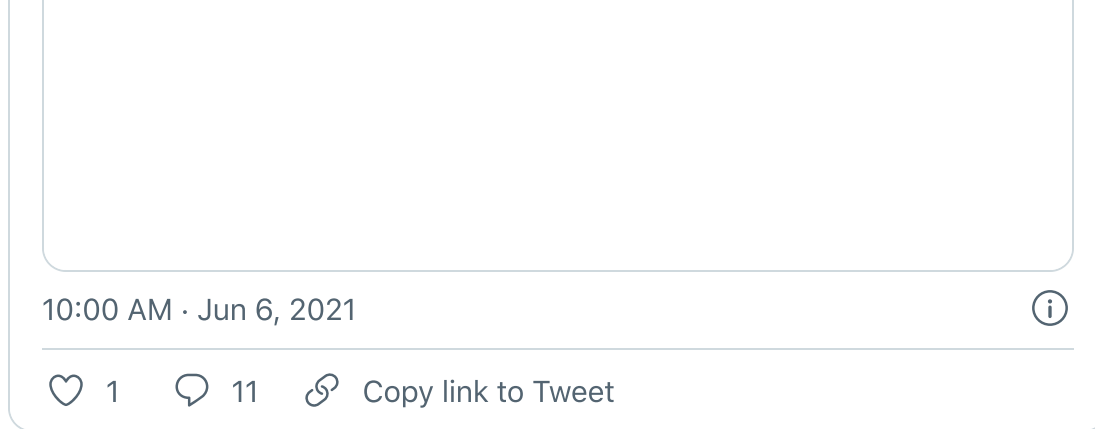
TownofTurnerValley

@TurnerValleyAB



TODAY IS THE LAST DAY TO SUBMIT YOUR NAME for the potential amalgamated municipality. Ideas will be accepted by email until June 6, 2021, at amalgamation@turnervalley.ca. PLEASE MAKE YOUR SUBMISSION USING THE EMAIL ADDRESS to ensure it is captured for consideration.

[#LetsTalkBDTV](#)



Black Diamond Mayor Ruth Goodwin said the call for names has generated a lot of discussion.

"It's intrinsic to the success in the eyes of many who live within its boundaries," Goodwin said.

"Our residents and business owners want to be able to relate and identify with a name that that best represents a sense of history, recognition, marketability and cultural significance. So this is an important aspect of the amalgamation application process and our public engagement."

Bridget Lacey grew up in Turner Valley, and is in favour of joining the towns.

"I'm in favour of the name Diamond Valley personally, I think it's a nice sounding name and includes the two towns in part," she said.

But Cheryl Graeyson is less sure.

"I don't believe the two towns being amalgamated is going to make any difference as far as what our residents ourselves have to pay in property taxes and recycling — I just don't see it happening," she said.

- **Black Diamond, Turner Valley consider becoming single municipality**

If the towns combine, some are open to entirely new names.

"I also think that maybe something that is local to both communities that is entirely different, I don't know," said Lynne Steele. "I think we're close enough together it should be all one community."

Goodwin said there are several potential benefits to amalgamation, like sharing the cost of policing or waste and recycling — a savings that will be passed on to residents.

The short-listed names will be made public in mid-June.



©2021 CBC/Radio-Canada. All rights reserved.

Visitez Radio-Canada.ca

This article was subsequently published on [YYC Times](#) (link no longer available), [CBC Radio Canada](#), and [Knowledia.com](#)

Meetings to answer questions about Black Diamond/Turner Valley amalgamation

Jul 21, 2021 8:00 AM By: [Tammy Rollie](#)



The public is invited to attend one of two virtual public meetings on July 22 regarding potential amalgamation. (Imagine by Brent Calver/OWW)

Questions surrounding what amalgamation could look like for Black Diamond and Turner Valley will soon be answered.

The Towns are hosting an online public meeting July 22 for an hour each at 10:30 a.m. and 6:30 p.m. to present information regarding the Towns' negotiations and financial breakdown of how amalgamation could impact the communities, says Turner Valley Mayor Barry Crane.

"I will do the background and history and how we got to where we are and Ruth (Goodwin, Black Diamond mayor) will handle the reports section," said Crane. "Members of the finance committee will be available to answer questions for both Towns if there's specific questions for a particular town that can be answered by their councillors or administration."

Crane said councillors and senior administrators in both communities will attend the virtual meetings.

"These towns have been great partners since their formation and have been talking about amalgamation for over 40 years," said Crane. "It's great to finally have the answers."

The neighbouring municipalities explored amalgamation twice in the past 35 years, but the idea was voted down in a plebiscite both times - most recently in 2007.

The Towns submitted a letter to the Minister of Municipal Affairs last fall about their intention to formally enter into amalgamation negotiations. If the Towns decide to proceed, a report and application for amalgamation will be submitted in September.

As the information is provided in a slide show on July 22, attendees can ask questions using the chat window, Crane said.

"All questions will be answered and if they can't be answered right there and then they will be followed up and answered," he said. "The town administration will find a factual answer and sent it to them and it will be added to the Town website for questions asked. No question gets unanswered and no question gets left behind. All of that information will be sent to municipal affairs as part of the public engagement process."

Crane said he hopes to see more than 100 people attend each session, adding that amalgamation has been a hot topic in recent years.

"For all the people that I talk to, they say it should have been done years ago and are thankful we got to this point and are really excited to see the final answers financially," he said. "This is something they're passionate about."

Crane said both meetings will cover the same information and asks the public to attend only one to ensure there's ample room for everyone wanting to attend. The meetings will be recorded and posted on both Town websites.

To register click [here](#).



About the Author: Tammy Rollie

Tammy Rollie is an award-winning reporter at OkotoksToday.ca, the Western Wheel newspaper, 51 Degrees North Magazine and the Okotokian Magazine. For story tips contact trollie@okotoks.greatwest.ca

Calgary

Alberta could soon be home to Diamond Valley, if 2 towns become 1

Turner Valley and Black Diamond have long considered amalgamating, but the process is now well underway

CBC News · Posted: Jul 22, 2021 3:11 PM MT | Last Updated: July 22



The Alberta towns of Turner Valley and Black Diamond could merge to become Diamond Valley. (Helen Pike/CBC)

Residents of neighbouring towns Black Diamond and Turner Valley in southern Alberta say if they amalgamate, the name of the new town should be Diamond Valley.

That's from an online survey conducted earlier this year.

The results were presented Thursday, along with a report that outlined some of the changes that would come with an amalgamated community, including how councillors would be elected for the new town.

This is the fifth time since 1988 that the towns — separated by a three-kilometre stretch of Highway 22 — have explored amalgamation. The last vote, in 2007, saw the "no" side win by a narrow margin.

The towns share a water treatment plant and a sewage system, and in 2012 signed a "friendship agreement" that formalizes commitment to collaboration.

Officials said they would expect cost savings of about \$370,000 per year through a reduction in staff and redundancies, plus a one-time cost of \$1.6 million.

However, Turner Valley Coun. Cindy Holladay said it's hard to know exactly how much would be saved and passed on to taxpayers.

- [**What's in a name? As Alberta towns consider merger, residents mull what to call combined community**](#)

"We can't guarantee the decisions of future councils," she said.

"There's an election this year, there will be another one should the amalgamation go through in 2022, and those councils might decide that even though there's efficiencies to be found, they might want to increase the services that the newly amalgamated town provides."

Each town council is expected to vote on amalgamation in September.

If the towns decide to proceed, they would need to apply to the minister of municipal affairs for approval.

After that, residents would vote for a new council in November 2022.

With files from Colleen Underwood

CBC  Radio-Canada

©2021 CBC/Radio-Canada. All rights reserved.

Visitez Radio-Canada.ca

APPENDIX 6c

Risks and Mitigations

An email provided by Councillor Ted Bain

Note: for the purpose of this report, names and email addresses of recipients are shown as xxxxx.

Email From: Councillor Ted Bain
To: xxxxx
Date: May 10, 2021 at 11:58:55 AM MDT
Subject: Risks and mitigations as requested

Most amalgamations have benefits for all participants. I believe that most of the time the benefits outweigh the disadvantages. However, far too often many of the promised or anticipated benefits fail to materialize. Dissatisfaction resulting in de-amalgamation is rare, but it does happen, with the attendant human cost. Discontent over real or perceived slights can set one faction against another, poisoning a cooperative atmosphere for many years. Careful planning and being fully aware of pitfalls others have faced will go a long way towards a successful result. I have been asked to describe risks and mitigations specific to our situation. For the purposes of this discussion, a 'risk' is the possibility of anticipated or promised results not occurring, or a possible monetary or non-monetary cost that has not been identified.

Every amalgamation is unique. However, risks identified in multiple other amalgamations could apply and can often be predicted. Regarding a fairly common reaction after amalgamation, one author wrote, “Why do predictable results surprise anyone?”

Many of the potential risks have no mitigation available, or mitigation done elsewhere will not apply here. Often the only mitigation would be identifying a possible risk, and informing the public. This will assist them in any decisions they make and lower unrealistic expectations. The impact of most of these events, if they occur, will not be fully apparent until after amalgamation occurs. By then it will be too late to change course, leaving issues for the new Council.

The risks generally fall into two major areas. The first, expectation of financial benefits, was identified in the 2017 Amalgamation study and in the vast majority of studies that I read. People expect that we have a handle on costs and know where savings can and will be realized. Our letter to the Minister initiating the process states that there is a financial substantiation to amalgamation. The kickoff events, the 3

question survey, and web questions also tell us that people want to know that we have carefully considered costs and savings. Many seem to expect major savings.

The second major area of risk is long lasting public discontent. There will always be some people unhappy with the fact that they are now amalgamated, the way that it was done, or that promised benefits didn't happen. Hopefully we can minimize this.

1. Efficiencies of scale. The risk is that sometimes efficiencies of scale do not exist. It is generally assumed that the more of something produced or purchased, the cheaper each unit is. This is often, but not always, the case. Efficiencies are highly dependent on what is being produced or purchased. Is it material or labour intensive? What are local conditions including availability of labour, raw materials and equipment? There are many other factors. We have stated that efficiency of scale is a benefit to amalgamation, so we should give the public specifics, rather than sweeping generalities. If we haven't identified what we expect to see efficiency of scale in, we are guessing, and promised efficiencies may or may not occur. Mitigation of risk here has been accomplished if we have identified where efficiencies exist.
2. More effective and efficient delivery of Municipal Services. The risk is that this stated objective will not occur. "Aside from an increase in costs, research has also found that many amalgamations have not led to municipal service efficiencies". 3 studies cited. (Thinking Regionally: How to Improve Service Delivery in Canada's Cities. C.D. Howe Institute in Oct 2016). This study primarily deals with larger populations, but some conclusions apply to us. Better Services may or may not happen. The only mitigation would be to do a service review and/or study what services would be delivered more efficiently after amalgamation and compare this with inter-municipal cooperation. If we do not do this, we are guessing that there will be an improvement when there may be increased costs. We are leaving any study to a new Council.
3. Grants not forthcoming. Although there is no firm estimate of the cost, the price tag for amalgamation is roughly \$1,000,000. The only money that has been committed to us is about \$100,000, leaving us to find approximately \$900,000. Fortunately this cost will be spread over several years. We are telling people that under rules that have been in place in the past we should get additional funding, but there is no guarantee. The only way to mitigate the risk of lack of grants is to find additional funding – unlikely in the current economy, or get a commitment in writing. Failure to get funding for the transition will be a huge hit to taxpayers.
4. Cost of Severance. The severity of this risk has not been calculated. Since we have no idea who will want, or demand, severance if their job changes

significantly, the scale of this risk is unknown. Given the economic climate, it is unlikely that all staff will want to be bought out. However, if a significant number do want severance, the immediate cost could be several hundred thousand dollars. Many amalgamating towns find that in addition to the cost, a great deal of local knowledge is lost. Sometimes all senior staff in one or more departments gladly accept several month's or a year's salary for no work, and leave. If more staff than anticipated leave, there is a direct cost to hire and train new staff, and an indirect cost as new staff gain local knowledge and experience. A savvy staff member could accept a buyout and then, as probably the best qualified candidate, apply for the vacant job. This additional cost has not been identified to JFAC or the public. Mitigation of cost may not be possible. Mitigation of public dissatisfaction would be to identify that we are aware there will be a cost.

5. Wage parity. The risk is that there will be significant wage increases. The two towns have different pay scales for the same job. In other amalgamations, when the two work forces are combined, wage scales are usually matched, and in every case I read, wages were levelled up. The cost of doing this, which is a permanent cost increase, has not been calculated. The only mitigation to the cost comes with risk. We could refuse to match salaries, which will certainly result in lower morale and efficiency, and could also trigger a Human Rights complaint if the personal characteristics of the higher and lower paid worker differ. Mitigation can also be accomplished by recognizing and accounting for the cost. This additional cost to match salaries can be calculated, but it has not been identified to JFAC or the public.
6. Staff consolidation. Risk is moving too quickly. Some municipalities discover that they have been over zealous in trimming staff to get immediate savings. This occasionally leaves departments that do not function well, and sometimes a department is totally dysfunctional. In addition to disruption in operations, there will be a cost to hire/train staff to rebuild a department. We are mitigating the risk of under staffing by keeping as many people as possible during the first year or so after amalgamation. We have necessarily left this consolidation issue for a new council to deal with. To avoid public dissatisfaction, we should clearly let the public know that there will be no quick savings.
7. More, or higher paid staff required. Risk is the unidentified requirement for extra or higher paid staff that eliminates any savings. Without determining a potential organization, service levels, or workloads, we are unable to discover where additional staff may be needed. Many towns with a population 5000 - 6500, have a need for an assistant CAO. Mayor and Council of a larger town are commonly paid more than in a smaller town. The same normally goes for

the CAO and many department heads. We can't realistically expect to pay someone who supervises 8 or 10 people on both sides of the river the same as someone who supervises 4 or 5 on only one side. Larger departments and greater responsibility may require staff with higher certification or training that we haven't identified. Rather than researching an average administration salary/council pay in towns of 5000 – 6000 and giving people information, we are simply saying it's up to a future council. These additional costs are unavoidable so there is no way to mitigate the expense.

8. Duplication of Equipment/facilities. We have indicated that there will be a savings because major equipment/facilities will not have to be purchased by both towns. There has been no study to determine if this is true. We have told the people that ALL facilities will be needed and remain open in the short term. If duplication can be avoided, there has been no study to determine increased maintenance costs, staff time, and decreased life cycle of items that will now be used more. The risk is that there will be no promised savings, and potentially increased costs. The only way to mitigate the risk is to identify what will be excess and determine if there will actually be any savings. We are leaving this problem for a new council.
9. Increased taxes. Risk is a large increase. Rapid increases of over 50% are rare, but do occur. Smaller percentage increases are common, although blaming amalgamation for all of an increase would not usually be accurate. The money to amalgamate has to come from somewhere, and there are only four sources – Provincial grants, reserves replenished by increased taxes and/or decreased services, operational efficiencies, or borrowing money. For immediate costs, I believe that uncommitted reserves or a debenture are the only sources. Both will have to be repaid from the tax base. Mitigation of unavoidable costs is, by definition, not possible. Since we don't know what costs will be, and are saying that future taxes are not our responsibility, we can't prepare the public if a tax increase is required. They are currently expecting a decrease. Explaining increases or taking credit for decreases will fall to a new Council.
10. Fewer voices advocating for the area. The risk is that although there will be 7 elected representatives in a larger town, the extra impact that 7 will have may actually be less than 14 advocating for the area. Some area boards and committees now have a representative from each town, giving two voices and votes on matters. An amalgamated town will have 1 voice and vote. I'm told that there are currently no boards or committees that both towns have been excluded from due to size that a larger town would have a representative on, and a vote. The Reeve of Foothills County recently stated that requests from three Counties for amendments to an area plan have been ignored by the larger

towns/cities on the CMRB. If 3 counties representing about 77,000 people can be casually ignored, then a town of under 6,000 will not have any increased sway in the area compared to two smaller towns. The only mitigation to this decrease in political power would be to maintain two towns, so people should be told to expect less say in regional matters.

11. Public dissatisfaction. Some amalgamations fail to achieve optimum satisfaction if a large portion of the public is not in favour of amalgamation. In an e-mail to me, the former CAO of an amalgamated town wrote "even after several decades one of the towns was content and the other, the smaller of the original two, discontented". A majority of the population of the smaller town did not want to amalgamate, but their concerns carried little weight. Our three question survey has shown that there are people in the towns who are very unhappy that we have not asked a straight forward question – Do you want to amalgamate? We claim to be ready to take public opinion into consideration, but won't ask the most important question. The only way to mitigate (but not eliminate) the risk of discontent, whether we amalgamate or not, is to ask the question, hope the public falls clearly on the yes or no side, and honour the result. We agreed that a plebiscite would not be held, however if what the public wants is in any way a concern, we should be clearly finding out if they want to amalgamate.
12. Over emphasis of benefits and under emphasis of risks/downsides. Several members of the public commented that we were stating a lot of possible benefits and very few real or possible disadvantages. To mitigate public discontent and lead the public to more realistic expectations, we should balance advantages and disadvantages.
13. Cost savings. We have highlighted real and potential savings and failed to inform the public that initially, and possibly long term, there will be extra costs that may well offset any savings. I have noticed that both Mayors have stopped telling the public that there will be a cost benefit – emphasizing the other possible benefits. As one author put it, "My research and observations have convinced me that amalgamations almost never save money – for unavoidable reasons." To mitigate public anger, we should clearly tell the public that there will very likely be no immediate overall cost or tax savings. It is commonly 3 – 5 years (if ever) before any overall savings are realized.
14. Ongoing engagement with citizens. The risk to this stated objective is that there will be less public engagement. Studies that have examined this often state that after amalgamation there are many of the following: less public participation in elections, less engagement between citizens and elected officials, lower citizen

satisfaction with elected officials, lower volunteer participation resulting in staff being hired to fill the gap, greater cost and less interest in running for office, and increased influence of special interest groups. I don't know what other towns have attempted to mitigate this effect. These effects are so widespread that there may be no feasible way to mitigate.

15. Streamlined decision making. The risk is that some decision making will be less streamlined. “It must be appreciated, then, that amalgamation doesn't eliminate differences and clashes; it brings them inside a single council chamber.” (Local Government in Canada, R and S Tindal, a textbook used at many Canadian universities for over 40 years). Currently, differing priorities on each side of the river can be sorted out there. An amalgamated council would have streamlined decision making for matters that affect each side of the river equally, but would then have less streamlined decisions on matters where East and West priorities differ. Joining Foothills County would allow quicker regional decisions to be made, but then local differences would bog down. Amalgamation simply changes the level at which disagreements occur. In our case, we could try to mitigate by doing what many towns have unsuccessfully done – remind elected officials that they are supposed to represent everyone equally and strive to only have people elected who will honour that ideal.

It is impossible to determine which events will occur with our amalgamation. I'm sure there are other potential events I haven't identified. The best we can do is to look at what HAS happened in other amalgamations, realistically determine the possibility of something similar happening here, honour our commitment to transparency, and share these possible downsides with our public along with possible advantages.

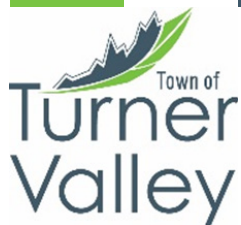
Sent by Black Diamond Councillor
Ted Bain

APPENDIX 7

Black Diamond and Turner Valley Amalgamation Feasibility Study



Black Diamond and Turner Valley: Amalgamation Feasibility Study



July 12 2017



The two Towns have discussed amalgamation dating back to 2007 and the idea was first explored as far back as 1986. Amalgamation is the process to restructure the Towns into one new municipality. This focuses on managing assets and services from one perspective, providing the greatest opportunity to achieve shared objectives. While there has not been any official changes to the municipalities, each new conversation has built on their collaborative efforts, resulting in the Friendship Agreement of 2012. The Towns look to build on the Friendship Agreement to create a framework for moving forward to strengthen their collaborative efforts rather than competing for resources and opportunities. As independent communities, Black Diamond and Turner Valley could continue to co-exist with a “business as usual” approach or they could reimagine ways to pool their resources and develop coordinated plans and strategies to deliver services. As a step toward a unified community, the Towns have developed a shared vision and set of principles and objectives to help guide decisions.

Shared Vision:

We align our strengths to serve a community that is bound together by a strong sense of belonging.

Guiding Principles:

- Balancing service levels with long term cost.
- Joint decision making that is effective and adaptive and based on honesty and integrity.
- Developing and implementing policies that are fact based, action focused, and achievable within a realistic and feasible timeframe.

Shared Objectives:

- Diversified and Resilient Economy: shared investment in strengthening the local economy.
- Integrated Policy Framework: aligning policies with shared growth objectives.
- Sustainable Service Delivery: more effective and efficient delivery of municipal services.
- Expanding Community Capacity: shared commitment to ongoing engagement with citizens.
- Responsive Local Governance: long-term and prioritized land and infrastructure planning.

COMMUNITY OBJECTIVES

The two Towns engaged with citizens to better understand their thoughts on the types of services that were being provided and their overall level of satisfaction. The overall feeling was a high level of satisfaction for the services that are being provided. When services were considered individually (e.g. garbage collection, snow removal, among others), evaluating both the importance of the services and the citizens’ level of satisfaction, respondents from both Towns had similar perspectives on what they felt was important and how satisfied they were, from both a positive and negative perspective.

ALTERNATIVE OPTIONS

The purpose of this project was to build from the 2012 Friendship Agreement, exploring these options:

1. **Status Quo:** continuing on the same course, finding ways to collaborate when it is convenient or in reaction to events that make sense to have the two Towns work together.
2. **Comprehensive Collaboration:** making thoughtful decisions to collaborate that are based on trying to achieve a shared vision.
3. **Amalgamation:** merging the two towns into a single municipality to collectively manage assets and resources in order to achieve shared objectives.

OPTION ANALYSIS

Deciding how to proceed was analysed around a number of different factors beyond financial benefits and costs. This included social and environmental considerations to evaluate the sustainable community development perspectives of each option. Status Quo, Comprehensive Collaboration, and Amalgamation were considered using the following indicators:

1. **Financial and Economic Considerations:** the economics of change were considered based on community, provincial, and service delivery objectives in order to implement a preferred option.
2. **Environmental Impacts:** policies and standards enforced by senior levels of government and municipalities impacts the health of the environment. Any change must consider this important issue as part of a future transition.
3. **Social Impacts:** the municipalities have indicated that responsible governance, engaged citizens, and sustainable service delivery, will be key factors in evaluating how the Towns move forward.
4. **Managing Risks:** we can never eliminate risk, but we can minimize it by managing it effectively. This includes understanding potential impacts and how likely they are. Managing risks requires strategies that include cost, to help determine whether the risks are worth mitigating or if they can be tolerated.

Each of the three options were screened through the individual indicators listed above. However, the decision on how to proceed is based on how all of the different indicators relate to each other. This evaluation outlined the following perspectives on the general opportunities and challenges associated with each of the alternative options:

1. **Status Quo:** maintaining the status quo challenges the ability to achieve the shared objectives. While the two Towns are collaborating as part of the Status Quo, maintaining the current approach will keep the focus on the individual communities rather than the shared vision.
2. **Comprehensive Collaboration:** reinforcing collaboration provides access to a bigger toolbox that helps achieve the shared objectives, provides more options for delivering services, and maintains local autonomy. Building a collaborative mindset helps the Towns work towards shared goals rather than reacting to changes independently.
3. **Amalgamation:** amalgamation provides the greatest opportunity to achieve the shared objectives. However, this represents a significant change from the current reality. Amalgamation can flow naturally from collaboration as the local mindsets change toward a more collective approach.

PRIORITIES MOVING FORWARD

Understanding that financial and human resources are limited, the key to success in moving forward is working together to evaluate and agree on priorities that benefit both communities. As the Towns grow and change, the priorities will also change. This requires continual engagement with citizens to understand what is important so the Towns can find ways to do things more effectively together.

THIS SECTION RESERVED TO COMMUNICATE HOW THE TWO COUNCILS WANT TO PROCEED – THE REPORT DOESN'T HAVE ANY DEFINITIVE CONCLUSION AS THERE IS NO ONE RIGHT ANSWER.

Table of Contents

1.0	INTRODUCTION	3
2.0	VISION AND GUIDING PRINCIPLES	3
3.0	COMMUNITY OBJECTIVES	5
3.1	Service Delivery	5
3.2	Community Capacity	9
3.3	Public Perspectives	10
4.0	ALTERNATIVE OPTIONS	11
4.1	Status Quo	12
4.1.1	Population Comparison	13
4.1.2	Revenue and Expenditures Comparison	14
4.1.3	Debt and Accumulated Surplus Comparison	17
4.1.4	Comparison of Tangible Capital Assets	17
4.2	Comprehensive Inter-Municipal Collaboration	18
4.3	Amalgamation	19
4.3.1	Comparative Community Analysis	19
4.4	Opportunities and Challenges with each Option	20
4.4.1	Status Quo	20
4.4.2	Comprehensive Inter-Municipal Collaboration	21
4.4.3	Amalgamation	21
5.0	BUSINESS CASE ANALYSIS	22
5.1	Financial and Economic Considerations	22
5.2	Environmental Impacts	23
5.3	Social Impacts	23
5.4	Managing Risks	24
5.5	Multiple Account Evaluation	25
5.5.1	Financial and Economic Considerations	25
5.5.2	Environmental Impacts	28
5.5.3	Social Impacts	29
5.5.4	Managing Risks	31
6.0	IMPLEMENTATION	32
6.1	Evaluate a Path Forward	32
6.2	Path to Amalgamation	36

6.2.1 Application requirements	36
6.2.2 Transition elements.....	37
6.2.3 Consultation elements	39
6.2.4 Key considerations	39
7.0 FUTURE STEPS	40
APPENDIX 1	41
APPENDIX 2	53
APPENDIX 3	56
APPENDIX 4	61

1.0 INTRODUCTION

The two Towns have been talking seriously about the prospects of amalgamation dating back to 2007 and the concept was initially explored as far back as 1986. While there has not been any official restructuring of the municipalities, each new conversation has resulted in the two communities building on their collaborative efforts, resulting in the Friendship Agreement of 2012. Recognizing that past efforts have not produced any tangible progress towards restructuring, the Towns are building on the Friendship Agreement to create a framework for moving forward with the steps necessary to create lasting prosperity.

Achieving sustained prosperity as a future outcome that the two communities can strive toward, requires incremental steps that will move them closer to their collective vision. Through this approach, each are able to build their collaborative efforts around efficient and coordinated planning, providing consistent levels of core municipal services, pursuing economies of scale in managing assets from a community rather than municipal perspective, and promoting the “Diamond Valley” region as a unified community to improve the attractiveness of the area to current and prospective citizens, businesses, and industries.

Black Diamond and Turner Valley are two strong communities that have a lot to offer each other. The notion of amalgamation as an outcome is about building something together that is stronger than the sum of all the individual parts, creating a path toward a stronger future for the citizens of both communities. The Towns have embarked on this process, recognizing that they can accomplish together what neither can alone as they strengthen their collaborative efforts rather than competing for resources and opportunities.

The benefits of amalgamation are often overemphasized as savings that arise from fewer of everything. A prevailing emphasis on efficiency and cost-savings in local government can shift the focus away from the impact of its work for citizens. The true benefits arise from a shared vision that enables the two municipalities to operate as a single community.

The primary objective of the Study is to examine the feasibility of amalgamation, through a critical analysis of the current reality and a series of strategic objectives to help evaluate decisions against a shared vision. The question becomes, how do we determine feasibility? Optimists will tell you that anything is feasible, while pessimists will always look for reasons to delay the decision. Rather than seek a truth that can never fully be verified, we have examined feasibility from the simple perspective of where you want to go.

2.0 VISION AND GUIDING PRINCIPLES

Black Diamond and Turner Valley share the same geography, demography, natural resources, and climate. They also share the same challenges, frustrations, and concerns for the future. Many already know that the Towns are great places to live, work, and/or raise a family. If it is to remain this way, then retaining and attracting people, jobs, and investment is increasingly important. Together, the two communities are stronger and can better achieve this vision.

As independent communities, Black Diamond and Turner Valley could continue to co-exist with a “business as usual” approach. However, the opportunity for building a diverse and integrated community is enhanced if the two Towns reimagine ways to pool their resources and develop coordinated plans and service delivery strategies. A united community with a single agenda will contribute toward a high quality of life for current and future generations.

The ability to establish a practical and achievable collaborative approach that meets the collective aspirations and objectives of the two communities is key to proactively rethinking the structure of the community. There is a danger of getting mired in the details when trying to develop a fact-based answer to every conceivable question. Yes, information is important, but the future is often more about vision and the human element than it is about analyzing today’s details.

Innovation occurs through strong leadership, exhibiting the courage to recombine existing elements in new ways. Local Government today, increasingly requires reimagining a collaborative approach, to achieve the following critical success factors in the community:

- Excellent quality of life
- Environmental stewardship
- A preferred place to live and visit for people in all stages of life (e.g. young families, young professionals, and senior citizens)
- Diverse and resilient economy (e.g. home based businesses, electronic and IT industry, and capitalizing on tourism opportunities)
- Fiscal stewardship
- Effective and integrated service delivery
- Transparency and effective community engagement
- Informed decision making
- Strong community with shared leadership and aspirations
- Adaptive and proactive planning and preparedness for growth

As a step toward a unified community, the Towns have articulated a clear vision and set of principles, to help guide the decision making process as each pursue incremental changes toward a collective future.

Shared Vision:

We align our strengths to serve a community that is bound together by a strong sense of belonging.

Guiding Principles:

1. Balancing service levels with long term cost.
2. Joint decision making that is effective and adaptive and based on honesty and integrity.
3. Developing and implementing policies that are fact based, action focused, and achievable within a realistic and feasible timeframe.

3.0 COMMUNITY OBJECTIVES

Financial challenges caused by decreased funding from higher levels of government, a constrained ability to generate revenue, increasing costs associated with aging infrastructure, and increased expectations from citizens on what constitutes an acceptable level of service are a major driving force behind considering any changes to municipal structures. Consequently, the question of how to do more with less has been a focus for municipalities for years, given the unprecedented responsibility of local governments for so many services and assets.

The other side of the equation asks how to accomplish all of this while maintaining public confidence and citizen satisfaction. This goes beyond meeting the needs of the municipal corporation and recognizes that the reason the municipality exists is to serve the citizens.

Any efforts toward achieving amalgamation, requires practical steps towards implementing incremental change. This is not predictive or a linear series of steps. With a focus on what can be done together, it is critical that this approach evolves as priorities change, specific challenges are addressed, and new ones emerge.

While this focuses on incremental change built around a mutual investment in the community, the iterative nature is built around aligning shared objectives and building the capacity to collaborate as a unified community.

Shared Objectives:

1. **Diversified and Resilient Economy:** shared investment in strengthening the local economy and creating an environment that supports the growth, expansion, and evolution of business opportunities.
2. **Integrated Policy Framework:** aligning the planning, policy, and regulatory frameworks with shared growth objectives and streamline coordinated decision making processes.
3. **Sustainable Service Delivery:** move toward more effective and efficient delivery of municipal services that integrate and streamline core services, reducing duplicative efforts.
4. **Expanding Community Capacity:** shared commitment for a continued investment in civic infrastructure and ongoing engagement with citizens to continue building the capacity of the public to participate in the community.
5. **Responsive Local Governance:** establish long-term and prioritized infrastructure planning in coordination with harmonized land use planning that strengthens and unifies the community voice in the pursuit of collective sustainable community development objectives.

3.1 Service Delivery

The social contract that we have all signed requires us to pay for the services that we receive, which are paid for through municipal taxes on property and utility rates, which charge fees directly on the services we use. Local governments today are providing services at a level beyond anything they have done

historically and the expectations among citizens continues to grow without the same level of expectations around increasing the amount of taxes and fees that they pay.

The primary role of municipalities is to deliver services within a geographically defined area. Municipal services are typically bound to a specific area based on the ability to extend water and wastewater networks, which typically differentiate urban from rural communities. However, as the number of services that local governments deliver continues to grow, specific boundaries are less relevant in determining what is considered local. For example, recreation facilities and programs, economic development, and health care represent services that are not geographically-bound and represent a very different perspective of local.

There are two major groupings of services:

1. **Internal services:** those that support Council, governance, and external programs.
2. **External services:** those that are delivered directly to the public.

The delivery of each of these service groupings requires planning, organizing, staffing, equipping, and funding, all of which needs to be brought together in the form of service profiles and operational plans. Reimagining how the two municipalities are structured, provides the opportunity to rethink service delivery and explore alternative operational plans that help improve efficiency and effectiveness in service delivery. While certain programs are apparent or obvious to consider for service delivery, it is important to consider the lead time necessary to develop an effective service delivery model. Evaluation of different options requires an agreed upon set of standards, all of which takes time and understanding of the different needs and expectations.

There are ever-increasing expectations for governments to make informed choices about the services they provide to their citizens. This is evident for municipalities whether facing times of positive economic growth or periods of fiscal constraint. Service delivery objectives focus on setting priorities and, where possible, reducing the cost of delivery while maintaining or improving services and service levels. It's all about making informed, strategic choices. In general terms, the service delivery objectives can be divided into two main groups:

1. **Focused on the Present:** address existing infrastructure needs.
2. **Focused on the Future:** build the necessary infrastructure to support future growth opportunities.

Figure 1 illustrates the significance of setting priorities and making decisions based on a sound understanding of what the community is trying to achieve. All municipalities need to renew their infrastructure and assets and growing municipalities need to add to them to meet the needs of their expanding population. Given the differences between addressing current infrastructure needs and investing in expansion to accommodate continual growth opportunities, the community can get lost in the following circular logic, which emphasizes the importance of strategic decision making:

1. We need to take care of our existing infrastructure and program needs to meet the current levels of service (for example, fixing roads and adding more seniors housing).

2. Residential taxes are high under our current conditions. We need to diversify our tax base by adding more businesses to increase our revenue.
3. We need to invest in our infrastructure to attract businesses to our community and create opportunities for growth (for example, more properties and lands for businesses, telecommunication infrastructure, and more diverse housing types).
4. We need to communicate and demonstrate accountability of decisions to the public, ensuring the community has the information necessary to understand how their tax dollars are being utilized.

Figure 1: Service Delivery Objectives

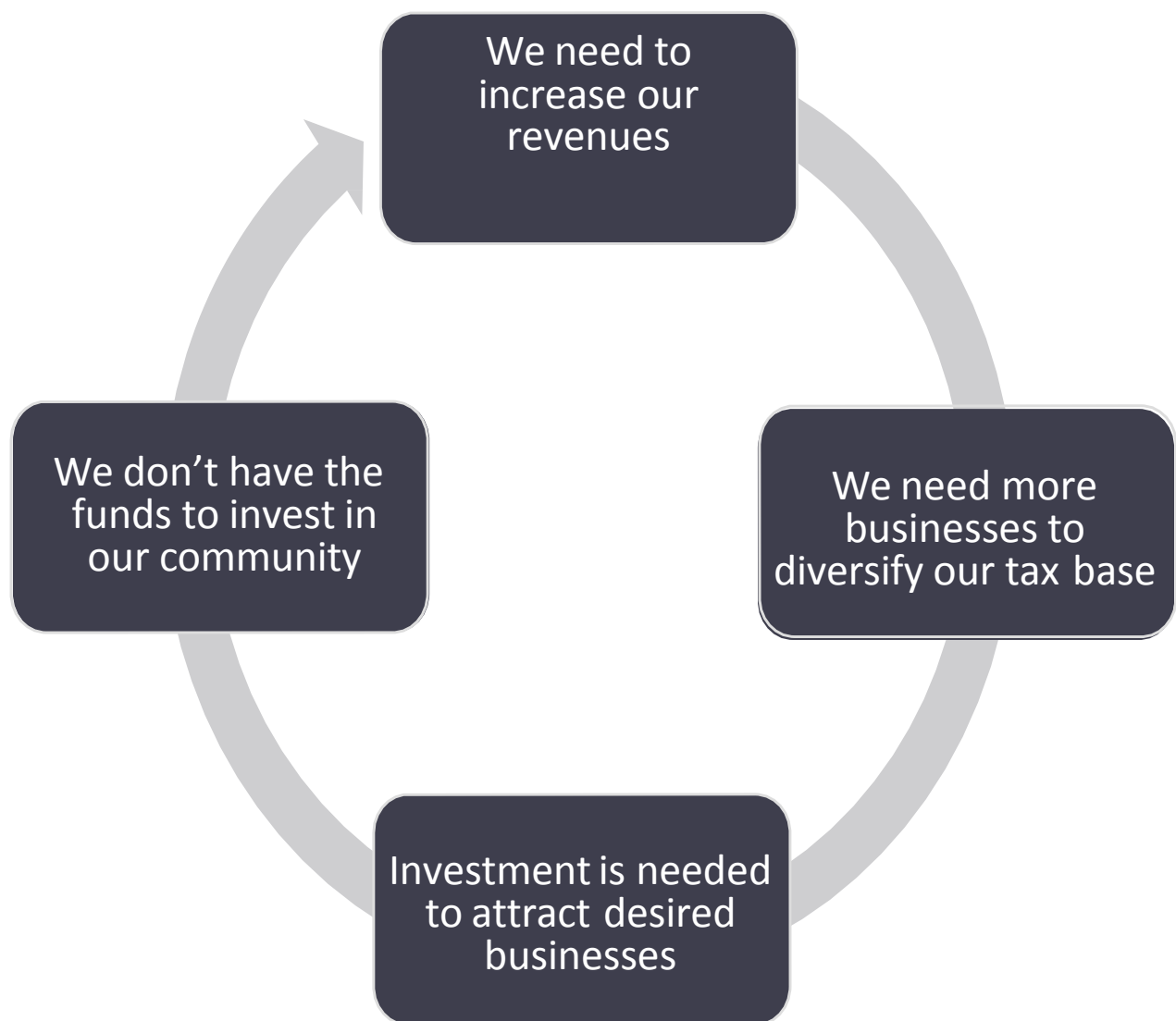


Table 1: Municipal Service Inventory

INVENTORY OF INTERNAL SERVICES	INVENTORY OF EXTERNAL SERVICES
1. Administrative Services <ul style="list-style-type: none"> a. Community and Stakeholder Communications b. Information Management Systems c. Mapping Services d. Civic Addressing e. Reception 	1. Protective Services <ul style="list-style-type: none"> a. Fire Protection b. Emergency Medical Services c. Police Protection d. Community Bylaw Enforcement e. Emergency Response
2. Financial Services <ul style="list-style-type: none"> a. Accounting b. Taxation System c. Budget Process d. Financial Reports/Controls/Audit e. Property Assessment 	2. Community Services <ul style="list-style-type: none"> a. Arts, Culture, and Recreation Programs b. Library c. Museum d. Economic Development/Tourism e. Family and Community Support Services
3. Organizational Services <ul style="list-style-type: none"> a. Human Resources b. Employee Benefits/Payroll c. Strategic Planning d. Orientation and Training e. Performance Monitoring 	3. Municipal Services <ul style="list-style-type: none"> a. Planning and Development b. Inspections and Licensing c. Public Transportation d. Weed and Pest Control e. Parks and Open Space Maintenance
4. Legislative Services <ul style="list-style-type: none"> a. Policy Development b. Legal Advice c. Council Meeting Support d. Committee Support e. Records Management 	4. Operational Services <ul style="list-style-type: none"> a. Water Treatment and Distribution b. Wastewater Collection and Treatment c. Storm Water Collection and Treatment d. Road and Sidewalk Maintenance e. Public Facility Maintenance f. Garbage and Recycling

NOTE: This lists the main groupings of services typically provided by municipalities.

Each of these services are provided through a number of different mechanisms, including internal staff, regional commissions, contracts with private service providers, agreements with other government or public service agencies, and community volunteers.

This list is incomplete. As service delivery increases and improves, additional services may be added as opportunities arise. As part of any efforts toward amalgamation, the two Towns will need to establish a shared understanding of the level of service they will collectively provide for each of the services that they deliver. This will require a service delivery review, which evaluates specific municipal services to determine the most appropriate way to provide it based on answering the following questions for each service:

Service Delivery Review

1. Do we need to continue delivering this service?
2. What do citizens expect of the service and what outcomes does Council want for the service?
3. How does the current performance compare to expected performance?
4. How is the demand for the service being managed?
5. What are the full costs and benefits of the service?
6. How can the effectiveness of the service be improved?
7. How can the efficiencies of delivering the service be improved?
8. Are there alternative ways to deliver the service?

Service delivery reviews are time and resource-intensive exercises and may involve sensitive local issues. Clear strategic objectives need to be agreed upon before undertaking reviews so that the decisions made can be tied to the collective vision for the community.

3.2 Community Capacity

That communities are complicated is clear. There is a lot going on from roads, to homes, to businesses all interacting with people of all ages and demographics. But complicated is different from complex. A rocket ship is complicated, but it is not complex. Complexity emerges from the collection of interactions within the community. Given the changing nature of these interactions and the evolving impacts from external forces, the results are unpredictable and can demonstrate no direct relationship between inputs and outputs. However, we continue to treat communities as complicated systems and build our expectations around the illusion of predictable results. For example, we annex land, rezone it for industrial purposes, and provide the necessary servicing but are confused when a successful industrial park does not appear.

While local government challenges loom, it remains the most efficient level of government because of its smaller scale and better understanding of what the people need. However, regardless of the potential efficiencies at the local level, these are rendered largely irrelevant if the municipality does not have the capacity and resources necessary to effectively manage the complexity associated with the delivery of services.

Almost every municipality in Alberta has had the notion of inter-municipal collaboration and structural reform on their agenda since the initiation of the Municipal Government Act review. While it is increasingly clear that the business as usual approach to local government will be a challenge to sustain, it does not mean that wholesale cutbacks or radical change are needed. The growing need for funding to address infrastructure deficits and replacement needs is colliding with either a shrinking, or a peaked ability to generate revenue. The ability to tax our way out of these challenges is no longer possible. Recognizing limits on how municipalities can generate revenue, the increasing costs needed for municipal servicing leads to increasing competition for fiscal resources that come with new growth and development.

Restructuring is often considered as a way to better serve citizens and plan for future growth. Residents have often chosen the small-town lifestyle but that choice is typically accompanied by expectations around municipal service standards that are more common in larger, urban settings.

There is no question that municipal finance and planning has evolved from having an inward focus to one that can no longer occur in isolation. The importance of strong relationships and a pre-existing history of collaboration, renders the restructuring to a larger municipal entity relatively simple, allowing for a stronger linkage between decision making and service delivery. However, the courage to think and act differently is necessary if any sustainable change is to occur.

3.3 Public Perspectives

The public engagement events and questionnaire were intended to engage in a conversation with the community to introduce the concept of moving forward from the Friendship Agreement, without focusing solely on amalgamation. The level of participation was relatively consistent over the course of the week (123 attendees at four (4) Black Diamond events and 143 at five (5) Turner Valley events), representing approximately 7% of the collective population over 19 events. Additionally, 269 questionnaires were either submitted in person or online between the two communities.

The events and questionnaire demonstrated a desire to engage the community differently than in past efforts and provided the opportunity to discuss services and service delivery from the perspective of citizens from both communities. While this level of information provides a glimpse at community services from the citizen's lens, it should not be considered as a comprehensive level of service analysis, but rather as an introduction into any significant challenges associated with how services are currently being provided.

The following general themes emerged as similarities between the two populations (a full summary of the public engagement responses from the individual community perspectives can be found in **Appendix 1**). Overall, the majority of the responses (85, or 53.8% in Black Diamond and 61, or 56.0% in Turner Valley) indicated they were *Somewhat Satisfied* with the overall level of service provided by the Town, with the second highest response of *Very Satisfied* (56, or 35.4% in Black Diamond and 32, or 29.4% in Turner Valley).

While the overall sentiment was a high level of satisfaction for the services that were being provided, when the individual services are considered from both a perceived level of importance and satisfaction, the Towns shared similar perspectives around areas of dissatisfaction.

Table 2: Ranking of Restructuring Priorities by Community

Rank	Restructuring Priorities	Black Diamond Score	Turner Valley Score
1	Cost of services	1.8	1.9
2	Effectiveness and Efficiency of Administration	2.8	2.4
3	Effectiveness and Efficiency of Governance	2.9	2.7
4	Local Autonomy	3.8	3.9
5	Community Identity	4.4	4.8
6	Location of Facilities	4.7	4.9

NOTE: This represents a ranking of the different priorities related to restructuring the municipalities.

Both communities shared similar perspectives around the importance of collaboration, essentially mirroring each other and indicating that the majority of services are considered *Very Important* to work on together. When asked to rank, the respondents from both communities had very similar perspectives.

While these are all anecdotal, they do represent opinions that surfaced in multiple conversations with different people. Much of the public's opinion are often based on self-generating beliefs. People adopt these because they are based on conclusions inferred by what is observed and experienced. The ability to achieve any true change is eroded by the feeling that:

- Beliefs are the truth
- The truth is obvious
- The truth is based on real data
- The self-selected data is the real data

While it is often easier to reject the negative perspectives and comments as simply coming from those citizens that can never be satisfied, it is important to recognize that people do hold these perspectives. When viewed from these perspectives, it is easier to accept that the negative comments are rational, relative to the notion that most people are interested in how any change will directly impact their best interests.

4.0 ALTERNATIVE OPTIONS

Municipalities are not static. They are constantly evolving through economic or demographic changes or through changing citizen expectations. In some cases, this changes how municipalities work with one another, or leads to more fundamental changes in how the municipalities are structured.

Decision-makers need options that go beyond conventional discussions about restructuring and transcend typical concerns over joint planning and cost-sharing. This reflects that there is no optimal structure for local government. While the Towns can take an objective analysis to support their conclusions, ultimately the Councils must apply their own judgement and relative weight to the various factors associated with restructuring and the trade-offs of pursuing any of the available options.

A typical approach to evaluating multiple options for proceeding with municipal restructuring would involve a comparative analysis of multiple scenarios. These evaluations would explore the implications of maintaining the status quo, outline the impacts of amalgamation, and examine a form of hybrid model.

4.1 Status Quo

The Towns have expressed a desire to continue to build on their shared history and move forward from the Friendship Agreement. Therefore, the status quo is not considered a preferred option.

Table 3: Existing Collaborative Efforts

Protective Services	Community Services
<ul style="list-style-type: none"> • Memorandum of Understanding for protective services to assist each other as needed • Shared Dog Pound 	<ul style="list-style-type: none"> • Recreation – Friendship Trail • Recreation – Black Diamond Arena • Recreation – Turner Valley Pool • Economic Development – Diamond Valley Days and Parade • Shared Library
Municipal Services	Operational Services
<ul style="list-style-type: none"> • Planning and Development – Inter-Municipal Development Plan • Administration – Aligned Accounting Software • Administration – Shared GIS Staff 	<ul style="list-style-type: none"> • Water – Sheep River Regional Utilities Corporation • Wastewater – Westend Regional Sewage Services Commission • Solid Waste – Garbage Collection • Solid Waste – Foothills Regional Service Commission • Solid Waste – Recycling Depot Agreement • Transportation – Joint Planning and Transit Pilot Program

NOTE: This represents an overview of the various services being shared by the towns.

Based on the historical work completed in consideration of amalgamation and the continuing partnerships through the Friendship Agreement, the Status Quo demonstrates how the towns have partnered on many initiatives that deliver essential services more effectively and efficiently.

The following sections explore the current reality in both Towns and provide a snapshot of their current financial condition, through an examination of the Audited Financial Statements. The preliminary review of the current reality is designed to evaluate whether or not there are unmitigated circumstances that would prevent a reasonable transition toward an amalgamation. While it is somewhat easy to assert that the two Towns are comparable based on their geography and relative size similarities, exploring relevant information at a next level illuminates that there are some differences between the two Towns.

4.1.1 Population Comparison

The population and profiles for Black Diamond and Turner Valley are comparable in terms of relative growth rate, total population, as well as the age distribution, with Black Diamond slightly older and both communities older than the Provincial median age.

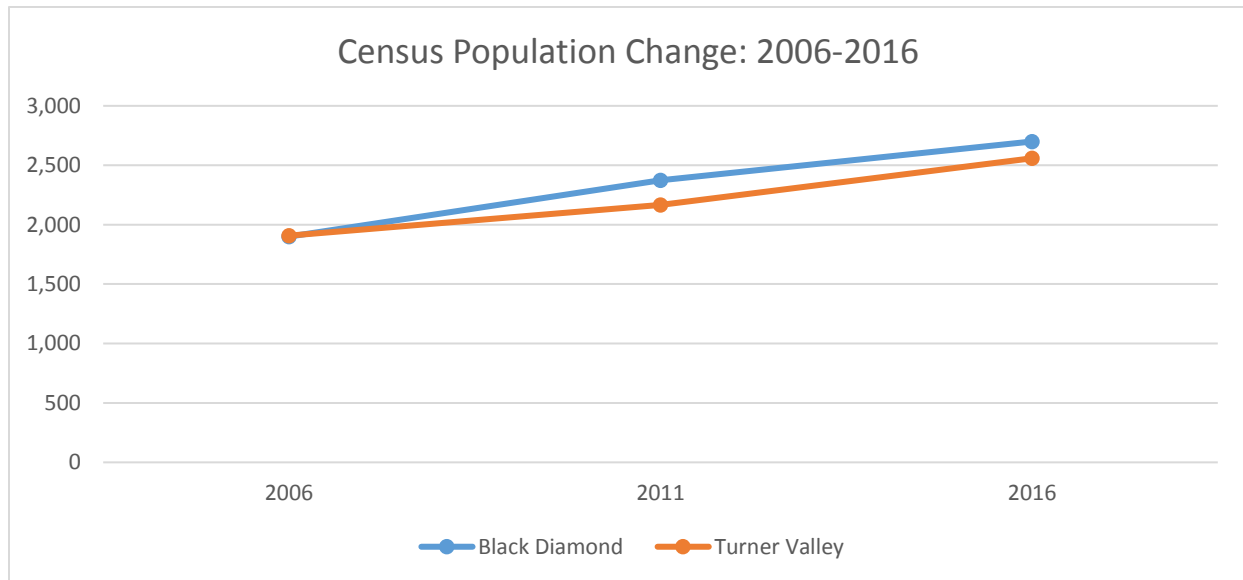


Table 4: 2016 Census of Population Characteristics

Population Characteristic	Black Diamond	Turner Valley	Alberta
Total Population	2,700	2,559	4.067 M
Age Group			
0-19	21.5%	24.0%	24.6%
20-34	14.8%	16.1%	21.8%
35-49	18.3%	21.1%	21.1%
50-64	23.0%	21.7%	18.9%
65-79	16.5%	14.9%	10.6%
80+	5.9%	2.3%	3.0%
Median Age	43	42	36.5
Children per Family	0.9	0.9	1.1
Persons per Household	2.4	2.5	2.6

NOTE: Shows total population and age distribution of both towns.

While individuals who have chosen one place over the other may have identified specific characteristics they preferred, the relative stability of the populations indicate there are not any considerable differences that would attract growth to one Town over the other.

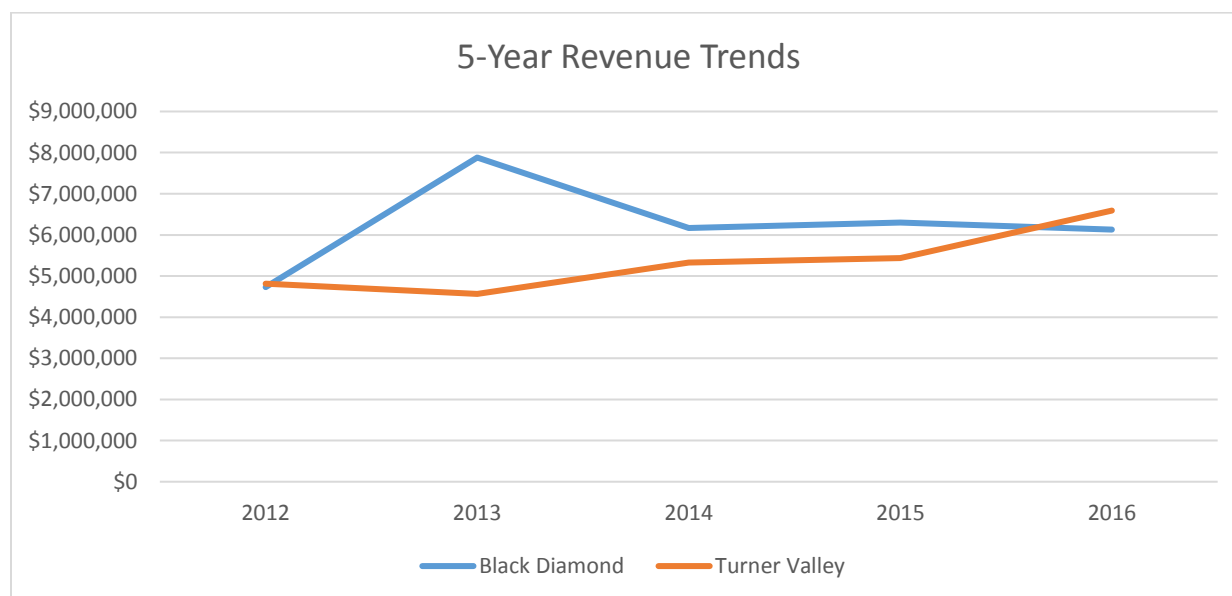
4.1.2 Revenue and Expenditures Comparison

The following tables and charts provide a snapshot of the revenues and expenditures for both towns using information obtained through the Audited Financial Statements between 2012 and 2016.

Table 5: 2016 Revenue Comparison

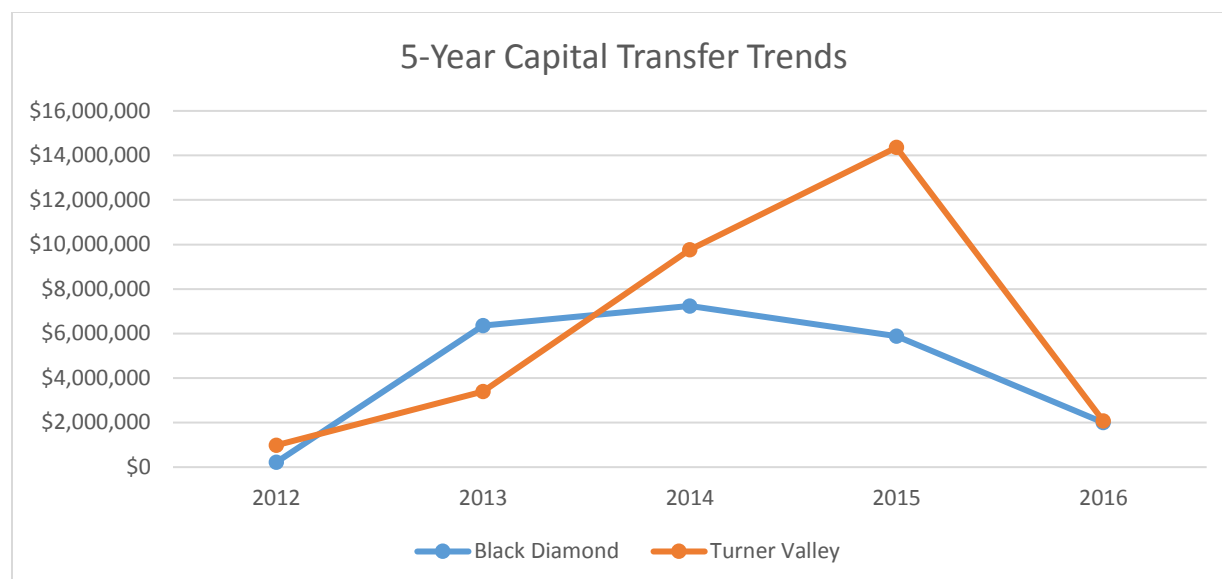
Revenue Activities	Black Diamond	Turner Valley
Net Municipal Property Taxes	\$2,739,806	\$2,976,641
Sales and User Charges	\$1,670,717	\$1,882,768
Government Transfers for Operating	\$584,926	\$883,758
Investment Income	\$132,131	\$82,478
Penalties and Costs on Taxes	\$47,117	\$122,428
Fines/Rentals/Licenses/Permits	\$466,677	\$77,565
Franchise/Concession Contracts	\$196,933	\$206,662
Development levies	\$73,714	\$82,594
Gains on Disposal of TCA	-	\$157,058
Other Revenue	\$216,163	\$119,314
Sub-Total Revenue	\$6,128,184	\$6,591,266
Government Transfers for Capital	\$2,000,512	\$2,073,925
Contributed Tangible Capital Assets	\$25,852	-
Total Revenue	\$8,153,551	\$8,665,191

NOTE: This is a comparison of the total reported revenue by major category. Government transfers for operating and capital are accounted for as revenue, but are the redistribution of Provincial and Federal tax revenues designed to help fund municipal operations and capital investments on municipal infrastructure and facilities.



The revenue spike in Black Diamond for 2013 is attributed to the transfer of provincial funding for the flood recovery efforts. While this was accounted as revenue for Black Diamond, this was for the joint benefit of both Towns. Aside from the revenue spike in 2013, and the subsequent increases in the

transfer of funds for operating purposes in 2014 and 2015, the revenues have been relatively stable and similar over the last five (5) years.



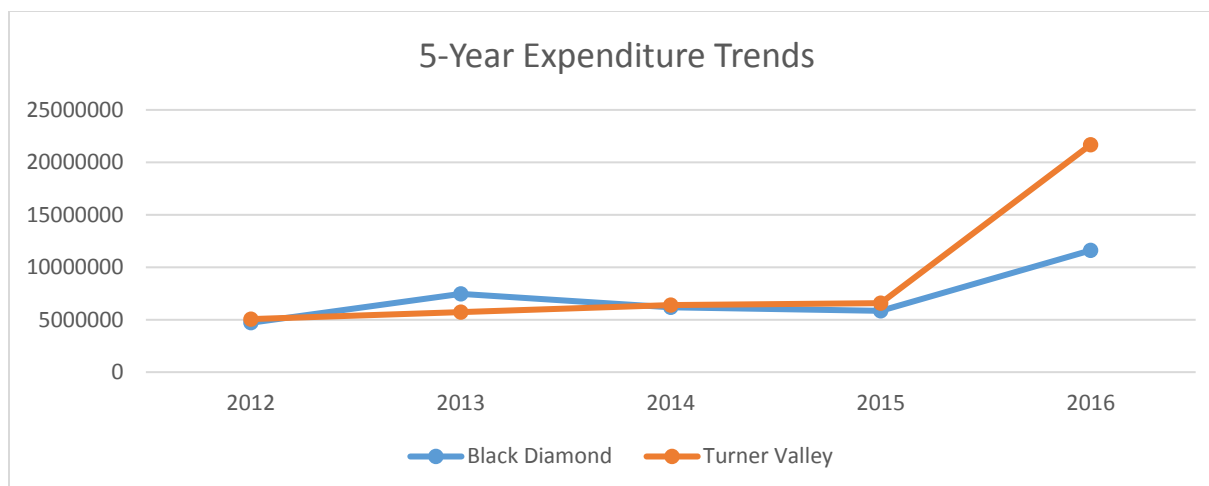
In 2013, Black Diamond directed capital funds toward roads and water/wastewater capital projects with the 2014 and 2015 increases directed toward emergency services projects. Turner Valley directed increases in revenue and capital expenditures to flood recovery projects in 2014-2016. Turner Valley has been consistently applying provincial grant transfers toward capital improvement projects, most notably towards part of its ten (10) year infrastructure priority list.

Table 6: 2016 Expenditure Comparison

Expenditures	Black Diamond	Turner Valley
Legislative	\$145,833	\$312,241
Administration	\$928,295	\$967,730
Protective Services (Bylaw, Disaster, Fire Services)	\$821,435	\$553,001
Transportation	\$960,005	\$1,654,745
Water Supply and Distribution (See * Below)	\$6,124,179	\$15,564,252
Wastewater Treatment and Disposal	\$685,217	\$650,825
Waste Management	\$165,361	\$376,218
Family and Community Support Services	\$93,398	\$60,204
Cemeteries and Crematoriums	\$54,642	\$54,642
Planning and Development	\$479,924	\$349,468
Parks and Recreation	\$949,721	\$706,315
Culture - libraries, museums, halls	\$162,014	\$298,541
Economic and Agricultural Development	-	\$138,513
Other Environmental Use/Protection	\$36,891	-
Total Expenditures	\$11,606,915	\$21,686,695

NOTE: This is a comparison of the total reported expenditures by major category.

* The difference is related to the different amount of water infrastructure that was transferred over to the Sheep River Regional Utilities Corporation (SRRUC) by each town.



Similar to the revenue spike in 2013 that came from Government Transfers for Operating Costs, Black Diamond had a jump in expenses for Disaster and Emergency Services in 2013. In 2016, the Sheep River Regional Utilities Corporation (SRRUC) was incorporated, which is the regional water system that is owned by the Towns of Black Diamond and Turner Valley through Class A shares (45% each), the M.D. of Foothills through Class A shares (10%), and the Village of Longview, who is a Class B designate. Incorporation and joint ownership required the transfer of equity in tangible capital assets in the water systems of both Towns. Black Diamond transferred its water infrastructure and metering building to SRRUC and Turner Valley transferred its infrastructure and water treatment plant. This represents a joint investment in a regional water system that will provide mutual benefit to all of the partners.

Table 7: Comparison of Tax Revenue and Rates

Tax Revenues and Requisitions	Black Diamond	Turner Valley
Real Property Taxes	\$3,665,414	\$3,817,726
Linear Property Taxes	\$35,887	\$74,745
Grants in Lieu of Taxes	\$5,890	\$25,421
Total Tax Revenue	\$3,707,191	\$3,917,892
Schools	\$925,446	\$899,937
West Winds Communities	\$42,660	\$41,314
Total Requisitions	\$968,106	\$941,251
Net Tax Revenue	\$2,739,085	\$2,976,641
Tax Rates		
Residential Tax Rate	7.61200	7.99999
Non-Residential Tax Rate	8.40240	8.57999
School Residential Rate	2.47030	2.37384
School Non-Residential Rate	3.66800	3.66800
West Winds Communities	0.12000	0.12065
Total Equalized Assessment		
Total Assessment	\$362,459,222	\$379,733,157
Residential Assessment	89.7%	91.9%
Non-Residential (Commercial and Industrial)	9.5%	5.9%
Other Non-Residential	0.8%	2.2%

NOTE: Provides a comparison of property taxes and assessment values.

Table 7 takes a closer look at the property tax portion of the revenue and compares the residential, non-residential, school, and West Winds Communities (for Senior Housing) tax rates for each town. This also provides an overview of the Total Equalized Assessment within each community, outlining the split between residential and non-residential uses.

4.1.3 Debt and Accumulated Surplus Comparison

The following tables provide a snapshot of the changes to the Debt Limit and Accumulated Surplus over the last five (5) years.

Table 8: Debt Comparison 2012-2016

Year	Black Diamond			Turner Valley		
	Debt Limit	Debt	% of Limit	Debt Limit	Debt	% of Limit
2012	7,095,242	1,375,400	19.4%	7,222,557	1,906,179	26.4%
2013	11,820,127	1,187,764	10.0%	6,848,171	1,786,363	26.1%
2014	9,249,993	1,052,777	11.4%	7,985,960	1,661,625	20.8%
2015	9,447,393	1,365,552	14.5%	8,149,935	2,173,746	26.7%
2016	9,192,279	1,197,485	13.0%	9,886,899	2,118,396	21.4%

NOTE: The Debt Limit is calculated at 1.5 times the total revenue.

The limits have fluctuated over the years, with neither municipality excessively utilising debt as part of its overall financial condition.

Table 9 Accumulated Surplus Comparison 2012-2016

Year	Black Diamond			Turner Valley		
	Unrestricted	Operating	Capital	Unrestricted	Operating	Capital
2012	849,870	1,214,323	4,241,668	-	839,170	4,638,368
2013	875,174	1,397,267	5,708,337	374,088	460,301	3,926,742
2014	950,576	1,843,812	5,808,452	700,610	801,028	2,993,032
2015	1,050,176	2,150,045	6,016,246	685,875	1,181,000	2,049,910
2016	3,152,537	2,346,441	4,510,317	3,041,592	1,346,437	4,597,359

NOTE: Accumulated Surplus is divided into different categories: unrestricted reserve funds, those restricted to operations, and those restricted to capital spending.

4.1.4 Comparison of Tangible Capital Assets

Tangible Capital Assets (TCA) are the physical assets of the community and recorded as the costs attributed to the acquisition, construction, development, or improvement of the asset. The costs, less the residual value, of the asset is amortized on a straight-line basis over the estimated useful life of each asset category.

Table 10: Tangible Capital Asset Comparison 2016

Asset Category	Black Diamond	Turner Valley
Land and Land Improvements	1,285,399	395,367
Buildings	4,067,215	5,227,721
Engineered Structures	19,192,911	19,879,129
Machinery and Equipment	1,949,208	2,024,417
Vehicles	1,318,543	1,140,131
Construction in Progress	6,228,063	9,040,464
Total	32,432,418	37,707,229

NOTE: Snapshot of the total value of assets in each town by major category.

While there are differences between the two municipalities, the purpose of this study is to evaluate the general feasibility of pursuing a broader level of collaboration or amalgamation and a more detailed exploration of the differences in assets will be undertaken as part any transition phase, should the Towns pursue an amalgamation, to establish a shared perspective on service delivery.

4.2 Comprehensive Inter-Municipal Collaboration

The notion of inter-municipal collaboration has been around for decades and has typically worked best around a tangible service that can be easily quantified in terms of a shared responsibility based on whose citizens benefit most from the service.

Often the hybrid between the “status quo” and the “amalgamation” scenario is a promotion of an enhanced collaboration model that simply states that the two partners should simply do more together than they already are.

The difference between a comprehensive and enhanced collaboration model, focuses on the deliberate collaboration on internal and/or external services that contribute toward a shared vision and objectives. The enhanced collaboration model (or simply partnering on more things) is typically based on a collaboration focused on convenience and not necessarily targeted toward any future state. The key aspects of a comprehensive approach to collaboration is based on:

- A focus on connectivity and strengthening the relationship between the two municipalities;
- Building a legacy that binds the communities beyond the emotional aspects of the individual municipalities;
- Managing all aspects of local governance as a shared accountability, which implies a collective sense of ownership over the broader community challenges and opportunities; and
- Building upon the existing Friendship Agreement between the two municipalities and other collaborative initiatives that are already in place (i.e. SRRUC, Westend Regional Sewage Services Commission, among the other collaborations outlined in Section 4.1 and Table 4).

4.3 Amalgamation

Amalgamation unites the two Towns into a single municipality focused on shared objectives. When amalgamation is considered from the perspective of comprehensive collaboration, it becomes a logical next step in the evolution of a well-established partnership between two municipalities that share a collective vision. If the inter-municipal relationship is strong, then amalgamation is largely procedural and serves to eliminate any confusion around jurisdiction, simplifying the notion of service delivery and political representation into a single municipality.

This is not to diminish the notion of amalgamation, which not only radically changes the concept of political representation and participation for citizens of both communities, but also introduces a new concept of local governance that is foreign to everyone involved. From a rational perspective, this may not seem significant, however when emotions are brought into the equation, it is easy to understand why there are so few examples of voluntary amalgamations in Alberta.

Both the administrative and political challenge of merging and the merits of creating a responsive, adaptable, and efficient municipal government should be key factors related to municipal restructuring, given its likely impact on political representation, community identity, and service delivery levels. It can seem like the decision makes sense on many levels, however there are considerable differences that must be accounted for in shifting from two municipalities that collaborate to a single municipality with an unprecedented responsibility, characterized by the following:

- In a collaborative situation, the decision making process is defined by individual community priorities and individual Council decision making processes;
- Within a unified community perspective (whether amalgamated or not), the decision making process is built around collective priorities for the broader community, regardless of jurisdiction; and
- A unified community must incorporate a shared decision making process that evaluates priorities comprehensively based on service objectives for the collective citizens.

Ultimately, what will determine the success of this initiative is the understanding that this is a choice that both Towns are voluntarily making, built around taking the next steps from the Friendship Agreement and creating joint decisions around the shared objectives.

4.3.1 Comparative Community Analysis

Through all of the conversations about amalgamation, one of the changes that was consistently identified as a concern was the requirement for municipalities with a population in excess of 5,000 to pay for policing services. This would represent a new cost to the unified municipality that neither Black Diamond nor Turner Valley currently have as part of their budgeting process and there is no uniform formula to determine what that specific cost would be.

The Alberta Justice and Solicitor General annually review the cost of municipal policing to analyze the adequacy and effectiveness of municipal policing and the financial pressures on municipalities to provide this service. There are a variety of factors that are used to evaluate policing needs, which looks not only at the total number of crimes per 1,000 population, but also the types and severity of crimes. This analysis helps inform the total number of officers needed per 1,000 population.

The total cost can be a variable based on any requirements for any specialized training or special circumstances associated with different locations. For example, higher costs per officer may be associated with more isolated locations as incentives, or in larger urban areas that have higher costs of living.

Table 11 provides a high level comparative analysis of municipalities with a population over 5,000, which would be comparable to the amalgamated total of Black Diamond and Turner Valley (approximately 5,259 based on the 2016 Census).

Table 11: Comparative Community Analysis of Municipal Policing Costs

Town	Population	Cost/Capita	Cost Estimate	% of Operating Budget
Bonnyville	6,837	\$226	\$1,545,162	8.40%
Devon	6,510	\$161	\$1,048,110	7.39%
Ponoka	6,773	\$193	\$1,307,189	9.31%
Redcliff	5,588	\$186	\$1,039,368	10.09%
Slave Lake	6,782	\$206	\$1,397,092	5.89%
St. Paul	5,844	\$230	\$1,344,120	11.53%
Stettler	5,748	\$171	\$982,908	5.90%
Vegreville	5,758	\$157	\$904,006	4.80%
Wainwright	6,289	\$155	\$974,795	6.83%

NOTE: This information is taken from the 2013 Cost Review of Alberta Municipal Police Report (CRAMP), which represents the most recent information due to the lag in reporting key statistical indicators.

This table represents the true policing costs if the two Towns were to amalgamate. While this is not intended as a true comparison based on the variations that exist in each municipality, it does provide a snapshot of the increased scale associated with communities over 5,000 from throughout the province.

4.4 Opportunities and Challenges with each Option

4.4.1 Status Quo

Maintaining the status quo introduces limitations on achieving the strategic objectives and increases strategic risks. Often the impact of these increased risks show up at some point in the future, which

reinforces the importance of taking a long-term perspective on decisions versus focusing on short-term challenges.

While it is important to recognize that there is an element of collaboration associated with the Status Quo, maintaining the current approach will keep the focus on the individual communities rather than the collective mindset outlined in section 2.0 and 3.0.

4.4.2 Comprehensive Inter-Municipal Collaboration

Building on your collaborative efforts gives you access to a bigger toolbox necessary to achieve your strategic objectives and more options for service delivery, while maintaining local autonomy. Seeking collaborative approaches versus reacting to individual events collaboratively, requires a collective mindset and is highly dependent on local leadership, which changes over time.

Without a consistent approach to collaboration, these changes in leadership that emerge over time can hinder your efforts toward achieving shared goals and objectives.

4.4.3 Amalgamation

As an outcome, Amalgamation provides the greatest opportunity to achieve your strategic objectives, however this represents a significant change and requires a commitment to developing a comprehensive change management process and following through on its recommendations.

For a change of this magnitude to result in a successful outcome, a shared accountability and commitment is required. This must extend beyond the political leadership to include individuals within each organization recognizing that everyone has a role to play in deliberately implementing change.

Amalgamation can flow naturally from collaboration as the foundation is strengthened, mindsets shift toward a more collective approach, and the strategic objectives become embedded throughout the communities.

5.0 BUSINESS CASE ANALYSIS

The decision to proceed with amalgamation must be analysed on a number of dimensions beyond simple financial benefits and costs. It will also factor a number of social and environmental considerations, as articulated in the vision statement and guiding principles.

A number of key considerations in a multiple accounts evaluation are outlined in this section of the analysis. Each of the options described in the business case have been weighed against the evaluation factors and assessed accordingly.

5.1 Financial and Economic Considerations

A number of financial and economic considerations must be understood within the context of the community objectives, provincial objectives, and service delivery in order to successfully implement a preferred option. A summary of some of the key evaluation criteria is included below:

1. Initial Cost of Change

The initial cost of implementing changes and the means to defray this cost (e.g. government grants, long term borrowing, or industry contributions) will have a bearing on the selection of a preferred option and implementation and must be understood within the evaluation process prior to proceeding with the identification of a preferred option.

2. Long-term Cost to the Community

In addition to the initial capital cost, any change will have a long-term cost that is different from the status-quo. Long term cost cannot be addressed in isolation. It's based on the services and the levels of services provided to the community. For example if the chosen option is amalgamation, the new municipality's population triggers the need to pay for RCMP services that will be an extra cost compared to the alternatives. However, the new amalgamated municipality can decide to maintain the current services and levels of services at the current state, which can result in efficiencies in decreasing the long term cost through the removal of any duplications. Alternatively, the new municipality can increase the level of service, for example increasing the frequency of snow removal, which can increase the long term cost.

3. Economic Opportunities

The two municipalities have identified economic diversification as part of their service objectives. They understand that the scale and availability of economic opportunities will be enhanced in scenarios where long-term and sustainable collaborative initiatives are in place. Options that provide this opportunity should score favourably when compared with an independent approach (status-quo scenario).

4. Perception in the Broader Region

How neighbouring communities, residents, businesses, and other regional entities perceive the two communities, their level of cooperation and collaborative approaches, plays a role in diversifying the economy. For example, options that show a unified approach to the development of communities can not only attract more development and potential residents, but also serve to retain the current businesses and population.

5. Provincial Objectives

The options that are aligned with the provincial objectives can provide more opportunities for senior government grant funding and assistance and lower the cost of implementation on the community.

5.2 Environmental Impacts

Communities and stakeholders on all levels are concerned with the environmental impacts associated with their activities. Policies and standards drafted and enforced by senior levels of government and municipalities have significant impact on the health of the environment that the citizens live in and rely on. Any decision to proceed with change must consider this important issue as part of a future transition. There is also the opportunity for the communities to not only comply with these regulations, but also lead through the implementation of “green” initiatives and environmentally conscious economic actions.

1. Natural Capital Assets

Natural capital assets and the ecosystem services they provide, are a fundamental part of any town’s infrastructure. The natural services provided by these systems provide tangible value to the community and have been quantified in the same fashion as engineered infrastructure.

2. Growth Management

The conversion of land for urban uses has an irreversible impact and contributes to rapid changes to the ecosystem, fragmenting habitats, reducing biodiversity, modifying natural cycles, and impacting energy demands. While there is continual push for growth as part of most community’s long-term sustainability strategy, without truly incorporating environmental impacts into a better understanding of the impacts of growth, the focus on municipal sustainability could create harmful impacts on the sustainability of the broader community.

5.3 Social Impacts

The municipalities have indicated that responsible governance, building community capacity, and sustainable service delivery, among other political and community considerations will be key factors in the selection of a preferred long term option for their shared governance. Each of these considerations is explored within the social impacts portion of the multiple accounts evaluation:

1. Sustainable Service Delivery

The ability to deliver services to the current generation without compromising the ability to provide services to future generations has a significant impact on increasing the quality of life and building resiliency in the community. Service delivery should be assessed from two perspectives; availability of service in the community and accessibility of that service to citizens.

2. Autonomy and Service Independence

The two municipalities, through their past initiatives, have indicated a preference for a collaborative solution to service delivery which, while enabling them to work together as two neighbouring municipalities, will also continue to offer them a degree of autonomy (for example, autonomy over locally-specific servicing strategies). The three options presented in the business case, each have a varying level of autonomy in decision making and service independence that need to be clearly understood before moving forward.

3. Citizen and Political Representation

This factor considers the communities representation and voice being heard through elected officials. Each option presents a different context for decision making at the elected level and should, therefore, consider the potential impacts on citizen participation.

5.4 Managing Risks

Risks are events or incidents that will have a negative impact on service delivery. While we can never eliminate risk, we can minimize it by effective management. This includes understanding risks, the impact and likelihood of them, deciding what needs to be done to mitigate them and the mitigation cost, and considering whether they are worth mitigating or if they can be tolerated. In short, we can't predict the future but we can plan for it.

Mitigating risks can be expensive. As an organization, you may decide that some risks are not worth doing anything about. Tolerating risks is perfectly acceptable, as long as it is an informed decision. There are two different kinds of Risks:

1. Asset Risk

Asset risk is an event where an asset is failing to perform as you need it to. Examples of asset risks are a broken water pipe or potholed road surface.

2. Strategic Risks

Strategic risks are events or occurrences that impact your ability to achieve objectives. Examples of strategic risks include:

- Possibility of reduced revenue;
- Dramatic increase in service demands;
- Changing demographics (including retiring workforce); and
- Loss of critical data or information.

5.5 Multiple Account Evaluation

This section evaluates each option using the indicators outlined in section 5.1-5.3, relative to a risk analysis as outlined in 5.4. The evaluation is made among the proposed options, comparing Comprehensive Collaboration and Amalgamation relative to the Status Quo, while assessing any potential strategic risk associated with maintaining the Status Quo. A visual representation is provided for each indicator, demonstrating the degrees of positive or negative change associated with each option. While each option is screened through the individual indicators, the decision on how to proceed must consider how all of the indicators relate to each other, which cannot be effectively summarized in a simple scorecard. This approach breaks down the options so they can be more simply understood, while digging deeper into the evaluation.

5.5.1 Financial and Economic Considerations

1. Initial Cost of Change:

MINUS -		Status Quo	PLUS +		
Amalgamation	Comprehensive Collaboration				

Status Quo: Expect no significant change to occur if the Towns maintain the current structure.

Comprehensive Collaboration: Depending on the amount, timing, and types of initiatives pursued, the initial costs of change and administration will relatively increase compared to the Status Quo. However, costs can be maintained through a clear prioritization of key, though incremental, changes.

Amalgamation: Initial costs of amalgamation will be high relative to either option based on two key factors:

- All current staff are immediately part of the new municipality. There is a belief that amalgamation will simply result in cutting staff by 50% because two organizations are merged into one, but this is not always the case. Municipal staff is associated with the services provided to the community, so staff savings cannot be simply determined until the overall level of service has been defined. There may be potential cost savings associated with eliminating duplications but this cannot be realized until the new municipality has evaluated servicing and staff requirements.
- The population will exceed 5,000, requiring the new municipality to cover the costs of policing. The formula varies according to the municipality based on need and service levels. As a general example, based on the comparative communities analysis in Table 9, the per capita costs of policing ranges between \$155 and \$230. The amalgamated population of 5,259, would generate approximately \$815,145 - \$1,209,570 in additional costs. Some of these costs would be covered through the Municipal Police Assistance Grant, which provides per capita funding to help offset the additional costs of Police service.

2. Long-term Cost

MINUS -			Status Quo	PLUS +		
				Comprehensive Collaboration	Amalgamation	

Status Quo: While the notion of Status Quo conceptually implies no major changes, continuing an independent approach will increase the competition for diminishing funds and erode the ability of each community to independently generate new revenue.

Comprehensive Collaboration: When services are delivered collaboratively, there is an opportunity for capturing efficiencies and finding effective methods to lower the long term costs to communities. Collaboration can also lower the cost of operation and administration per capita as there is a lower chance for duplications.

Amalgamation: From a service delivery perspective, the same concept applies as with Comprehensive Collaboration. Beyond the notion of greater efficiencies in service delivery, post-amalgamation provides access to the Transition Stream of funding within the Alberta Community Partnership Program, which provides access (based on the most recent budget and application) to a base amount of \$100,000 and \$400/capita to help pay for all of the work required as part of the transition.

Historic analysis of amalgamations in general, has revealed that administrative costs have increased over time, which indicates that cost savings are not absolute with Amalgamation. Provided there are continual and consistent level of service reviews as part of the evolution of the new municipality, these can be used as a tool to manage costs.

3. Economic Opportunities

MINUS -			Status Quo	PLUS +		
				Comprehensive Collaboration	Amalgamation	

Status Quo: Continuing on this path will inevitably increase the competitive environment between the Towns as the need for non-residential revenue increases. While non-governmental organizations (i.e. the Chamber of Commerce) can think on a more regional basis, a municipal economic development function will consistently seek opportunities around a narrower spectrum of winning and losing based on municipal finances.

Comprehensive Collaboration: Comprehensive Collaboration will provide more access to revenue for shared service delivery initiatives by having a broader base of customers and access to senior government grants for shared initiatives. For example, the Sheep River Regional Utility Corporation (SRRUC) provides water services to both communities. By accessing provincial grants, SRRUC was able to

upgrade the water treatment plant in Turner Valley and service both communities with clean potable water. This, in turn, enables the communities to provide water services to their residents and businesses at a lower cost compared to doing it on their own. Ultimately, by having more affordable, predictable, and reliable servicing, the two Towns are more attractive for business investments, which can diversify their tax base and create opportunities for all members of the community to live and work in Turner Valley and Black Diamond.

Amalgamation: Amalgamation can have a positive impact on this indicator as it opens up access to more developable land and human and financial resources to implement economic diversification initiatives. The implication of amalgamation demonstrates a commitment to a unified community. Beyond the collective resources that are able to be deployed for shared economic development purposes, it can inspire the perception of a greater local economy because all information is translated at a municipal level.

4. Perception in the Broader Region

MINUS -			Status Quo	PLUS +		
			Comprehensive Collaboration	Amalgamation		

Status Quo: Continuing as two (2) independent towns minimalizes the opportunity for the participation in the Calgary Growth Management Board because the populations prevent membership.

Comprehensive Collaboration: When the two communities collaborate on multiple initiatives they are sending a message to their neighbours and others that there is a clear line of communication between the two communities and that they can count on a stable environment for investment and living. If there is coordination between the policies and clarity around investment and development requirements, the risk of competition between the two municipalities are reduced and the chance of attracting businesses to the communities increases. This in turn will increase their influence in the region and strengthen their position in negotiation with their neighbours should it be required.

Amalgamation: Amalgamation takes this one step further, as there will be one community with a larger population and one Council and one Administration that has stronger representation in the region.

5. Provincial Objectives

MINUS -			Status Quo	PLUS +		
					Amalgamation Comprehensive Collaboration	

Status Quo: Changes to provincial legislation through the updates to the Municipal Government Act (MGA) and changes to Provincial grant programs are mandating broader collaboration among municipal neighbours. While maintaining the Status Quo implies that, at a minimum, the same level of collaboration will continue, it does represent some deviation from the general intent of the changes initiated as part of the MGA review.

Comprehensive Collaboration: Given the new mandates for inter-municipal planning in the development of the collaboration frameworks and development plans, moving toward more comprehensive collaboration between the Towns represents the direction proposed within the MGA and positions the communities for success in accessing provincial funding.

Amalgamation: While proposed changes to the MGA mandates collaboration through multiple planning tools and grant programs, it has not prescribed any mandates for municipal restructuring (either through amalgamation or dissolution). However, new funding streams have been established to help guide municipalities through transitions (whether amalgamating or dissolving), providing further incentives to rethink how communities currently collaborate.

5.5.2 Environmental Impacts

1. Natural Capital Assets

MINUS -			Status Quo	PLUS +		
				Comprehensive Collaboration		Amalgamation

Status Quo: Individual communities, no matter how important they consider their role in environmental stewardship, can have limited impacts if the focus is solely within their boundary. While each municipality has the ability to improve on their own consideration of managing natural assets, continued independent approaches will fail to realize the impact on natural areas outside of their individual boundaries.

Comprehensive Collaboration: Broader collaboration has the ability to improve how the communities collectively address their natural assets, as part of their broader asset management strategies.

Amalgamation: More coordinated policies can result in more influence in protecting the environment and implementing positive change. Combined municipalities cover larger area and therefore can have more influence in protecting the environment. Having one set of policies and standards for environmental protection will have the most influence in positively protecting the environment.

2. Growth Management

Status Quo			Status Quo	Status Quo		
					Comprehensive Collaboration	Amalgamation

Status Quo: Given that the Towns have already initiated a Joint Growth Strategy, the implementation of this presents a unified approach to Growth Management, regardless of whether or not the structure of the communities changes.

Comprehensive Collaboration: The implementation of the Joint Growth Strategy represents a step towards Comprehensive Collaboration and should lead to a more collaborative approach to designing planning and development policies that define a unified approach to growth.

Amalgamation: Restructuring to a single municipality not only unifies the policies and plans, but also establishes a unified decision making process over a larger area. This will minimize the potential negative impacts associated with changing Council perspectives in one of the Towns that alter the focus from a shared responsibility for managing growth to a unified pursuit of growth for financial reasons.

5.5.3 Social Impacts

1. Sustainable Service Delivery

MINUS -			Status Quo	PLUS +		
					Comprehensive Collaboration	Amalgamation

Status Quo: As with previous indicators, the notion of Status Quo as implying that things will not change fails to acknowledge that regardless of the structure of the Towns, local conditions are always changing. Maintaining an independent approach to service delivery will become more challenging as costs escalate and the competition for external funding increases.

Comprehensive Collaboration: Collaborating on service delivery will set the same levels of service to residents in both communities, reducing competition. Accessing shared services would limit using the services in one community and not paying for it and will ensure the benefits are distributed equitably. It will also increase access to human resources for operations and has the opportunity to increase the quality of service provided to residents.

Amalgamation: In the Amalgamation option, there will be no competition, as there is one community with unified levels of service. However, different levels of historical investments in communities needs to be brought to the same level over time to ensure fair treatment. This option has the least amount of restriction on human resources for operations and service delivery, which in turn can provide for the most increase in the quality of service delivery.

2. Autonomy and Service Independence

MINUS -			Status Quo	PLUS +		
Amalgamation		Comprehensive Collaboration				

Status Quo: For better and worse, maintaining the status quo ensures continued autonomy for both municipalities and provides their individual opportunities to evaluate and implement their own independent service delivery structures.

Comprehensive Collaboration: Providing shared services under a collaborative approach will reduce autonomy in decision making around those services specifically. Decisions such as setting levels of service, risk management, and financial management of those shared services needs to be made together. The levels of autonomy in decision making vary based on the type of collaborative approach. If there is a commission or a municipal corporation in place, the two municipalities will not directly make decisions for these entities in their individual councils. But if there is a collaborative initiative that is not a separate entity, there will be full autonomy for councils as they will make decisions directly as part of their regular duties.

Amalgamation: Under Amalgamation, the municipalities essentially lose all of their autonomy, as they currently know it, as it will mean one council for the combined community. Regardless of how councillors are elected (i.e. representation from the Black Diamond and Turner Valley “neighbourhoods”) they are required to represent the community as a whole and the notion of individual autonomy will no longer exist.

3. Citizen and Political Representation

MINUS -			Status Quo	PLUS +		
Amalgamation			Comprehensive Collaboration			

Status Quo: There is no change from the citizen’s perspective relative to their participation in the political process and representation on Council.

Comprehensive Collaboration: Political representation will not change in the Comprehensive Collaboration option either, as there will still be one council for each community. While the citizens

perspectives may change slightly, based on their own potential biases associated with collaborating with the other municipality, ultimately there is no change to the political process.

Amalgamation: Amalgamation will have a considerable impact on political representation, which could adversely impact civic participation if the citizens from the respective municipalities feel under-represented. Ultimately, the format for representation will be established through the new municipality's transition but, regardless of what's proposed, the citizens of both communities will perceive a loss of representation until the new municipality has matured and the historic ties to the individual communities have weakened.

5.5.4 Managing Risks

1. Managing Asset Risks

MINUS -			Status Quo	PLUS +	
				Comprehensive Collaboration	Amalgamation

Status Quo: While there is no significant change anticipated by moving forward as independent communities, it must be understood that managing asset risks is becoming increasingly challenging as the many assets approach the end of their lifecycle and that managing this independently will raise many of the similar funding challenges previously discussed.

Comprehensive Collaboration: The ability to manage asset risks and mitigate the negative impacts of risks on service delivery increases with collaboration. Collaborative approaches provide more adaptability and resources to address asset risks. For example, having a coordinated community emergency plan can assist both municipalities to respond to undesired events in a more timely-manner by giving them the opportunity to access more financial, human and administrative resources.

Amalgamation: Given that the ability to manage risk increases with collaboration, the notion of truly unifying the community as a single authority provides the most cohesive approach to incorporating risk management into the decision-making process.

2. Managing Strategic Risk

MINUS -			Status Quo	PLUS +	
				Comprehensive Collaboration	Amalgamation

Status Quo: Similarly, there is no change by maintaining the status quo, however the challenge will be around strategically planning for the future of independent communities in an environment that is increasingly demanding collaboration.

Comprehensive Collaboration: Similar to managing Asset Risks, the ability to manage Strategic Risks increases with collaboration. Working together will position both municipalities in a more favourable place to address any factors that can have a negative impact on their future decision making. By collaborating, the two municipalities can mitigate factors such as economic downturns, aging infrastructure, and funding limitations in such a way that minimizes the negative impact on their communities.

Amalgamation: While amalgamation represents the ultimate form of collaboration, it does require integrating people from two different organizations, no matter how similar, under a unified approach. Different people within the same organization will have different perspectives, opinions, and language that they used to understand risk. This can complicate decision making. Having a systematic approach to identifying and ranking risks, is an important step to develop a common language around risks and help towards making better decisions.

6.0 IMPLEMENTATION

While the three options, Status Quo, Comprehensive Collaboration, or Amalgamation, presented in the Business Case Analysis are independent of each other, it is important to understand the connections between them. The two towns are already working on multiple joint initiatives that has set the tone for their current and future collaborations. While it is relatively easy to recognize that current challenges require an unprecedented amount of resources, it is equally understood that significant tax increases that would be necessary within each municipality if they were to tackle this alone, are equally unsustainable. This moves the notion of amalgamation from an ongoing conversation to more practical actions designed to contribute toward achieving a shared outcome. “The best way to predict the future is to create it.”

6.1 Evaluate a Path Forward

Amalgamation can be a desired outcome shared by the two municipalities, but the focus needs to be on the process necessary to achieve this. When more attention is given toward achieving better outcomes associated with a collective vision than with jumping toward the final outcome, the process of incremental change itself, can contribute to building capacity and trust within the community. To achieve the desired outcome in a feasible and realistic timeframe, it is recommended to consider the three options as a process that are connected with each other rather than three independent and stand-alone options. This provides an action focused process that meets the community objectives while identifying action plans that are practical and implementable.

A critical aspect of this approach is a commitment to the joint evaluation of community objectives by both councils, linked to a mindset focused on achieving mutual benefits and understanding the motivation for change:

1. Shared investment in service delivery
2. Shared accountability for decision making toward a collective vision for the community

3. Decreased competition for growth and development

Both communities seek to jointly evaluate actions for mutual benefit, recognizing that establishing the actions is largely subjective and continually evolving as items are completed and priorities change. In order to assist in developing and evaluating actions, the following guiding questions help reflect what is important relative to the overall community objectives.

1. Diversified and Resilient Economy – does the proposed action:
 - a) Provide opportunities to strengthen and diversify the economic base?
 - b) Contribute to building a population base necessary to better serve and attract business?
 - c) Reduce competition between the two Towns and jointly work to attract new businesses?
 - d) Provide greater opportunity to jointly market the area as a preferred destination for business?
2. Integrated Policy Framework - does the proposed action:
 - a) Allow for better land use planning to protect environmentally sensitive areas?
 - b) Contribute to a more efficient use of developable land and resources?
 - c) Enable better long-term fiscal planning?
 - d) Contribute toward increasing the amount of non-residential assessment?
3. Sustainable Service Delivery - does the proposed action:
 - a) Have the potential to provide greater emphasis on customer service, developing service standards, and monitoring performance?
 - b) Have the potential to increase access to quality and affordable services that would not be possible without the sharing and better utilization of resources and coordination of efforts?
 - c) Lead to reduced lifecycle cost of service delivery?
 - d) Generate new opportunities for revenue generation?
4. Expanding Community Capacity - does the proposed action:
 - a) Strengthen human capital to serve the community and support the efforts of volunteer services?
 - b) Help preserve the character and identity of the individual communities?
 - c) Strengthen communication and collaboration among residents, service organizations and groups, and community volunteers?
 - d) Provide opportunities to leverage alternative resources that are unavailable independently?
5. Responsive Local Governance - does the proposed action:
 - a) Allow the communities to work together in the interest of mutual benefit?
 - b) Provide a stronger voice to represent shared community interests rather than competing perspectives?
 - c) Enhance the community's regional voice?
 - d) Produce a greater impact than an independent investment by the shared communities?

Table 12 outlines some of these objectives, goals and potential actions that could help achieve the desired outcome. It is important to understand that although these action items are separated, they are all inter-related and are identified individually to provide areas of focus and implementable initiatives.

Table 12: Implementation Items to move Toward a Collective Vision

Objectives	Goals	Potential Actions
1. Diversified and Resilient Economy	<ol style="list-style-type: none"> 1. Diversify tax base 2. Increase local employment opportunities 	<ul style="list-style-type: none"> • Improve local broadband service • Improve access to developable commercial lands • Business retention and expansion program • Small business and entrepreneurship program
2. Integrated Policy Framework	<p>Review and coordinate policies and procedures among the following:</p> <ol style="list-style-type: none"> 1. Planning and Development 2. Operations and Administration 3. Finance 4. Decision Making 	<ul style="list-style-type: none"> • Establish a joint land use policy • Establish a joint land use bylaw • Undertake a service review and joint needs assessment • Coordinate reserve and debt policies, mill rates, off-site Levies, and utility rates • Establish a joint evaluation process (similar to FAM) to identify and evaluate actions at shared council meetings • Develop a Joint Evaluation component of the Request for Decision process to include both Councils on decisions of regional importance
3. Sustainable Service Delivery	<ol style="list-style-type: none"> 1. Cost-effective services 2. Lower environmental impact 3. Accessible community services 	<ul style="list-style-type: none"> • Undertake a joint asset condition evaluation • Establish a unified approach to lifecycle infrastructure investment • Establish a joint operations and maintenance procedures standard • Establish unified engineering and development standards • Establish a joint policy on water demand management • Incorporate natural capital assets into a collective asset management strategy • Establish a unified parks and recreation facilities plan and development standards • Incorporate a joint Age-Friendly Community component as part of unifying community planning policies

Objectives	Goals	Potential Actions
4. Expanding Community Capacity	<ol style="list-style-type: none"> 1. Improve citizen education and awareness on civic matters 2. Develop an engaged and participatory community 	<ul style="list-style-type: none"> • Establish joint communication process that ensures messaging is consistent between the two communities on matters of regional importance and connects decisions and actions to the collective vision • Incorporate an education and awareness component into all public participation processes and events, focusing on why they are being engaged, why the communities are pursuing the particular action, and how their input will be utilized in the decision-making process • Establish a shared inventory of community service providers between the two Towns, outlining who they are, where they are located, and the services they provide
5. Responsive Local Governance	<ol style="list-style-type: none"> 1. Transparent, accountable, and accessible government 2. Stronger voice representing citizens in the region and in negotiating projects with higher levels of government 	<ul style="list-style-type: none"> • Conduct an administrative and staffing review, tied to the service review and joint needs assessment – this is of critical importance as part of an amalgamation scenario, but as the municipalities collaborate further and coordinate policies, procedures, and service delivery, this will become part of improving the efficiency and effectiveness of service delivery • Prior to amalgamation occurring, reinforce the roles and objectives of the inter-municipal committee as a collective voice that represents the shared vision for the two communities

6.2 Path to Amalgamation

While the critical component of this Study was to establish an evaluative framework to help assess the feasibility of proceeding with Amalgamation, the overarching challenge that has loomed throughout has been the relationship to the October, 2017 municipal election.

The evaluation of the key indicators, strategic objectives, and the actions required as part of a future transition, in concert with the ongoing engagement with the elected officials, citizens of both communities, and a review of the Provincial requirements for Amalgamation Applications, have led to the conclusion that it is unreasonable to expect any restructuring to occur prior to the election.

Part of the rationale behind engaging in the conversation about amalgamation again, was in an attempt to make the change for this election. While this is not a feasible option, without a significant delay in the timing of the election, it should not preclude the communities from initiating the process to work towards implementation of the defined actions as an ongoing evaluation of the desire to amalgamate.

The following items outline the requirements for proceeding with an application to amalgamate, as outlined within the current legislation, which, in accordance with consultation with Municipal Affairs, is not expected to change as part of the adoption of the new Municipal Government Act. Appendix 2 provides more detailed legislation for amalgamation applications and, considering moving forward with an amalgamation requires annexation between the two towns, Appendix 3 outlines the principles of annexation that are used by the Municipal Government Board:

6.2.1 Application requirements

This section provides an overview of those items that are required as part of the application. The application to restructure is not overly complicated, however it is the transition to the newly structured municipality that presents the complexity associated with a change of this scale.

Beyond the items listed here, there is another element that outlines other items that “may” be required to be addressed as part of any application, i.e. assessment and taxation, before a final decision has been rendered.

1. Municipal name and status

As part of the application, the Towns must agree on the name of the new municipality and confirm the status of the municipality, as outlined in the MGA (e.g. to retain a Town status the population must exceed 1,000 and the majority of buildings are on parcels smaller than 1,850 square metres). In this case, you would need to confirm that the proposed name (e.g. Diamond Valley, should that be what you decide to pursue) does not match any other municipal name in Alberta or infringe on any registered trademark in Canada.

2. Boundary and annexation

As part of the legislation, the matter of contiguous boundaries between the Towns must be addressed prior to amalgamation being approved. As part of the official application a legal land description that includes all of the proposed annexed lands must be included.

While annexation of the lands between the two municipalities has always been understood to be a part of any future application, there are further complications with the timing of the additional lands being considered for annexation as part of the negotiations with the Municipal District as part of the Joint Growth Study. As the Towns determine to proceed with amalgamation, the annexations should be considered as a single application to ensure that the process to create the new municipal boundary is time-sensitive.

3. Council representation

The application must consider both the total number of Councillors and desired status of the Chief Elected Official, as well as the geographic description of how Council representatives will be distributed. For example, the newly incorporated Town could determine that three (3) Councillors could be elected from the geographic ward of Black Diamond, the other three (3) from the geographic ward of Turner Valley, with the Mayor elected at-large.

4. Location of the municipal office

Given that the two existing municipalities will be merging into a single organization, part of the application requires the new municipality to determine where it will be located. Beyond the emotional attachments and potential public challenges with choosing a location, there are additional challenges that cannot be effectively determined until the public building assets have been evaluated in comparison with the staffing needs that are based on the joint servicing and needs assessment.

Without over-complicating the process, the Towns could simply determine that either of the current locations will serve as the initial office until a thorough needs assessment has determined what the long-term needs are for office space.

5. Proposed Incorporation Date

The proposed incorporation date must either be provided as part of the application, which will coincide with the effective date of the annexation, or this will be outlined by the Minister upon consideration of the application.

6.2.2 Transition elements

While there is no way to detail a one-size fits all approach to transition, the following key elements will need to be addressed once the new municipality has been incorporated.

1. Interim leadership and election

Upon determining to proceed with the submission of the application, the Towns will need to consider the timing between the effective date the new municipality will be incorporated relative to the next municipal election, or planned by-election. Once this has been established, the interim Council will need to be defined within the application, as well as the interim Chief Administrative Officer (CAO) that will be tasked with leading the transition until the elected Council of the newly incorporated municipality has the chance to choose the CAO.

Depending on the timing of the application relative to the proposed effective date and any scheduled municipal elections, the Council of the proposed new municipality can be elected prior to the effective date, but they will not be officially sworn in prior to the effective date of amalgamation.

2. Financial transition

Each of the Towns must conduct a financial audit, in accordance with their usual practice, prior to amalgamation. Depending on the timing of the effective date of incorporating the new municipality, a financial audit will be required between the effective date and December 31 of that year.

As part of the financial transition, the Towns will need to consider any current unique financial situations. For example, if there are any current tax treatments that were associated with historical annexations, these considerations will need to be factored into any differential tax treatments on parcels within the new municipality. Similarly, if there are any Local Improvement Areas that have their own tax treatments, these will need to be identified as well.

Upon finalization of the Towns desire to proceed with an official application for amalgamation, as part of the new incorporation, alternative tax treatments may be defined to deal with pre-existing debt servicing that are defined to specific geographic areas and for specific timeframes. If approved by the Province, these revenues can only be used to service the debt.

Considering the amalgamation requires a concurrent annexation, regardless of the broader negotiations associated with the Joint Growth Strategy, this could lead to financial compensation requirements as part of the agreement with the Municipal District. If the annexation negotiations result in the need for compensation, this will need to be incorporated into the financial transition for the new municipality.

3. Labour transition

Upon incorporation, all employees from the current municipalities become staff of the new municipality. Depending on the timing of the servicing and joint needs assessment reviews and corresponding staffing review, a request to address the integration of employees, can be included as part of the application.

Beyond addressing transitional staffing as part of the application, the staff review could take place as an initial step of the new municipality to evaluate the staffing needs relative to the service standards that have been established.

4. Administrative transition

All existing bylaws of the Towns will continue to remain in existence until the new municipality either repeals or replaces the current bylaws. As part of an incremental approach to amalgamation that outlines key collaborative steps along the way, the Towns could engage in establishing joint bylaws, policies, and procedures that would facilitate the transition.

As part of all bylaws transitioning to the new municipality, all emergency management bylaws and plans will transition as well. The Towns can work to consolidate roles, responsibilities, and plans prior to the application or include this as a proposed provision to be included in the Order in Council addressing the amalgamation.

6.2.3 Consultation elements

1. Local authorities

There are two distinct requirements to consult with the broader public as part of the amalgamation. Considering the annexation requirement as well, it will be important that all aspects of the amalgamation and annexation proposals are included under a single consultation effort to ensure you do not have to duplicate the process. The first requirement involves engaging potentially locally impacted authorities, i.e. M.D. of Foothills, Alberta Health, Alberta Transportation, School Board/District, SRRUC, Westend Regional Sewer Services Commission, Sheep River Library, among others considered impacted by the amalgamation and/or the annexation.

2. Landowners in annexation area

As part of considering those potentially affected by the amalgamation and annexation, beyond local authorities, the land owners within the defined annexation area must be consulted throughout the process providing them the opportunity to raise any concerns they have with becoming part of the new municipality and providing the Towns with the opportunity to negotiate a mutually beneficial response without relying on the Municipal Government Board to render a decision.

3. Citizens

In addition to those considered potentially affected by the proposed changes, the process needs to continue engaging with the citizens of the Towns. While the Province makes it clear that a plebiscite is not required, the application must include the process that was used to engage the citizens as part of the amalgamation process as well as a summary of the views that were expressed throughout the process.

6.2.4 Key considerations

The previous sections outline the requirements for the application itself (which is detailed further based on the legislation in Appendix 2). Given the transitional nature of amalgamation and the incremental

process to successfully restructuring as an individual municipality, the following major projects will be required to assess and evaluate how the newly restructured municipality will function:

- 1. Core service analysis and asset management framework:** As the two municipalities transition into a single organization, you will have to jointly evaluate the services that you intend to provide, the level of service you intend to provide, and how this relates to your overall asset inventory. This will inform the new municipality on how to proceed with future capital planning and establish an overall inventory of the assets that each municipality is bringing into the amalgamation.
- 2. Core staff review:** Upon establishing an understanding of the service delivery model and asset inventory, the new municipality will require an overall staff review to identify what the community needs in order to provide the desired level of service.
- 3. Administrative and policy review:** The restructuring requires an in-depth review of the various policies, plans, strategies, bylaws, and administrative procedures that each municipality currently uses. This will include how current elements can be adapted to the new municipality and areas that require completely new approaches. While this is outlined as part of the transition process of amalgamation, incrementally moving toward joint policies and bylaws can represent individual projects that reinforce collaboration between the two municipalities.

7.0 FUTURE STEPS

Understanding that the financial and human resources are limited, the key to success is joint evaluation and agreeing on priorities for both communities, while working within the context of the Guiding Principles and Community Objectives. Once the communities have reviewed the Amalgamation Feasibility Study and selected a preferred option, they will need to jointly prioritize the potential actions outlined in Section 6.0.

Appendix 4 provides a sample approach that can be used as part of that process. As part of the ongoing implementation, the focus on incremental change requires a perspective that seeks to achieve short-term wins that prioritize the “easily attainable” first. This demonstrates a commitment to mutual benefits and builds trust within the community.

Amalgamation Feasibility Study

APPENDIX 1

Summary Responses to Public Engagement

SUMMARY OF THE COMMUNITY ENGAGEMENT EVENTS IN BLACK DIAMOND AND SURVEY RESPONSES FROM BLACK DIAMOND RESIDENTS

1. Participation:

Question #1 asked where the respondents lived. Between hard copies of the survey that were left at the community events as well as those dropped off at the Town Hall, a total of **49** surveys were submitted and a total of **110** online surveys were submitted by those that called Black Diamond home (note, that one (1) response was from a business owner in Black Diamond).

In addition to the survey submissions, there were four (4) events held in Black Diamond, attracting **123** attendees.

2. Tenure in the community:

Question #2 asked those that indicated they lived in the community to outline how long they have lived there. The following represents a total summary of responses. The majority of all participants indicated that they have lived in the Town for over 10 years (**42.7%**), with a more even distribution among those who responded online.

Table 1: Total Responses

<1 year	1-5 years	5-10 years	10+ years	NA	Total
8	42	39	67	1	157
5.1%	26.8%	24.8%	42.7%	0.6%	100.0%

3. Perspectives on Service Levels:

As part of any transition moving forward, regardless of how the communities proceed, part of the intent of the community engagement events was to gauge the perspectives of the residents around the services that they are receiving. While this represents a high level overview, it is intended to compare the perceived importance with the perceived level of satisfaction to use as a baseline for the two communities moving forward.

The table below represents a comparative evaluation of the results of Question #3, ranking the importance of the various services, and Question #4, ranking the overall level of satisfaction with each service. For example, while Water and Sewer services were nearly unanimously deemed *Somewhat important* or *Very Important*, it also had the fifth highest level of dissatisfaction, with 14.0% indicating they were *Not Very Satisfied* or *Not at all Satisfied*.

Table 2: Comparative Evaluation – Importance and Satisfaction

Services	Level of Importance	Services	Level of Dissatisfaction
Water/Sewer	98.8%	Bylaw Enforcement	25.9%
Protective services	98.8%	Planning	25.0%
Garbage/Recycling	96.3%	Street/Sidewalk maintenance	16.8%
Street/Sidewalk maintenance	94.3%	Public Transportation	14.8%
Planning	85.5%	Water/Sewer	14.0%
Parks/Paths/Open Space	81.3%	Parks/Paths/Open Space	13.9%
Bylaw Enforcement	80.0%	Recreation Facilities	13.8%
Snow removal	87.6%	Snow removal	11.5%
Library	67.9%	Arts/Culture	11.5%
Recreation Facilities	75.6%	Garbage/Recycling	10.1%
FCSS	72.5%	Library	7.6%
Arts/Culture	62.9%	Protective services	6.9%
Public Transportation	45.0%	FCSS	4.5%

NOTE: Each service is first ranked in order of the overall level of importance (combining those that answered *Somewhat Important* or *Very Important*) and each service is also ranked based on the level of dissatisfaction (combining those that answered *Not Very Satisfied* or *Not at all Satisfied*).

Table 3: Total Responses – Level of Importance for each Service

Services	Very Important	Somewhat Important	Not Very Important	Not at All Important	Unsure
Garbage/Recycling	73.1%	23.1%	3.8%	0.0%	0.0%
Water/Sewer	92.5%	6.3%	0.0%	0.6%	0.6%
Protective services	85.6%	13.1%	1.3%	0.0%	0.0%
Street/Sidewalk maintenance	50.9%	43.4%	3.8%	1.9%	0.0%
Snow removal	37.3%	50.3%	8.7%	3.1%	0.6%
Parks/Paths/Open Space	45.6%	35.6%	13.1%	5.6%	0.0%
Recreation Facilities	33.1%	42.5%	16.3%	7.5%	0.6%
FCSS	31.3%	41.3%	18.1%	6.3%	3.1%
Arts/Culture	24.5%	38.4%	22.0%	13.8%	1.3%
Library	33.3%	34.6%	17.6%	13.2%	1.3%
Planning	49.7%	35.8%	10.7%	3.1%	0.6%
Bylaw	39.4%	40.6%	14.4%	5.0%	0.6%
Public Transportation	13.1%	31.9%	33.1%	20.6%	1.3%

Table 4: Total Responses – Level of Satisfaction for each Service

Services	Very Satisfied	Somewhat Satisfied	Not Very Satisfied	Not at All Satisfied	Unsure
Garbage/Recycling	58.2%	30.4%	8.9%	1.3%	1.3%
Water/Sewer	55.4%	29.9%	10.2%	3.8%	0.6%
Protective services	67.3%	23.3%	6.3%	0.6%	2.5%
Street/Sidewalk maintenance	30.3%	49.7%	13.5%	3.2%	3.2%
Snow removal	47.1%	38.9%	7.6%	3.8%	2.5%
Parks/Paths/Open Space	39.2%	42.4%	9.5%	4.4%	4.4%
Recreation Facilities	27.7%	38.4%	8.2%	5.7%	20.1%
FCSS	27.1%	28.4%	2.6%	1.9%	40.0%
Arts/Culture	28.0%	36.9%	8.3%	3.2%	23.6%
Library	56.7%	20.4%	3.2%	4.5%	15.3%
Planning	12.2%	46.8%	17.3%	7.7%	16.0%
Bylaw	30.4%	34.8%	14.6%	11.4%	8.9%
Public Transportation	16.1%	31.0%	7.7%	7.1%	38.1%

4. Overall Satisfaction:

Question #5 asked people to provide their general level of satisfaction overall, indicating their perspective on how well the Town is doing in delivery services. Despite perspectives or comments that were somewhat negative around individual services, the overall level of satisfaction appears relatively high. Only 8.2% (13 total responses) indicated a level of dissatisfaction with the overall level of service.

Table 5: General Level of Satisfaction

Very Satisfied	Somewhat Satisfied	Not Very Satisfied	Not at All Satisfied	Unsure	Total
56	85	13	0	4	158
35.4%	53.8%	8.2%	0.0%	2.5%	100.0%

5. Collaborating on Service Delivery:

Question #6 asked the respondents to consider the different services from the perspective of the importance of collaborating on these services. The following table provides an overall ranking based on the combination of those that responded either *Very Important* or *Somewhat Important*.

Table 6: Overall Level of Importance for Collaborative Services

Services	Level of Importance
Water/Sewer	89.0%
Garbage/Recycling	87.7%
Protective Services	85.3%
Recreation Facilities	80.6%
Bylaw Enforcement	78.2%
Planning	76.3%
Parks/Paths/Open Space	75.6%
Library	75.3%
Street/Sidewalk maintenance	73.2%
Snow removal	72.4%
FCSS	66.9%
Arts/Culture	64.7%
Public Transportation	56.1%

Table 7: Total Responses – Level of Importance for each Service

Services	Very Important	Somewhat Important	Not Very Important	Not at All Important	Unsure
Garbage/Recycling	70.3%	17.4%	3.2%	5.2%	3.9%
Water/Sewer	78.7%	10.3%	3.2%	3.2%	4.5%
Protective services	70.5%	14.7%	6.4%	5.8%	2.6%
Street/Sidewalk maintenance	43.9%	29.3%	12.7%	9.6%	4.5%
Snow removal	44.2%	28.2%	14.1%	10.3%	3.2%
Parks/Paths/Open Space	44.9%	30.8%	12.8%	9.0%	2.6%
Recreation Facilities	45.8%	34.8%	5.8%	8.4%	5.2%
FCSS	40.8%	26.1%	12.7%	8.9%	11.5%
Arts/Culture	32.7%	32.1%	17.3%	10.9%	7.1%
Library	49.4%	25.9%	9.5%	10.1%	5.1%
Planning	50.0%	26.3%	8.3%	9.6%	5.8%
Bylaw	50.6%	27.6%	8.3%	9.0%	4.5%
Public Transportation	32.3%	23.9%	16.1%	13.5%	14.2%

6. Priorities:

Question #7 asked for perspectives relative to the two Towns moving toward a more unified approach to governance. Respondents were asked to rank each of the priorities based on what they felt was most important as part of any transition (with 1 being the most important and 6 being the least important). The following table represents a summary of the average score for each of the priorities.

Table 8: Total Responses – Importance of Unified Approach

Priorities	Average Response
Location of Facilities	4.7
Local Autonomy	3.8
Costs of Services	1.8
Effectiveness & Efficiency of Administration	2.8
Local Identity	4.4
Effectiveness & Efficiency of Local Government	2.9

Considering the general feedback from the community engagement events and the comments provided as part of the survey responses, it is clear that the *Costs of Services* with a total average score of **1.8**, represents the key priority outlined by those that participated in the events.

7. Importance of Other Services Comments:

Question #8 asked respondents to consider other collaborative opportunities beyond the typical municipal services. The following table provides an overall ranking based on the combination of those that responded either *Very Important* or *Somewhat Important*.

Table 9: Total Responses - Level of Importance Ranking

Other Opportunities	Level of Importance
Joint Purchase of Equipment	89.1%
Joint Community Planning	88.6%
Administrative Services	88.5%
Economic Development Planning	88.4%
Local Governance Representation	87.8%
Stronger Regional Voice	87.3%
Seniors Care/Housing	86.5%
Marketing the Region	80.4%

Table 10: Total Responses – Importance of Collaborative Services

Other Opportunities	Very Important	Somewhat Important	Not Very Important	Not at All Important	Unsure
Marketing the Region	50.0%	30.4%	11.4%	7.0%	1.3%
Economic Development Planning	61.9%	26.5%	7.7%	3.2%	0.6%
Joint Community Planning	57.0%	31.6%	5.7%	5.1%	0.6%
Stronger Regional Voice	58.9%	28.5%	7.0%	3.8%	1.9%
Joint Purchase of Equipment	48.7%	40.4%	6.4%	3.8%	0.6%
Seniors Care/Housing	54.5%	32.1%	9.0%	3.2%	1.3%
Administrative Services	67.3%	21.2%	3.8%	7.1%	0.6%
Local Governance Representation	60.9%	26.9%	3.8%	7.1%	1.3%

SUMMARY OF THE COMMUNITY ENGAGEMENT EVENTS IN TURNER VALLEY AND SURVEY RESPONSES FROM TURNER VALLEY RESIDENTS

1. Participation:

Question #1 asked where the respondents lived. Between hard copies of the survey that were left at the community events as well as those dropped off at the Town Hall, a total of **54** surveys were submitted and a total of **56** online surveys were submitted by those that called Turner Valley home (note, that three (3) responses were from business owners in Turner Valley).

In addition to the survey submissions, there were five (5) events held in Turner Valley, attracting **143** attendees.

2. Tenure in the community:

Question #2 asked those that indicated they lived in the community to outline how long they have lived there. The following represents a total summary of responses and breaks it down further based on the tenure by those that completed the survey by hand and those that submitted it online. The majority of all participants indicated that they have lived in the Town for over 10 years (**46.4%**).

Table 11: Total Responses:

<1 year	1-5 years	5-10 years	10+ years	NA	Total
6	29	21	51	3	110
5.5%	26.4%	19.1%	46.4%	2.7%	100.0%

3. Importance of Services Comments:

As part of any transition moving forward, regardless of how the communities proceed, part of the intent of the community engagement events was to gauge the perspectives of the residents around the services that they are receiving. While this represents a high level overview, it is intended to compare the perceived importance with the perceived level of satisfaction to use as a baseline for the two communities moving forward.

The table below represents a comparative evaluation of the results of Question #3, ranking the importance of the various services, and Question #4, ranking the overall level of satisfaction with each service. For example, while Street/Sidewalk maintenance had nearly 92% of respondents indicate this was either *Somewhat important* or *Very important*, it also had the fifth highest level of dissatisfaction, with 25.5% indicating they were *Not Very Satisfied* or *Not at all Satisfied*.

Table 12: Comparative Evaluation – Importance and Satisfaction

Services	Level of Importance	Services	Level of Dissatisfaction
Water/Sewer	100.0%	Recreation Facilities	36.4%
Protective services	97.3%	Planning	33.3%
Garbage/Recycling	97.3%	Snow removal	26.9%
Street/Sidewalk maintenance	91.9%	Bylaw Enforcement	25.7%
Snow removal	89.2%	Street/Sidewalk maintenance	25.5%
Planning	84.8%	Parks/Paths/Open Space	23.9%
Parks/Paths/Open Space	83.6%	Public Transportation	21.3%
Recreation Facilities	81.1%	Arts/Culture	18.5%
Library	79.1%	FCSS	11.0%
Bylaw Enforcement	75.7%	Garbage/Recycling	10.1%
FCSS	65.5%	Protective services	8.3%
Arts/Culture	61.3%	Water/Sewer	6.4%
Public Transportation	44.1%	Library	3.7%

NOTE: Each service is first ranked in order of the overall level of importance (combining those that answered *Somewhat Important* or *Very Important*) and each service is also ranked based on the level of dissatisfaction (combining those that answered *Not Very Satisfied* or *Not at all Satisfied*).

Table 13: Total Responses – Level of Importance for each Service

Services	Very Important	Somewhat Important	Not Very Important	Not at All Important	Unsure
Garbage/Recycling	70.9%	26.4%	1.8%	0.9%	0.0%
Water/Sewer	92.8%	7.2%	0.0%	0.0%	0.0%
Protective services	89.2%	8.1%	2.7%	0.0%	0.0%
Street/Sidewalk maintenance	48.6%	43.2%	6.3%	0.9%	0.9%
Snow removal	45.0%	44.1%	9.9%	0.9%	0.0%
Parks/Paths/Open Space	39.1%	44.5%	11.8%	4.5%	0.0%
Recreation Facilities	33.3%	47.7%	12.6%	4.5%	1.8%
FCSS	27.3%	38.2%	19.1%	10.9%	4.5%
Arts/Culture	19.8%	41.4%	26.1%	11.7%	0.9%
Library	42.7%	36.4%	17.3%	2.7%	0.9%
Planning	42.9%	42.0%	10.7%	2.7%	1.8%
Bylaw	36.0%	39.6%	11.7%	11.7%	0.9%
Public Transportation	7.2%	36.9%	27.9%	26.1%	1.8%

Table 14: Total Responses – Level of Satisfaction for each Service

Services	Very Satisfied	Somewhat Satisfied	Not Very Satisfied	Not at All Satisfied	Unsure
Garbage/Recycling	59.6%	30.3%	8.3%	1.8%	0.0%
Water/Sewer	55.5%	38.2%	4.5%	1.8%	0.0%
Protective services	67.0%	22.9%	8.3%	0.0%	1.8%
Street/Sidewalk maintenance	32.7%	40.9%	18.2%	7.3%	0.9%
Snow removal	41.7%	30.6%	14.8%	12.0%	0.9%
Parks/Paths/Open Space	32.1%	42.2%	19.3%	4.6%	1.8%
Recreation Facilities	24.5%	32.7%	25.5%	10.9%	6.4%
FCSS	21.1%	40.4%	8.3%	2.8%	27.5%
Arts/Culture	24.1%	42.6%	13.0%	5.6%	14.8%
Library	74.1%	14.8%	2.8%	0.9%	7.4%
Planning	11.1%	40.7%	18.5%	14.8%	14.8%
Bylaw	27.5%	33.9%	12.8%	12.8%	12.8%
Public Transportation	13.0%	31.5%	12.0%	9.3%	34.3%

4. Overall Satisfaction:

Question #5 asked people to provide their general level of satisfaction overall, indicating their perspective on how well the Town is doing in delivery services. Despite perspectives or comments that were somewhat negative around individual services, the overall level of satisfaction appears relatively high. Only 14.7% (16 total responses) indicated a level of dissatisfaction with the overall level of service.

Table 15: General Level of Satisfaction

Very Satisfied	Somewhat Satisfied	Not Very Satisfied	Not at All Satisfied	Unsure	Total
32	61	13	3	0	109
29.4%	56.0%	11.9%	2.8%	0.0%	100.0%

5. Collaborating on Service Delivery:

Question #6 asked the respondents to consider the different services from the perspective of the importance of collaborating on these services. The following table provides an overall ranking based on the combination of those that responded either *Very Important* or *Somewhat Important*.

Table 16: Overall Level of Importance for Collaborative Services

Collaborate	Level of Importance
Water/Sewer	99.1%
Garbage/Recycling	96.3%
Protective services	95.4%
Parks/Paths/Open Space	91.7%
Snow removal	89.0%
Library	87.3%
Recreation Facilities	86.4%
Planning	86.1%
Street/Sidewalk maintenance	84.5%
Bylaw Enforcement	82.4%
FCSS	73.4%
Arts/Culture	72.5%
Public Transportation	66.1%

Table 17: Total Responses – Level of Importance for each Service

Services	Very Important	Somewhat Important	Not Very Important	Not at All Important	Unsure
Garbage/Recycling	81.7%	14.7%	2.8%	0.0%	0.9%
Water/Sewer	85.3%	13.8%	0.0%	0.0%	0.9%
Protective services	82.6%	12.8%	1.8%	1.8%	0.9%
Street/Sidewalk maintenance	54.5%	30.0%	11.8%	1.8%	1.8%
Snow removal	57.8%	31.2%	7.3%	2.8%	0.9%
Parks/Paths/Open Space	53.2%	38.5%	5.5%	0.9%	1.8%
Recreation Facilities	60.0%	26.4%	9.1%	2.7%	1.8%
FCSS	41.3%	32.1%	13.8%	6.4%	6.4%
Arts/Culture	42.2%	30.3%	16.5%	6.4%	4.6%
Library	67.3%	20.0%	7.3%	2.7%	2.7%
Planning	62.0%	24.1%	6.5%	2.8%	4.6%
Bylaw	58.3%	24.1%	9.3%	7.4%	0.9%
Public Transportation	34.9%	31.2%	13.8%	12.8%	7.3%

6. Priorities:

Question #7 asked for perspectives relative to the two Towns moving toward a more unified approach to governance. Respondents were asked to rank each of the priorities based on what they felt was most important as part of any transition (with 1 being the most important and 6 being the least important). The following tables represent a summary of the average score for each of the priorities.

Table 18: Total Responses – Importance of Unified Approach

Priorities	Average Response
Location of Facilities	4.9
Local Autonomy	3.9
Costs of Services	1.9
Effectiveness & Efficiency of Administration	2.4
Local Identity	4.8
Effectiveness & Efficiency of Local Government	2.7

Considering the general feedback from the community engagement events and the comments provided as part of the survey responses, it is clear that the *Costs of Services* with a total average score of **1.9**, represents the key priority outlined by those that participated in the events.

7. Importance of Other Services Comments:

Question #8 asked respondents to consider other collaborative opportunities beyond the typical municipal services. The following tables provide an overall ranking based on the combination of those that responded either *Very Important* or *Somewhat Important*, as well as providing the full spectrum of responses for each of the services as a total and broken down by hard copy submissions and online responses.

Table 19: Total Responses - Level of Importance Ranking

Other Opportunities	Level of Importance
Economic Development Planning	95.4%
Administrative Services	94.5%
Local Governance Representation	94.5%
Joint Planning	93.6%
Joint Purchase of Equipment	93.6%
Marketing the Region	90.8%
Seniors Care/Housing	89.0%
Stronger Regional Voice	88.9%

Table 20: Total Responses – Importance of Collaborative Services

Other Opportunities	Very Important	Somewhat Important	Not Very Important	Not at All Important	Unsure
Marketing the Region	50.5%	40.4%	6.4%	2.8%	0.0%
Economic Development Planning	67.0%	28.4%	2.8%	1.8%	0.0%
Joint Planning	56.9%	36.7%	3.7%	2.8%	0.0%
Stronger Regional Voice	62.0%	26.9%	10.2%	0.9%	0.0%
Joint Purchase of Equipment	51.4%	42.2%	4.6%	1.8%	0.0%
Seniors Care/Housing	50.5%	38.5%	6.4%	3.7%	0.9%
Administrative Services	67.9%	26.6%	3.7%	0.9%	0.9%
Local Governance Representation	68.8%	25.7%	1.8%	2.8%	0.9%

Amalgamation Feasibility Study

APPENDIX 2

The Amalgamation Process

The Amalgamation Process

Amalgamation may be initiated by the Towns in accordance with the following process prescribed by the *Municipal Government Act*:

1. **Notice:** The Towns must give written notice to the Minister and any other affected local authority (e.g. a municipal authority, regional health authority, regional services commission or school board). The notice must include the names of the municipalities to be amalgamated, the reasons for the proposed amalgamation as well as proposals for consultations with the affected local authorities and the public.
2. **Negotiation:** The Towns must enter into direct negotiations and conduct such negotiations in good faith. In addition, the Towns must keep the Minister informed of the progress of the negotiations.
3. **Report:** Upon conclusion of the negotiations, the Towns must prepare a report addressing:
 - a. the matters agreed on and those on which there is no agreement between the municipal authorities,
 - b. a description of the public consultation process involved in the negotiations, and
 - c. a summary of the views expressed during the public consultation processes.

The report must be signed by the Towns.

4. **Application:** The Towns must forward the report to the Minister and all other affected local authorities. If the Towns wish to proceed with the proposed amalgamation, the report constitutes an application for amalgamation.
5. **Amalgamation Principles:** Before an amalgamation is approved, the Minister must consider the principles, standards and criteria on amalgamation established under section 76 of the *Municipal Government Act*:

The amalgamation process is appropriate where two or more municipalities are joined to form a new municipal government unit with a new council and administrative structure that is significantly changed from the pre-existing structures of the affected municipalities.

(a) Amalgamation will be considered if there are demonstrable advantages to the residents of the affected municipalities and if the ongoing financial, political and operational viability of the amalgamated municipality is likely.

Ministerial Order No. L077/01

6. **Public Hearings:** The amalgamation process set out in the MGA does not expressly require a public hearing on an application for amalgamation. However, The Lieutenant Governor in Council (i.e. Cabinet) may refer any matter to the Municipal Government Board ("MGB") for recommendations, including amalgamations (as outlined in MGA Section 488 (1)(e)). In addition, the MGB has jurisdiction to inquire into and make recommendations on any matter referred to it by Cabinet or the Minister. As such, a proposed amalgamation may be referred to the MGB and could result in a public hearing process.

7. Order-in-Council: Cabinet, on the recommendation of the Minister, may by order amalgamate municipal authorities to form a new municipality. The order may:
- a. Dissolve one or more of the councils of the municipal authorities that are amalgamated,
 - b. Provide for an interim council,
 - c. Require a municipality to pay compensation to another municipal authority set out in the order or by means determined in the order, including arbitration under the *Arbitration Act*,
 - d. Describe the boundaries of the municipality formed by the order,
 - e. Give the newly formed municipality the status of municipal district, village, town, city or specialized municipality, and
 - f. Give the municipality an official name.

Amalgamation Feasibility Study

APPENDIX 3

The Annexation Process and Principles

The Annexation Process

Given that the Towns do not share a common municipal boundary, the Towns will be required to concurrently give notice of their intent to annex an area of land within the boundaries of the Municipal District of Foothills No. 31 to create a contiguous border to support the proposed amalgamation. While it is anticipated that the annexation of the lands necessary to form a contiguous border could be achieved through MGA Section 126, which provides for a Ministerial recommendation without an independent annexation report. Under this case, an Amalgamation application would contain information about the proposed annexation, including:

1. Statements of agreement from the property owners.
2. Tax rates of the annexed properties for a set length of time.
3. Compensation (if any) to the M.D. for loss of tax revenue.
4. Statement or resolution of agreement to the annexation from the M.D.

If not included as part of the Amalgamation application specifically, Annexation may be initiated independently by the Towns in accordance with the following process prescribed by the *Municipal Government Act*:

1. **Notice:** The Towns must provide written notice of the proposed annexation to the Municipal District of Foothills No. 31 (the “MD”), the MGB and any other local authority that may be affected. The written notice must include a description of the land to be annexed, the reasons for the proposed annexation, proposals for public consultation and proposals for meeting with the owners of the land to be annexed.
2. **Negotiation and Mediation:** The Towns must enter into direct negotiations with the MD and conduct such negotiations in good faith. If the parties are unable to reach an agreement through their negotiations, the parties must attempt to use mediation to resolve those matters.
3. **Report:** upon conclusion of the negotiations, or mediation if required, the Towns must prepare a report addressing the results of the negotiations, listing the matters both agreed and disagreed on by the parties, describing the public consultation process, and summarizing the views expressed during public consultation. If there were matters on which the participants were unable to agree, the report must describe the use of mediation or reasons why mediation was not used. The report must be signed by all participating municipalities. A municipality which does not sign the report may provide written reasons for not signing the report.
4. **Application:** the Towns must forward the report to the MGB, the MD and all other affected local authorities. If the Towns indicate in the report that they wish to proceed with the proposed annexation, the report constitutes an application for annexation.

(a) MGB Satisfied: If the MGB is satisfied that affected local authorities and the public generally agree on the terms of the proposed annexation, the MGB must initiate the following process:

- i. **Notice:** The MGB must notify the Minister, all affected local authorities, and anyone else that the MGB considers should be notified of the apparent agreement to annexation.
- ii. **No Objections:** Unless an objection to the annexation is filed with the MGB by a specified date, the MGB will make its recommendations to the Minister without holding a public hearing. The MGB will consider the 15 Annexation Principles it developed in MGB Order No. MGB 123/06 in formulating its recommendations.

- iii. Objections: If an objection is filed, the MGB may investigate, analyze and make findings of fact in respect of the proposed annexation, including the probable effect on local authorities and residents of the affected area. The MGB must also conduct one or more public hearings respecting the proposed annexation and allow affected people to appear.
- iv. Report and Recommendations: After holding one or more public hearings and after considering the reports and representations made to it the MGB must prepare a report with recommendations to the Minister. In particular, the report must contain recommendations as to whether the land should be annexed, a description of the land, whether there should be revenue sharing and any other applicable terms, conditions or things the MGB considers necessary to implement the annexation. If the MGB does not recommend that the land be annexed, the MGB must provide a copy of the report to all affected municipalities.

(b) MGB Not Satisfied – Alternatively, if the MGB is not satisfied that the affected municipalities or the public are in general agreement with the annexation proposal, the MGB must initiate the following procedure:

- i. Notice: [same as above]
- ii. Public Hearings: The MGB must conduct one or more public hearings respecting the proposed annexation and allow any affected person to appear. As where an objection is filed, the MGB may investigate, analyze and make findings of fact in respect of the proposed annexation, including the probable effect on local authorities and residents of the affected area.
- iii. Notice of Hearings: The MGB must give notice of the public hearings and has the jurisdiction to determine by and to whom costs of the hearing are to be paid.
- iv. Report and Recommendations: [same as above]

5. Order-in-Council: Cabinet, on reviewing the report of the MGB, may order the land to be annexed from one municipal authority to another. The order may:
- (a) require one municipal authority to pay compensation to another,
 - (b) dissolve a municipal authority as a result of the annexation, and
 - (c) address several ancillary matters such as changing the status of a municipality or the number of members of a municipal council and provide for an interim council,

If the Cabinet does not order the annexation, the Minister must notify the Towns of the refusal. After annexation is refused by the Cabinet, the Towns may not make another annexation proposal concerning the same land for one year.

Although the annexation and amalgamation processes established by the *MGA* are intended to address public concerns while fostering intermunicipal cooperation, the MGB does have the authority to deviate from the annexation or amalgamation agreement proposed by the municipalities and to make alternative recommendations to the Minister. The MGB does not merely approve or “rubber stamp” annexation and amalgamation proposals and agreements. Like municipalities, the MGB has a statutory obligation to ensure that its actions are consistent with the provincial Land Use Policies which, in part, encourage intermunicipal cooperation. In order to ensure that the principles of the *MGA* are satisfied, the MGB will look behind agreements to determine if (in its view) the needs and interests of both the municipalities and public have been addressed and balanced.

As a result, the Towns must ensure that any amalgamation and annexation application addresses the following issues in detail:

- (a) Cooperation: Demonstrate intermunicipal cooperation by detailing the steps taken by the cooperating municipalities to ensure that the annexation and amalgamation application was mutually developed. The interests of urban and rural municipalities should be seen to have been weighed equally.
- (b) Consideration: Demonstrate the consideration given to the interests of all affected parties, including the affected municipalities and the public, with particular attention to the interests of the public and affected landowners.
- (c) Create Solutions: Demonstrate that the concerns of affected parties have not only been noted, but have also been addressed by appropriate solutions.
- (d) Objective Criteria and Rationale: Explain the objective criteria relied upon by the municipalities which forms the foundation of the application. Consider and establish how the Towns' application supports the criteria for amalgamation established by the Minister in Ministerial Order No. L077/01 (described above) as well as the MGB's 15 Annexation Principles.

Annexation Principles

In the absence of criteria authorized by section 76 of the Act and in order to deal with the various issues raised by the affected parties, the landowners and the interest groups, the MGB has developed a series of annexation principles. The MGB has developed these principles from the examination of the annexation provisions in the Act, the Provincial Land Use Policies and previous annexation orders and recommendations. These principles are based on significant annexation decisions prior to 1995 and a total of nearly 170 annexations processed since the introduction of the 1995 Municipal Government Act. In summary, these principles include the following:

1. Annexations that provide for intermunicipal cooperation will be given considerable weight. Cooperative intermunicipal policies in an intermunicipal development plan will be given careful consideration, weight and support so long as they do not conflict with Provincial policies or interests.
2. Accommodation of growth by all municipalities (urban or rural) must be accomplished without encumbering the initiating municipality and the responding municipality's ability to achieve rational growth directions, cost effective utilization of resources, fiscal accountability and the attainment of the purposes of a municipality described in the Act.
3. An annexation or annexation conditions should not infringe on the local autonomy given to municipalities in the Act unless provisions of the Act have been breached or the public interest and individual rights have been unnecessarily impacted.
4. An annexation must be supported by growth projections, availability of lands within current boundaries, consideration of reasonable development densities, accommodation of a variety of land uses and reasonable growth options within each municipality (initiating and responding municipality).

5. An annexation must achieve a logical extension of growth patterns, transportation and infrastructure servicing for the affected municipalities.
6. Each annexation must illustrate a cost effective, efficient and coordinated approach to the administration of services.
7. Annexations that demonstrate sensitivity and respect for key environmental and natural features will be regarded as meeting provincial land use policies.
8. Coordination and cost effective use of resources will be demonstrated when annexations are aligned with and supported by intermunicipal development plans, municipal development plans, economic development plans, transportation and utility servicing plans and other related infrastructure plans.
9. Annexation proposals must fully consider the financial impact on the initiating and responding municipality.
10. Inter-agency consultation, coordination and cooperation is demonstrated when annexations proposals fully consider the impacts on other institutions providing services to the area.
11. Annexation proposals that develop reasonable solutions to impacts on property owners and citizens with certainty and specific time horizons will be given careful consideration and weight.
12. Annexation proposals must be based on effective public consultation both prior to and during any annexation hearing or proceedings.
13. Revenue sharing may be warranted when the annexation proposal involves existing or future special properties that generate substantive and unique costs to the impacted municipality(s) as part of the annexation or as an alternative to annexation.
14. Annexation proposals must not simply be a tax initiative. Each annexation proposal must have consideration of the full scope of costs and revenues related to the affected municipalities. The financial status of the initiating or the responding municipality(s) cannot be affected to such an extent that one or the other is unable to reasonably achieve the purposes of a municipality as outlined in section 3 of the Act. The financial impact should be reasonable and be able to be mitigated through reasonable conditions of annexation.
15. Conditions of annexation must be certain, unambiguous, enforceable and be time specific.

Amalgamation Feasibility Study

APPENDIX 4

Action Prioritization Tool

Sample Approach to Prioritization

Upon working through each of the community objectives and defining a series of actions, it is important for both communities to prioritize their efforts considering the limited resources for implementation and the importance of maintaining momentum through incremental implementation.

As a means to establish a prioritized list of actions, the following guidelines can be used to define priorities for a collective investment:

1. Easily Attainable

- Is this already identified as a shared goal?
- Can this be addressed in a timely manner?
- Is there funding already available?

2. External pressure

- Regional changes
- Senior Government changes

3. Existing community needs

- Is community asking for this (is this an existing issue)?
- Is this issue understood enough to make a decision on direction?

4. Future investment

- Preparedness for future needs – does this support our vision for the future?
- Do we need more information to make a decision?

Upon going through each of the comparative analysis criteria, the following evaluation matrix represents a weighting scale to help establish an objective set of criteria to support the timing of implementing the defined actions. A simple scale of Yes (+1), No (-1), and Maybe (0) can be used to address each of the evaluative criteria. Based on the weighted importance of each criteria (which is subject to change as conditions evolve), an overall score can be assigned to each of the identified actions.

Figure 5: Sample Evaluation Matrix

Criteria	Easily Attainable	External Pressure	Existing Community Needs	Future Investment	Score
Weight	4	2	3	1	
Action 1	Yes (1)	No (-1)	Yes (1)	Maybe (0)	5
Action 2	No (-1)	Yes (1)	No (-1)	Yes (1)	-4

As a specific example, the following outlines an approach to using the criteria and matrix to evaluate the individual action of “Establishing a Joint Land Use Policy”:

1. Easily Attainable

- Is this already identified as a shared goal? – (Yes) both towns have engaged in establishing a Joint Growth Study.
- Can this be addressed in a timely manner? – (Yes) stemming from the Growth Study, the Towns could move to reevaluate their Municipal Development Plans to jointly adopt a single, overall Land Use Policy.
- Is there funding already available? – (Yes) the two municipalities could proceed with a grant to support any external work required through the Alberta Community Partnership, though significant support may not be necessary if the majority of the work could be done in-house.
- **Overall Response – YES – Matrix Score – 4 points**

2. External pressure

- Regional changes – (Yes) there is a shift toward regionalization through the introduction of a Growth Management Board in the Calgary region.
- Senior Government changes – (Yes) the proposed changes to the Municipal Government Act have introduced a greater emphasis on Inter-Municipal Collaboration and access to funding will be increasingly based on regional approaches.
- **Overall Response – YES – Matrix Score – 2 points**

3. Existing community needs

- Is community asking for this (is this an existing issue)? – (Maybe) while the engagement sessions did not express a specific push for Joint Land Use Policy, it was acknowledged (as well as in the process to create the Joint Growth Study), that it is important for the two communities to “grow together”.
- Is this issue understood enough to make a decision on direction? (Yes) given the direction from the Joint Growth Study and a collective desire to move toward the strategic objectives identified in this Study, it appears clear that the communities should move to a more unified approach to land use planning.
- **Overall Response – YES – Matrix Score – 3 points**

4. Future investment

- Preparedness for future needs – does this support our vision for the future? – (Yes) the desire to grow and establish “Diamond Valley” as a unified region (regardless of municipal structure), presents the need to have a joint approach to land use planning.
- Do we need more information to make a decision? - (No) upon confirmation of future direction stemming from this initiative, the municipalities will be well positioned to establish short-term priorities and this fits well with other ongoing efforts the Towns have been collaborating on.
- **Overall Response – YES – Matrix Score – 1 points**

- **Overall Score: 10 points – High Priority**

APPENDIX 8

Negotiation Charter



AMALGAMATION NEGOTIATIONS

JOINT FRIENDSHIP AGREEMENT COMMITTEE

Negotiation Charter



Negotiation Charter Purpose:

The intent of the Project Charter is to establish clear strategic project direction for all partners and team members. As such, it includes:

- Shared Vision, Guiding Principles, and Shared Objectives
- Design Negotiation and Facilitation Alliance
- Plan Scope
- Outcomes and Success Factors
- Roles and Communications Expectations
- Decision-making Model
- Risks and Mitigations
- Key deliverables, milestones, and schedule

Vision, Principles, and Objectives:

Shared Vision:

- We align our strengths to serve a community that is bound together by a strong sense of belonging.

Guiding Principles:

- Balancing service levels with long term cost.
- Joint decision making that is effective and adaptive and based on honesty and integrity.
- Developing and implementing policies that are fact based, action focused, and achievable within a realistic and feasible timeframe.

Shared Objectives:

- Diversified and Resilient Economy: shared investment in strengthening the local economy.
- Integrated Policy Framework: aligning policies with shared growth objectives.
- Sustainable Service Delivery: more effective and efficient delivery of municipal services.
- Expanding Community Capacity: shared commitment to ongoing engagement with citizens.
- Responsive Local Governance: long-term and prioritized land and infrastructure planning.



AMALGAMATION NEGOTIATIONS

JOINT FRIENDSHIP AGREEMENT COMMITTEE

Negotiation Charter



Design Negotiation and Facilitation Alliances:

The commitments here represent how the Committee wants to work together on the negotiations.

The Committee members will be:

- Timely
- Professional
- Respect
- Honest
- Thorough
- Open
- Friendly
- Focused
- Positive
- Think about the region – the greater good
- Creative
- Listen
- Calling out w/ not agreed
- Not personal
- Agree to disagree
 - Respect
 - Calmly
 - Acknowledge a view point
 - Gestures
- Resident focused: know why and what is a priority
- Sleep on difficult issues and revisit
- Conflict is healthy when handled with trust

The facilitators will:

- Prepare agenda ahead of time
- Use experience to keep us on track
- One at a time facilitation
- Open
- Don't pick a side
- Ask the right questions
- Keep a quick pace
- Suggest redirection when an impasse happens
- Control the focus

Plan Scope:

In Scope:

Mandated Topics:

1. Name
2. Municipal Boundaries
3. Municipal Status
4. Electoral Wards
5. Council Representation
6. Municipal Office location
7. Proposed incorporation date
8. Annexation of land to achieve contiguous boundary
9. Other matters (assessment and taxation, property, employees)

Transitional Topics:

10. Interim Council
11. Interim CAO

12. First Election
13. 2021 General Election
14. Returning Officer
15. Ward Boundary review
16. Compensation to other municipal authorities
17. Financial transition
18. Interim Tax Treatment
19. Tax Treatment (previous annexations)
20. Authority to Impose Additional Tax (to service pre-amalgamation debt)
21. Assessment
22. Employees and labour agreements
23. Bylaws and Resolutions of Existing Munis
24. Emergency services



AMALGAMATION NEGOTIATIONS

JOINT FRIENDSHIP AGREEMENT COMMITTEE

Negotiation Charter



- 25. Library services
- 26. Consultation
- 27. Utilities: assessment of utility rate differences and how they should be handled

- 28. Westend Regional Sewage Services Commission
- 29. ICF Extension

Out of Scope:

- Conduct a plebiscite: for a range of reasons including, but not limited to: amalgamation has been an ongoing process with community engagement; some elected officials ran for election on amalgamation; plebiscites take complex decisions and reduce them to one question without enough insight on what drives the decision-making

Outcomes and Success Factors

The Amalgamation Negotiations will be considered successful when:

- JFAC decides whether amalgamation is in the best interests of the communities based on a robust set of available information highlighting the risks, opportunities, and public feedback, and
- the committee members and public know why the decision was made.

Roles and Communications Expectations

- The Joint Friendship Agreement Committee will be responsible for:
 - Final decision-making on the amalgamation application
 - Providing feedback to sub-committee as appropriate
 - Monitoring progress across sub-committees
- The Joint Friendship Agreement Committee Chairs, Mayor Barry Crane and Mayor Ruth Goodwin, will attend to all media requests, and are responsible for working with Administration and the Consultant Team to ensure coordination between meetings, as necessary.
- The subcommittees will be responsible for:
 - Fulfilling all aspects of their respective Terms of Reference
 - Scoping the technical requirements of the negotiations
 - Ensuring data requests are provided to Administration
 - Form recommendations on all topics assigned to the subcommittee in a timely manner that corresponds with the Negotiation Charter schedule
- The CAOs are the primary point of contact for administrative aspects of the negotiations, data collection, and communications with the Consultant Team.
- The Consultant Team: Maven will be responsible for:
 - Acting as a project manager role for the whole negotiation efforts
 - Facilitating committee and sub-committee meetings including consolidating materials from the CAOs/Technical Committee in advance of meetings



AMALGAMATION NEGOTIATIONS

JOINT FRIENDSHIP AGREEMENT COMMITTEE

Negotiation Charter



- Strategizing and planning for consultations and public communications
 - Working with the CAOs/Technical Committee to implement all aspects of the negotiation efforts
- Councils: All Council members have responsibility for reviewing the negotiation application package and determining final decision-making.

Decision-Making Model

- Joint Friendship Agreement Committee
 - Meetings shall be facilitated by the Consultant Team.
 - Formal decision-making occurs in open session with an 80% majority vote.
 - Exploratory discussions and informal topic recommendations occur in-camera sessions. Decision-making to trigger the end of an in-camera session will occur by consensus minus 2.
 - Consensus model will be the primary decision-making method for in-camera sessions.
 - Secondary option: Where full consensus cannot be reached within the established negotiation timeline, a unanimous minus 2 system will be used.
 - Collaborative discussions are the intent – focus is on the amalgamation negotiations as mutually beneficial overall.
 - Consensus does not mean unanimous agreement on every topic. Consensus does mean that the parties agree that they can live with the decisions and support the implementation even if they aren't fully in support of some elements.
- Subcommittees
 - Meetings shall be facilitated by the Consultant Team.
 - All subcommittee meetings are confidential because they are the forum for exploratory discussions and informal topic recommendations.
 - Recommendation-making will use consensus as the primary decision-making method.
 - Secondary option: Where full consensus cannot be reached within the established negotiation timeline, a unanimous minus # system will be used. The specific number is set in each subcommittee's terms of reference.
 - The subcommittees make recommendations to the Joint Friendship Agreement Committee.
 - Collaborative discussions are the intent – focus is on the amalgamation negotiations as mutually beneficial overall.
 - Consensus does not mean unanimous agreement on every topic. Consensus does mean that the parties agree that they can live with the decisions and support the implementation even if they aren't fully in support of some elements.

Project Risks and Mitigations

Every project has risks to be aware of, and options to reduce that risk from detrimentally impacting the project. The Chartering process includes considering risks at the beginning of the project so that the project team can adapt the project as needed. The intent is not that the consideration of risks ends with the Charter, but rather risks are identified throughout the project and addressed in an appropriate manner and timeline.

Key risks identified:

- Misinformation in the community:
 - In intermunicipal projects, it is easy for misinformation to spread if information is not carefully crafted and timed for release.

Mitigations:

- *Craft strong key messages that act as a touch stone for all communications.*
- *Share factual info mindfully and in a timely manner with distribution of the information completed in tandem.*
- *Ensure all communication is strong with clear messaging.*

- Lack of public understanding:
 - Amalgamation negotiations are not a common process and it is to be expected that the public may not understand what will happen.
 - Past amalgamation experience may influence the public's understanding of this process.

Mitigations:

- *Be clear on where the negotiation process is at and what is happening on a regular basis.*
- *Build trust with community.*
- *Balance discussions that are in and out of camera.*
- *Be careful on meeting advertising – open/closed, publish agenda, follow it.*
- *Do what we say we will do.*

- Lack of data:
 - The negotiations will be dependent upon currently available data. The negotiation timeline does not allow for new data collection or significant analysis (i.e., requiring outside consultant support).

Mitigation:

- *Staff will be working to support the negotiation decisions by collecting available data and should bring forward any concerns about gaps.*

AMALGAMATION NEGOTIATIONS

JOINT FRIENDSHIP AGREEMENT COMMITTEE

Negotiation Charter



- Timeline and Staff Capacity:
 - There are many competing priorities for limited Councillor and staff time. The project timeline is reasonable, but short. This limits review time for deliverables.
 - Scheduling meetings with committee members can be challenging because of the number of partners involved.
 - Staff capacity limitations and turnover would significantly impact the project because much of the data collection for negotiations and communications implementation will require direct staff involvement.
 - CAO capacity will be critical to ensuring all aspects of this multi-pronged project are consistent.

Mitigations:

- *It will be required that all participants work toward timelines even when challenging.*
- *Meeting schedules will be set based on each subcommittee's expectations to ensure availability.*
- *Flexibility is requested for scheduling JFAC and subcommittee meetings to meet the project deadlines.*
- *Staff alternates should be identified and available to step in if required.*
- *Meetings should enable opportunities for any real time updates in the project's progress and not be held back by review periods.*
- *Bi-weekly meetings with the CAOs have been scheduled to ensure adequate discussion opportunity. Availability by email will be required on a regular basis.*
- *Project Managers will provide regular project updates to JFAC.*
- *Develop a culture of true collaboration. The project will be successful if we work as a team and provide support and constructive criticism.*

- Project Scope:
 - Because amalgamations are not common, there are few examples of process to follow. For some participants, not having examples to draw upon results in exploring significant what ifs. Balancing key questions and the project timeline will be necessary.
 - Negotiations can uncover new requirements for data/information and further dialogue that may result in changes to the project scope.

Mitigations:

- Creating a clear list of in-scope items for each sub-committee will assist with project focus.
- Regular updates with JFAC will enable larger discussions to come from the subcommittees to JFAC as necessary, while empowering the sub-committees to make recommendations on topics within their scope.



AMALGAMATION NEGOTIATIONS

JOINT FRIENDSHIP AGREEMENT COMMITTEE

Negotiation Charter



- Lack of clarity on roles and responsibilities:
 - With large projects involving many partners (Councillors, CAOs, staff, subject matter experts, and consultants) role confusion can impact the timeline and budget when not clear.

Mitigations:

- Ensure all parties and individuals understand how and when to contribute/participate and also importantly, when to step aside.
- Provide clear opportunities for when and how to raise issues/concerns.
- Build trust in everyone's role to facilitate effective collaboration.

Key Deliverables

The final deliverable is the negotiation report which acts as the application to the Minister. The report will include:

- The negotiation results on all matters (both supportive & not);
- A summary of the public consultation process;
- A summary of the public consultation input; and
- A certificate by the municipalities confirming the accuracy of the report.

Key Milestones and Schedule

See Appendix: Detailed Negotiation Schedule

APPENDIX 9

JFAC Motions Passed on Negotiation Topics

JFAC Motions Passed on Negotiation Topics

1. Name

Motion: That JFAC propose the name 'Town of Diamond Valley' as the name of the amalgamated municipality in the amalgamation negotiation report to the province pending confirmation of the legal use of the name.

2. Municipal Boundaries

Motion: That the Joint Friendship Committee agrees to the municipal boundaries as per the land descriptions with the current boundaries of both Towns and further directs administration to provide the legal descriptions to the consultant to include in the report to the Minister.

3. Municipal Status

Motion: That the Joint Friendship Committee agrees to the municipal status of Town.

4. Electoral Wards

Motion: That JFAC recommend under Topic #4 in the amalgamation report to the province that an 'at large' electoral representation be the preferred format for the 2022 Q4 election as opposed to dividing the new municipality into electoral wards.

5. Council Representation

Motion: That the Joint Friendship Agreement Committee agree to seven (7) elected officials to represent the newly formed municipality upon its incorporation.

6. Municipal Office Location

Motion: That the Joint Friendship Agreement committee agree that the main municipal office will be located in Black Diamond, 301 Centre Avenue West.

7. Proposed Incorporation Date

Motion: That the Joint Friendship Agreement committee agrees to an incorporation date of the new municipality as January 1, 2023.

8. Annexation of Land to Achieve Contiguous Boundary

There is currently a contiguous border and so no further changes are required.

9. Other Matters

10. Interim Council

Motion: That JFAC agrees to support, should the amalgamation application proceed with first election in Q4 2022, no interim council will be required.

11. Interim CAO

Motion: That JFAC agree to recommend the current CAO of Turner Valley, Shawn Patience, be named in the Amalgamation Negotiation Report as Interim CAO.

MOTIONS ON NEGOTIATION TOPICS AS PASSED BY JFAC

Motion: That JFAC agree to recommend the current CAO of Black Diamond Sharlene Brown be named in the Amalgamation Negotiation Report as a secondary option for Interim CAO.

12. First Election

Motion: That JFAC agree to recommend that a Q4 election date of November 28, 2022 for a new Council of the amalgamated Town and that this is the preferred option to be included in the ministerial order.

Motion: That JFAC agree to strongly support the resolution for the Q4 election of 2022 in the Report on Amalgamation as a reduction of one Council is part of the cost saving measures and operating efficiency supporting the amalgamation process.

Motion: That JFAC agree to provide an alternative recommendation in the Negotiation Report inclusive of a fourteen (14) member Council comprised of the council elected in October 2021, with a Mayor being appointed from those fourteen (14) sitting Council members (MGA 150) for a period of 90-120 days after incorporation.

13. 2021 General Election

Motion: That the Joint Friendship Agreement committee agrees to continue with the current timeline, culminating in amalgamation in January 2023 as presented as Scenario 3 in the letter of response dated November 5, 2020, from the Minister of Municipal Affairs, Tracy L. Allard and directs administration to inform Minister Allard of the committee's decision.

14. Returning Officer

Motion: That the Joint Friendship Agreement Committee agree to recommend in the amalgamation application report that the current Returning Officer of Black Diamond, Verna Staples will act as the Returning Officer for the Q4 2022 election of council for the newly amalgamated municipality.

15. Ward Boundary Review

Motion: That JFAC recommend under Topic #15 in the amalgamation report to the province that a ward boundary review will not be required due to the determination to hold an 'at large' election in Q4 2022 as a result of the public consultation.

16. Compensation to other municipal authorities

Motion: That JFAC include under Topic 16 in the amalgamation negotiation report that the amalgamated municipality would be required to pay Foothills County \$32,154/year until 2024 (for previous contractual agreements which include annexation agreements, and municipal road maintenance agreement) after which time the payment would be reduced to \$10,000/year with the last payment made in 2030.

17. Financial Transition

Motion: That JFAC include under Topic #17 in the amalgamation report to the province that independent audits be conducted for Black Diamond and Turner Valley for the year ending December 31, 2022, and further that an audit will be conducted for the newly created town as at December 31, 2023.

18. Interim Tax Treatment

Motion: That JFAC include under Topic #18 in the amalgamation negotiation report to the province that no interim tax treatment is required since incorporation date would be Jan. 1, 2023.

19. Tax Treatment (previous annexations)

Motion: That JFAC include under Topic #19 in the amalgamation negotiation report that for the lands annexed by Black Diamond to unify a boundary between Black Diamond and Turner Valley, for the purposes of taxation in 2020 and in each subsequent year up to and including 2044, these lands must be assessed as if in the County of Foothills and taxed as if in the County of Foothills, until a triggering event noted in the agreement.

20. Authority to Impose Additional Tax (to service pre-amalgamation debt)

Motion: That JFAC include under Topic #20 in the amalgamation negotiation report that the Local Improvement levies remain with the Town of Turner Valley properties until such time as they are paid in full.

Motion: That JFAC include under Topic #20 in the amalgamation negotiation report that operating revenues continue to support the existing debts of both municipalities before and after amalgamation.

Motion: That JFAC include under Topic #20 in the amalgamation negotiation report that designated capital reserves remain in the individual municipalities until they are utilized. All existing undesignated capital reserves should be designated to restricted dedicated reserves contained within their 10-year capital plans prior to incorporation date. Operating reserves should be contributed toequally based on Black Diamond and Turner Valley's requirements with the remainder to be designated to capital reserves.

Motion: That JFAC include under Topic #20 in the amalgamation negotiation report that the ten-year capital plan be utilized as the indicator of the infrastructure condition and costs to upgrade. For the ten-year capital plan Turner Valley has \$28.4M planned and Black Diamond has \$38.4M planned. This will assist with addressing the infrastructure variations between the two towns by comparing priorities in each municipality.

21. Assessment

Motion: That JFAC include under Topic #21 in the amalgamation negotiation report that there is no need to treat property assessments differently since the incorporation date would be Jan. 1, 2023.

22. Employees and Labour Agreements

Motion: That the Joint Friendship Agreement Committee agree to include in the amalgamation application report that all employees at the time of amalgamation will become employees of the new municipality to ensure uninterrupted service delivery until such time as the CAO, in conjunction with the Council elected in 2022, have determined service levels and organizational structure.

23. Bylaws and Resolutions of Existing Munis

MOTIONS ON NEGOTIATION TOPICS AS PASSED BY JFAC

Motion: That JFAC agree to support the deferring the updates of bylaws and resolutions to post-amalgamation.

Motion: That JFAC agree to direct administration to inventory bylaws and resolutions to determine priorities for alignment in the pre-amalgamation timeframe and further the timeline for this task will be dependent on administration capacity but is expected to be complete by September 2021.

24. Emergency Services

Motion: That the Joint Friendship Agreement Committee agree to include in the amalgamation application report that the level of service will be maintained for three branches of Emergency Services which includes Fire, Emergency Management and Community Peace Officers in both Black Diamond and Turner Valley until incorporation date and maintain service levels until such time as the new CAO and the new Council determines the service levels and organizational structure.

25. Library Services

Motion: That JFAC recommend the continuation of library services after the date of incorporation of the new municipality.

26. Consultation

27. Utilities: Assessment of utility rate differences and how they should be handled

Motion: That JFAC include under Topic #27 in the amalgamation negotiation report that the current utility rates for each municipality be continued until such time as a new utility rate bylaw is established.

28. Westend Regional Sewage Services Commission

Motion: That JFAC request Westend Regional Sewage Services Commission establish a bylaw as per MGA S609.09(1) and provide the bylaw for inclusion into the Negotiation Report.

Motion: That JFAC request Westend Regional Sewage Services Commission provide recommendations for the disestablishment date - upon incorporation or extension timeframe of the commission.

29. ICF Extension

Motion: That JFAC agrees to support included in the proposed amalgamation application a confirmation that the ICF deadline has been previously extended until April 1, 2022, and if the amalgamation application is submitted, the Towns will request an adjusted deadline for an ICF between the new municipality and Foothills County.

APPENDIX 10

JFAC Reports

- a. March 10, 2021: Procedure Subcommittee Report
- b. May 12, 2021: Emergency Services Subcommittee Report
- c. May 12, 2021: Procedure Subcommittee Report
- d. June 23, 2021: Procedure Subcommittee Report
- e. June 23, 2021: Finance Subcommittee Report:
 - Information as presented on June 23, 2021.
Amendments to the content were made at JFAC's direction and included in the Finance Report to Public.
- f. June 23, 2021: Public/Stakeholder Consultation Subcommittee Report: Electoral Wards
- g. June 23, 2021: Public/Stakeholder Consultation Subcommittee Report: Naming

APPENDIX 10a



AMALGAMATION NEGOTIATIONS JOINT FRIENDSHIP AGREEMENT COMMITTEE REQUEST FOR DECISION



DATE OF MEETING:	March 10, 2021
SUBJECT/TOPIC:	Procedure Subcommittee Recommendations
PURPOSE:	To provide recommendations from the Procedure Subcommittee to Joint Friendship Agreement Committee (JFAC). The JFAC will make the decision whether these recommendations are included in the amalgamation application, should it proceed.
PREPARED BY:	On behalf of the Procedure Subcommittee: <ul style="list-style-type: none">• Sharlene Brown, CAO Town of Black Diamond• Heather Thomson, Acting CAO Town of Turner Valley
ATTACHMENTS:	None
BACKGROUND/HISTORY:	This report addresses four of the nine scoped Procedure Subcommittee topics. The recommendations are brought forward with full consensus of the subcommittee members.
REPORT SCOPE:	The Amalgamation Procedure Subcommittee has recommendations for four topics: <ol style="list-style-type: none">1. Bylaws and Resolutions of Existing Municipalities2. First Election3. Interim Council4. ICF Extension

FINDINGS:

1. Bylaws and Resolutions of Existing Municipalities:

A. Proposed Resolution Options:

1. Defer the update of bylaws and resolutions to post-amalgamation, or
2. Provide direction to initiate a comprehensive review and alignment process for all bylaws and resolutions if the amalgamation application proceeds.

B. Procedure Subcommittee Recommendation:

The Procedure Subcommittee recommends that:

1. the JFAC support deferring the update of bylaws and resolutions to post-amalgamation, and
2. JFAC direct administration to inventory bylaws and resolutions to determine priorities for alignment in the pre-amalgamation timeframe. The timeline for this task is dependent on administrative capacity, but is expected to be complete by September 2021.

C. Rationale:

All bylaws and resolutions of the existing municipalities continue to be in effect for the amalgamated municipality until the new municipality's council repeals or replaces the bylaws. The Towns of Black Diamond and Turner Valley have worked in collaboration for many years, and that is reflected in many of the bylaws and resolutions being similar already.

D. Resource / Finance Impacts:

Administration resources will be required to inventory bylaws and resolutions to determine priorities. This work will be accomplished within the existing budget at a time when capacity is available, and is anticipated to be complete by September 2021.

E. Public Participation / Communication:

Public participation at an inform level will occur with this recommendation. The recommendation will be included in the Public Information Paper and associated communications.

2. First Election

A. Proposed Resolution Options:

1. The proposed amalgamation application will recommend that

the first election for the amalgamated municipality should occur in Q4 2022.

2. The proposed amalgamation application will recommend that the first election for the amalgamated municipality should occur post-amalgamation in Q1 2023.

B. Procedure Subcommittee Recommendation:

The Procedure Subcommittee recommends that:

1. the JFAC support that the proposed amalgamation application will recommend that the first election for the amalgamated municipality should occur in Q4 2022.

C. Rationale:

Should the amalgamation application proceed, it is expected to be provided to Alberta Municipal Affairs by early September 2021. The anticipated Order in Council would be completed between 6-9 months afterwards at approximately March to June, 2022. With this timeframe, there is enough time in the fall of 2022 to hold an election prior to amalgamation. The governance will officially come into effect on January 1, 2023.

D. Resource / Finance Impacts:

There is no financial difference between the options. Both will incur approximately \$5,000 cost to hold an election. Additional costs may include staffing including Returning Officer wages or applicable OT, orientations, and technology support. An additional election is necessary because the next general municipal election will not occur until 2025.

E. Public Participation / Communication:

Public participation at an inform level will occur with this recommendation. The recommendation will be included in the Public Information Paper and associated communications.

3. Interim Council

A. Proposed Resolution Options:

1. Should the amalgamation application proceed with a first election in Q4 of 2022, no interim council will be required.
2. No other options are available.

B. Procedure Subcommittee Recommendation:

The Procedure Subcommittee recommends that:

1. the JFAC support that no interim council will be required.

C. Rationale:

The Interim Council is defined as the interim council members who would serve for the time period between the incorporation date and the next general municipal election (or by-election). With the recommendation of a first election held prior to the incorporation date, interim governance is not required. It is expected that there will be an election held in Q4 of 2022 with the date of governance starting on the date of incorporation.

D. Resource / Finance Impacts:

There is no resource or financial impact to this recommendation.

E. Public Participation / Communication:

Public participation at an inform level will occur with this recommendation. The recommendation will be included in the Public Information Paper and associated communications.

4. Intermunicipal Collaboration Framework (ICF) Extension

A. Proposed Resolution Options:

1. The proposed amalgamation application should include a confirmation that the ICF deadline has been previously extended until April 1, 2022. If the amalgamation application is submitted, the Towns will request an adjusted deadline for an ICF between the new municipality and Foothills County.
2. No other options are available.

B. Procedure Subcommittee Recommendation:

The Procedure Subcommittee recommends that:

1. the JFAC support included in the proposed amalgamation application a confirmation that the ICF deadline has been previously extended until April 1, 2022. If the amalgamation application is submitted, the Towns will request an adjusted deadline for an ICF between the new municipality and Foothills County.

C. Rationale:

The current ICF requirement includes either two ICFs (between Foothills County and Turner Valley; and Foothills County and Black Diamond), or one multilateral ICF. If the amalgamation application proceeds, it would be more efficient to create one ICF between Foothills County and the new municipality. The adjusted timeline will be necessary to have sufficient

time for the negotiations after the amalgamation negotiations are complete.

D. Resource / Finance Impacts:

There is no resource or financial impact to this recommendation.

E. Public Participation / Communication:

Public participation at an inform level will occur with this recommendation. The recommendation will be included in the Public Information Paper and associated communications.



EMERGENCY SERVICES SUB-COMMITTEE REPORT

DATE OF MEETING: May 12, 2021

SUBJECT/TOPIC: Amalgamation Transitional Matters

PURPOSE: To provide information requested by the Committee regarding the topics outlined in the report scope.

BACKGROUND/HISTORY: The Emergency Services Committee, encompassing the Black Diamond and Turner Valley Fire Departments, Emergency Management Directors and Municipal Enforcement Departments discussed current and post-amalgamation priorities and required decisions including organizational structures and service levels.

REPORT SCOPE: The scope of this report is to provide the information to be considered for the Amalgamation report/application. The following topics are considered transitional matters for consideration to be included in the report.

1. Continuation of Emergency Services

1. TOPIC: Amalgamation Requirements Group 2: Transitional Matters

—

24. Continuation of Emergency Services

By default, the MGA states that all existing staff and all existing bylaws and resolutions of existing municipalities will carry over to the new municipality. This also includes the emergency management bylaws and plans, and the appointment of the directors of emergency management required by the Emergency Management Act. If consolidation of the emergency management roles and responsibilities and plans are required to simplify implementation after amalgamation, then we can address them as part of the amalgamation order.

FINDINGS:

1. Service Level: The current level of service is be maintained until incorporation. By default, the MGA states that all existing staff and all existing bylaws and resolutions of existing municipalities will carry over to the new municipality. This also includes the emergency management bylaws and plans, and the appointment of the directors of emergency management required by the [Emergency Management Act](#)
2. Consolidation of emergency management roles and responsibilities: If consolidation of the emergency management roles, responsibilities and plans is deemed to simplify implementation of a new combined structure, this can be addressed as part of the Organizational Structure Review
3. The three branches of Emergency Services, including Fire, Emergency Management and CPO's, have provided reports and updates related to current state along with future challenges and opportunities, including items for consideration pre and post amalgamation that shall be considered when and if the Order in Council is approved or as part of future planning by both municipalities.

STAFF RECOMMENDATION:

1. The current level of service be maintained until incorporation.



PROCEDURE SUB-COMMITTEE REPORT

DATE OF MEETING:	May 12, 2021
SUBJECT/TOPIC:	Amalgamation Transitional Matters
PURPOSE:	To provide information requested by the Committee regarding the topics outlined in the report scope.
BACKGROUND/HISTORY:	Through the amalgamation process the municipalities must discuss the proposals included in the notice to amalgamate sent to the Minister and negotiate the proposals in good faith. Upon conclusion of the negotiations, the amalgamating municipalities must prepare a report to the Minister that describes the results of the negotiations which will include topics considered transitional.
REPORT SCOPE:	<p>The scope of this report is to provide the information to be considered for the Amalgamation report/application.</p> <p>The following topics are considered transitional matters for consideration to be included in the report.</p> <ol style="list-style-type: none">1. Interim CAO2. Returning Officer3. Labour and Human resources4. Library

1. TOPIC: Amalgamation Requirements Group 2: Transitional Matters - 11. Interim Chief Administrative Officer *This item is still being worked on by the procedure committee.*

The name of the interim chief administrative officer that will be appointed by the Minister to administer the amalgamated municipality until the council of the amalgamated municipality chooses another chief administrative officer using their established processes. The interim chief administrative officer will likely be the lead/manager responsible for running the municipality and for the consolidation and/or transition of the county, town(s), and village(s) into the amalgamated municipality in accordance with council's direction.

FINDINGS:

We have been advised by our Municipal Affairs Advisor; Linda Reynolds, that the legislative drafters will need to know whom the towns recommend as CAO at the time the Order in Council (OC) is being drafted. Further, if the Interim CAO is not named in the report/application to amalgamate, that it would be considered a gap in information; however, the application would still be considered. The municipalities would be asked to put forward the name of an Interim CAO when the OC drafting commences if not before. The Interim CAO is appointed based on the recommendation from the amalgamating municipalities (JFAC)

STAFF RECOMMENDATION:

JFAC members consider the following three options:

Option 1: JFAC members agree to name an Interim CAO and that name be provided in report/application to amalgamate, the recommendation should include an anticipated start date of the Interim CAO, being a minimum of 6 months (or sooner if the OC is approved sooner) prior to incorporation.

Option 2: JFAC members agree to not include the name of an Interim CAO in the report/application, but agree to provide the name when the Order in Council drafting commences, if not before.

Option 3: Provide reasons why name is not included in report/application.

2. TOPIC: Amalgamation Requirements Group 2: Transitional Matters - 14. Appointment of Returning Officer(s)

Since the timing of the proposed amalgamation will be close to the nomination day and election day, the name of a returning officer(s) may be required. If that is the case, the names of the returning officer(s) will be required.

FINDINGS:

As the approved recommendation is to hold an election in Q4 2022 prior to the 2023 incorporation date there are several matters that must be considered including:

- Election Date
- Nomination Day
- Any bylaw or resolutions that may have to be passed prior to the election including the appointment of Returning Officer(s)

STAFF RECOMMENDATION:

Option 1: JFAC members consider including the names of one or the other current Returning Officer(s) be Verna Staples as the Returning Officers for the Q4 2022 election of council for the newly amalgamated community in the report/application to amalgamate.

3. TOPIC: Amalgamation Requirements Group 2: Transitional Matters - 22. Labour and Human Agreements

By default, all employees of the pre-amalgamated municipality will become employees of the new municipality. The MGA provides the ability for the Lieutenant Governor in Council (Cabinet) to deal with employees of the pre-amalgamated municipalities as part of the amalgamation (if required). This may address issues such as how employees are integrated into the amalgamated municipality, the consolidation of bargaining units and labour (union) agreements, severance, transitional staffing, and any other issues that need to be addressed.

FINDINGS:

Several matters will need to be considered regarding labour and human resources when developing plan to move forward with the amalgamation of two communities. These matters include:

- Aligning and redefining the compensation grids.

- Alignment of benefits and insurance programs.
- Consider seniority, competency, education, and experience of staff.
- Employee retention processes and attrition opportunities.
- Consider financial liabilities including accrued vacation, sick time, and banked overtime.
- Consider severance programs for those not continuing with new municipality.
- Management of STD, LTD and WCB claims at the time of amalgamation.
- Alignment or Creation of new HR policies and
- Job description review and redefining.
- New organization chart establishment.
- Determine possible human resource legal issues.
- Establishing the new organizational culture.
- Determination of service level requirements for amalgamated municipality
- Determination of any new staff requirements

STAFF RECOMMENDATIONS

A. All existing staff members to maintain current positions to ensure uninterrupted service delivery until such time as the interim CAO and, in conjunction with the Council elected in 2022, have determined a path forward based on the outcome of item A. above.

4. TOPIC: Amalgamation Requirements- 25. Library Services (Intermunicipal Sheep River Library) This item is still being worked on through the procedure committee

By default, the Libraries Act states that when an amalgamation of municipal authorities has been initiated under the MGA and no agreement can be reached among those municipal authorities regarding the rights, assets and liabilities of a municipal library board, the Lieutenant Governor in Council may, by order, dissolve the municipal library board and may make any order the Lieutenant Governor in Council considers appropriate in respect of the disposition of the rights, assets, and liabilities of the municipal library board. Ideally, an agreement would be in place to address the future of the municipal libraries and this should be included with the amalgamation.

Application

FINDINGS

Upon discussions with Public Library Services Branch (PLSB) advisor the following information has been provided regarding dissolution of the Intermunicipal Sheep River Library Board (SRLB)

STEPS TO MOVE FROM INTERMUNICIPAL BOARD TO SINGLE ENTITY

1. Establishment of New Board

The application will need to include a request to the Minister to dissolve the Intermunicipal Sheep River Library Board.

In order to not disrupt library services a new bylaw will need to be developed for the single board. The Intermunicipal Bylaws will need to be rescinded, and the new municipality will need to develop a new bylaw to establish the single board.

The Libraries Act clearly outlines what is required for membership of the municipal library board it stipulates that between 5 and 10 board members can be appointed to a municipal library board, of which not more than 2 members can be councillors from the establishing municipality. Terms cannot exceed 3 years (board members can be reappointed for 2 additional terms. The new council can choose to simply appoint the current board members of the Sheep River Library Board to the new board, or appoint new members all together. That will be their prerogative. Staff, however, belong to the library board.

Once the Sheep River Library Board is dissolved, the staff will not have an employer. Hence, plans should be in place to transfer these employees under the employment of the new board. However, although highly unlikely, the new library board does have the ability to hire entirely new staff if they wish, as it is an entirely new corporation.

The PLSB advisor advised they will provide confirmation regarding if the new SRLB will become a “ghost board”, meaning it hasn’t legally been dissolved but is no longer functioning until new bylaw is approved by the newly elected council upon incorporation. (i.e. incorporation date January 1, 2023 the bylaw would come forward to receive all three readings at the first regular business meeting). This will ensure continuation of library services through the transition period.

2. Assets and Liabilities of the SRLB

In the case of a municipal dissolution, these are typically transferred to the new board prior to the old board dissolving however, since this is an amalgamation and the new board won't exist yet, there lies a gap that PLSB is further exploring and will advise as soon as this information is available, see note above regarding "ghost board".

3. Marigold

If the new municipality wishes to continue to receive Marigold library system service, a new system agreement will need to be completed, and a member of the SRLB appointed as representative to Marigold.

Under section 27 of the Libraries Regulation, the library board must first pass a motion agreeing to accept services from Marigold library system. Council will then need to pass a resolution agreeing to accept system services. Both parties then sign the system agreement. Following this, the municipality will apply to the Minister to join the system (the board resolution, council resolution, and signed system agreement must accompany this request). This may leave a bit of a gap in services provided by Marigold, as the municipality, board, meetings to pass the resolutions, and application to the Minister could take some time. Closer to the time, the Library Board may wish to talk to Marigold about some potential work-around to fill this gap in the interim.

4. Lease Agreement

A new lease agreement will need to be developed with the Library Board and the new municipality. This also can be completed pre-amalgamation and be ready upon incorporation.

PLSB advisor has recommended a new SRLB schedule of Assets be developed to attached to the new lease agreement.



PROCEDURE SUB-COMMITTEE REPORT



DATE OF MEETING: June 08, 2021
For Presentation to JFAC June 23, 2021

SUBJECT/TOPIC: Amalgamation Transitional Matters

PURPOSE: To provide information requested by the Committee regarding the topics outlined in the report scope.

BACKGROUND/HISTORY: Through the amalgamation process the municipalities must discuss the proposals included in the notice to amalgamate sent to the Minister and negotiate the proposals in good faith. Upon conclusion of the negotiations, the amalgamating municipalities must prepare a report to the Minister that describes the results of the negotiations which will include topics considered transitional.

REPORT SCOPE: The scope of this report is to provide the information to be considered for the Amalgamation report/application.

The following topics are considered transitional matters for consideration to be included in the report.

1. Interim CAO
2. First Election - amendment
3. Library

1. **TOPIC: Transitional Matters - #11 Interim Chief Administrative Officer**

“The name of the interim chief administrative officer that will be appointed by the Minister to administer the amalgamated municipality until the council of the amalgamated municipality chooses another chief administrative officer using their established processes. The interim chief administrative officer will likely be the lead/manager responsible for running the municipality and for the consolidation and/or transition of the county, town(s), and village(s) into the amalgamated municipality in accordance with council’s direction.”

FINDINGS:

MGA section 112

When a municipality is formed by amalgamation and there is no council, the Minister may appoint an official administrator who has all the powers and duties of a council of the municipality until the first council of the municipality is sworn into office.

RECOMMENDATION:

1. That JFAC agree to recommend the current CAO of Turner Valley, Shawn Patience, be named in the Amalgamation Negotiation Report as Interim CAO.
2. That JFAC agree to recommend the current CAO of Black Diamond Sharlene Brown be named in the Amalgamation Negotiation Report as a secondary option for Interim CAO.

Motion: That JFAC agree to recommend the current CAO of Turner Valley, Shawn Patience, be named in the Amalgamation Negotiation Report as Interim CAO.
That JFAC agree to recommend the current CAO of Black Diamond Sharlene Brown be named in the Amalgamation Negotiation Report as a secondary option for Interim CAO.

2. **Topic: Transitional Matters - #12 First Election**

“The election for the council of the amalgamated municipality may be held prior to the effective date of amalgamation (LAEA S. 8); however the new council may not be sworn into office before the effective date of the amalgamation of the former municipalities.”

Findings:

- a. The Subcommittee recommends that JFAC support a November 28th, 2022 election date.
- b. The Returning Officer, Verna Staples, will develop a comprehensive list of election information that could be included in the Ministerial Order.
- c. It was advised that a secondary option for the election date be provided in case the Minister does not support an early election. The Subcommittee agreed that a secondary date in Q1 2023 would be recommended to JFAC. However, the wording in the Amalgamation Negotiations Report would be very clear that the strong preference is for Nov. 28th, 2022, and provide rationale. If the secondary option is the Minister’s preference, the Amalgamation Negotiation report would request that the 14 members of council elected in October 2021 comprise the interim council until the new election. The mayor could be appointed from the 14 elected officials. The election would be requested to occur within 90 or 120 days after incorporation. Concern was raised by the Subcommittee that having an interim council reduces the potential cost savings.

RECOMMENDATIONS

1. That JFAC agree to recommend that a Q4 election date of November 28, 2022 for a new Council of the amalgamated Town and that this is the preferred option to be included in the ministerial order.
2. That JFAC agree to support this resolution in the Report on Amalgamation indicating that the reduction of one Council is part of the cost saving measures supporting the amalgamation process.
3. That JFAC agree to provide an alternative recommendation in the Negotiation Report inclusive of a 14 member Council comprised of the council elected in October 2021, with a Mayor being appointed from those 14 sitting Council members (MGA 150) for a period of 90-120 days after incorporation.

Motions:

1. That JFAC agree to recommend that a Q4 election date of November 28, 2022 for a new Council of the amalgamated Town and that this is the preferred option to be included in the ministerial order.
 2. That JFAC agree to support this resolution in the Report on Amalgamation as a reduction of one Council is part of the cost saving measures supporting the amalgamation process.
 3. That JFAC agree to provide an alternative recommendation in the Negotiation Report inclusive of a fourteen (14) member Council comprised of the council elected in October 2021, with a Mayor being appointed from those fourteen (14) sitting Council members (MGA 150) for a period of 90-120 days after incorporation.
3. **TOPIC: Transitional Matters - #25 Library Services (Intermunicipal Sheep River Library)**
 “By default, the Libraries Act states that when an amalgamation of municipal authorities has been initiated under the MGA and no agreement can be reached among those municipal authorities regarding the rights, assets and liabilities of a municipal library board, the Lieutenant Governor in Council may, by order, dissolve the municipal library board and may make any order the Lieutenant Governor in Council considers appropriate in respect of the disposition of the rights, assets and liabilities of the municipal library board. Ideally, an agreement would be in place to address the future of the municipal libraries and this should be included with the amalgamation application.”

Findings

This topic is different than other municipal services because the approach must also follow the Libraries Act. The existing library board must be dissolved as an intermunicipal library board. A new library board must be established with the new name of the town. The Library Board Chair and Manager will continue to work with the Public Library Board Advisor to determine the most appropriate wind down plan.

The Library Board will make a wind down plan based on the current plan of service. The wind down plan will be approved by the Library Board by resolution and approved by JFAC to be included as an appendix to the amalgamation negotiation report.

The suggested steps are:

- Both municipalities should apply to the Minister to dissolve the library board effective December 31, 2022.
- A new library board will need to be established through a municipal bylaw. The bylaw should be drafted to establish the library board and board membership prior to January 1, 2023 to reduce time lags for library services. The bylaw will need to be passed by the new council in order to appoint the new library board members.
- The Subcommittee suggests continuity of membership from the existing Sheep River Library Board to the new library board to assist in the transition.
- Library assets should be transferred to Black Diamond and Turner Valley to be held in trust under the newly amalgamated municipality until the new library board is established. The intent of holding the assets is to transfer them to the new library board.
- Address staff transition to the new board in advance. Library staff are employed by the current library board, and so a transition will need to occur between the intermunicipal library board, and the newly established library board.

- Council and the new library board will need to agree to retain the Marigold system. In the interim, the current library board will discuss with Marigold the current contract and options for interim service provision during the transition.
- Prepare to update the lease agreement.

Recommendation:

That the Procedure Subcommittee recommends to JFAC continuation of library services after January 1, 2023.

Motions:

That JFAC recommend the continuation of library services after January 1, 2023.

APPENDIX 10e

Finance Subcommittee Report, June 23, 2021

DISCLAIMER

Information as presented on June 23, 2021.

The content of this report outlines initial findings of the Finance Subcommittee; however, discrepancies in this information were identified. Corrected information was prepared for use in subsequent reports.

Amendments to the content were made at JFAC's direction and included in the Finance Report to Public. Please refer to the Finance Report to Public ([Appendix 3](#)) for the updated information.



FINANCE SUBCOMMITTEE REPORT

DATE OF MEETING:	June 23, 2021
SUBJECT/TOPIC:	Finance related topics – Black Diamond and Turner Valley
PURPOSE:	To provide recommendations to the Joint Friendship Agreement Committee on finance related topics
BACKGROUND/HISTORY:	<p>The scope of the report is to provide the details on financial impact of amalgamation. The financial review was considered a key component in responding to questions from the public and for evaluation purposes from JFAC's perspective. The following topics are included in this report and are meant to meet the requirements of both the amalgamation negotiation report to the Province and respond to questions that have been brought forward from the public. Those topics include:</p> <ol style="list-style-type: none">1. Topic #16: Compensation to other Municipal Authorities2. Topic #17: Financial Transition3. Topic #18: Interim Tax Treatment4. Topic #19: Tax Treatment (for properties previously annexed that have different tax considerations)5. Topic #20: Authority to Impose Additional Tax (to service pre-amalgamation debt) and considers infrastructure deficits and assets (including debentures, reserves, and condition of infrastructure), and capital equipment purchases6. Topic #21: Assessment Matters7. Topic: #27: Utilities8. Topic #28: Westend Regional Sewage Services Commission9. Deferred Revenue/Grants10. Topic #9: Other – Costs and Savings of Amalgamation11. Overall Finance Subcommittee Recommendation

The two towns are very similar in most financial aspects, fees, and tax rates. The Towns also utilize many of the same contracted services and the same accounting software. This is important information to be able to ensure effective transition if the negotiations are successful.

New Councils and administration can change everything to suit the needs of the town, hence there are no safeguards to “protect” the current Councils and Administration hard work and recommendations. All the recommendations being made can be undone.

Amalgamation Negotiation Topics (Finance)

1. Topic #16: Compensation to other Municipal Authorities:

Direction from the Province: “If there is a need to provide compensation from the proposed municipality to other municipal authorities, then the details of the compensation should be included with the application. Details must include at a minimum, the other party’s legal name, the amount of compensation, the timing of the compensation, and any other action(s) to facilitate the compensation.”

Findings: Through discussions with Municipal Affairs, the Towns understand the scope of this topic to include the following:

- Black Diamond is committed to paying Foothills County \$22,154 annually until 2024 for the purposes of the annexation payments. There is no other compensation to other municipal authorities.
- Turner Valley is committed to paying Foothills County \$10,000 annual compensation for the paving of 16th Avenue (Turner Valley portion of 434 Avenue). This is a ten-year agreement with last payment to be made in 2030. There is no other compensation to other municipal authorities.

Subcommittee Recommendation: That the Finance Amalgamation Sub-committee recommend to JFAC to include under Topic 16 in the amalgamation negotiation report that the amalgamated municipality would be required to pay Foothills County \$32,154/year until 2024 (for previous contractual agreements which include annexation agreements, and municipal road maintenance agreement) after which time the payment would be reduced to \$10,000/year with the last payment made in 2030.

Proposed Motion – Move that JFAC include under Topic 16 in the amalgamation negotiation report that the amalgamated municipality would be required to pay Foothills County \$32,154/year until 2024 (for previous contractual agreements which include annexation agreements, and municipal road maintenance agreement) after which time the payment would be reduced to \$10,000/year with the last payment made in 2030.

2. Topic #17: Financial Transition

Direction from the Province: “A financial audit is required for each of the municipalities that becomes amalgamated following the date of the amalgamation and then a separate audit will likely be required for amalgamated municipality for the period between the date of amalgamation and December 31 of that year. It would be crucial that each municipality’s auditors are consulted so that when the consolidation occurs after amalgamation, that potential problems are minimized.”

Findings: Both towns will be required to conduct year end audits in 2022 and then an audit will be conducted for the newly created town on December 31, 2023, which will rely on the individual audits of Black Diamond and Turner Valley prepared for the year ended

December 31, 2022. Currently both municipalities utilize different audit firms, Black Diamond employing Avail and Turner Valley employing MNP, but it has been confirmed that neither municipality is contractually obligated to continue with either firm past 2021.

Subcommittee Recommendation: That the Finance Amalgamation Sub-committee recommend to JFAC to require Black Diamond and Turner Valley to conduct independent audits for the year ending December 31, 2022. An audit will be conducted for the newly created town in 2023 which will rely on the audits of the individual towns performed for the year ended December 31, 2022.

Proposed Motion – Move that JFAC include under Topic #17 in the amalgamation report to the province that Black Diamond and Turner Valley conduct independent audits for the year ending December 31, 2022, and further that an audit will be conducted for the newly created town as at December 31, 2023.

3. Topic #18: Interim Tax Treatment

Direction from the Province: “If there is a need to treat property taxes differently for all or any portion of the proposed municipality for the current year, this would have to be mentioned and justified (most relevant when effective date is not Jan 1 (start of tax year)).”

Findings: At this time, we see no need to treat property taxes differently as the incorporation date would be Jan. 1, 2023, and tax rates for 2023 will be set in Q1 2023.

Subcommittee Recommendation: That the Amalgamation Finance Sub-committee recommend to JFAC that no interim tax treatment should be required since incorporation date would be Jan. 1, 2023.

Proposed Motion – Move that JFAC include under Topic #18 in the amalgamation negotiation report to the province that no interim tax treatment is required since incorporation date would be Jan. 1, 2023.

4. Topic 19: Tax Treatment (for properties previously annexed that have different tax considerations)

Direction from the Province: “If there are properties that were and are affected by previous annexations, and the property tax exceptions are still in effect, then these properties will need to be identified, along with any special considerations for them. For example, in some annexations, unimproved properties that are annexed may be taxed at the lower rate of the county’s tax rate or the annexing municipality’s tax rate until development occurs on that property. These exceptions may need to be extended to apply to the tax rates of the urban/rural service area (if a specialized municipality model is desired).”

Findings: Black Diamond has an agreement with Foothills County with regards to lands annexed to unify a boundary with Turner Valley and includes a clause which states for

the purposes of taxation in 2020 and in each subsequent year up to and including 2044 subject lands must be assessed as if they were in Foothills County and taxed as if they were in Foothills County until a triggering event noted in the agreement. This is also inclusive of any discounts which the Foothills County may offer (current 6% reduction if paid prior to September of any given year).

Subcommittee Recommendation: That the Amalgamation Finance Sub-committee recommend to JFAC that for the lands annexed by Black Diamond to unify a boundary between Black Diamond and Turner Valley, for the purposes of taxation in 2020 and in each subsequent year up to and including 2044, these lands must be assessed as if in the County of Foothills and taxed as if in the County of Foothills, until a triggering event noted in the agreement.

Proposed Motion – Move that JFAC include under Topic #19 in the amalgamation negotiation report that for the lands annexed by Black Diamond to unify a boundary between Black Diamond and Turner Valley, for the purposes of taxation in 2020 and in each subsequent year up to and including 2044, these lands must be assessed as if in the County of Foothills and taxed as if in the County of Foothills, until a triggering event noted in the agreement.

Topic #20: Authority to Impose Additional Tax (to service pre-amalgamation debt) and considers infrastructure deficits and assets (including debentures, reserves, and condition of infrastructure), and capital equipment purchases:

Direction from the Province: “The MGA provides the ability for the Lieutenant Governor in Council (Cabinet) to establish authority for the amalgamated municipality to impose additional tax(es) to service debt from prior to amalgamation. If approved, the additional taxes may be restricted to the properties of an area/community and the authority will be time-limited to ensure that the additional tax revenues are used to service that debt and nothing else.”

Comparison of Statement of Financial Position

Consolidated Statement of Financial Position For the Year ended December 31, 2020 Black Diamond and Turner Valley Comparison			
	BD 2020	TV 2020	Turner Valley & Black Diamond Combined
Financial assets			
Cash & temporary investments	\$ 10,774,147	\$ 2,796,757	\$ 13,570,904
Receivables			
Taxes & grants in place of taxes receivable	273,569	318,992	592,561
Trade & other receivables	640,197	2,480,117	3,120,314
Land held for resale	-	48,414	48,414
Investments	-	5,748,511	5,748,511
	<u>11,687,913</u>	<u>11,392,791</u>	<u>23,080,704</u>
Liabilities			
Accounts payable and accrued liabilities	350,474	378,916	729,390
Employee benefit obligations	118,240	-	118,240
Deposit liabilities	743,893	740,715	1,484,608
Deferre revenue	2,001,382	3,252,801	5,254,183
Long-term debt	611,337	1,447,438	2,058,775
Other liabilities	21,429	-	21,429
	<u>3,846,755</u>	<u>5,819,870</u>	<u>9,666,625</u>
Net financial assets	<u>7,841,158</u>	<u>5,572,921</u>	<u>13,414,079</u>
Non-financial assets			
Prepaid expenses	124,542	32,525	157,067
Inventory for consumption	50,668	2,362	53,030
Tangible Capital Assets	38,385,775	42,650,405	80,987,766
	<u>38,560,985</u>	<u>42,685,292</u>	<u>81,197,863</u>
Accumulated Surplus	<u>\$ 46,402,143</u>	<u>\$ 48,258,213</u>	<u>\$ 94,611,942</u>

Findings:

A. Local Improvement levy:

Local Improvement levies are utilized by the Town of Turner Valley to assist with the payment of large construction projects that benefit specific residents. The levies will stay with those properties in Turner Valley until such time as they are paid in full.

The Town of Turner Valley has ten (10) Local Improvement Levy bylaws. These bylaws represent various projects pertaining to utility and road work throughout the town. The total amount outstanding at December 31, 2020 is \$271,718.

The Town of Black Diamond does not utilize local improvement taxes at this time.

Subcommittee Recommendations: That the Amalgamation Finance Subcommittee recommend to JFAC that the Local Improvement levies remain with the Town of Turner Valley properties until such time as they are paid in full.

Proposed Motion – Move that JFAC include under Topic #20 in the amalgamation negotiation report that the Local Improvement levies remain with the Town of Turner Valley properties until such time as they are paid in full.

B. Long Term Debt:

The following is the current summary of long term debt for each municipality.

(\$000's)	Principle Balance 2021	Principle Balance 2022	Principle Payments 2022	Interest Payments 2022
Town of Black Diamond	\$611,337	\$519,586	\$ 97,113	\$ 26,585
Town of Turner Valley	\$1,447,438	\$1,330,989	\$120,199	\$ 48,017
Variance	\$836,101	\$811,403	\$23,086	\$21,432

*Details below: Appendix A – Long Term Debt

Subcommittee Recommendations: That the Amalgamation Finance Subcommittee recommend to JFAC that operating revenues continue to support the existing debts of both municipalities before and after amalgamation.

Proposed Motion – Move that JFAC include under Topic #20 in the amalgamation negotiation report that operating revenues continue to support the existing debts of both municipalities before and after amalgamation.

C. Reserves:

The following are the reserve balances at December 31, 2020, for each municipality.

	Turner Valley	Black Diamond
Operating Reserves	\$1,337,821	\$3,124,245
Capital Reserves	\$3,358,070	\$5,624,139
Offsite Levies	\$1,469,911	\$1,147,151
Total	\$6,165,803	\$9,895,535

* Details below: Appendix B – Reserves

Consolidated Debt Reserve Chart as of end of year 2020.

Long-Term Debt	Principle Balance 2021	Principle Balance 2022	Principle Payments 2022	Interest Payments 2022
Town of Black Diamond	\$ 611,337	\$ 519,586	\$ 97,113	\$ 26,585
Town of Turner Valley	\$ 1,447,438	\$ 1,330,989	\$ 120,199	\$ 48,017
Variance	\$ 836,101	\$ 811,403	\$ 23,086	\$ 21,432

Reserves as at December 31, 2020	Operating Reserves	Capital Reserves	Offsite Levies	TOTAL
Town of Black Diamond	\$ 3,124,245	\$ 5,624,139	\$ 1,147,151	\$ 9,895,535
Town of Turner Valley	\$ 1,337,821	\$ 3,358,070	\$ 1,469,911	\$ 6,165,802
Variance	\$ 1,786,424	\$ 2,266,069	\$ 322,760	\$ 3,729,733

Subcommittee Recommendations: That the Amalgamation Finance Subcommittee recommend to JFAC that designated capital reserves are utilized for the projects for which they were designated, and all existing undesignated capital reserves should be designated to restricted dedicated reserves contained within their 10-year capital plans prior to incorporation date. Further, that operating reserves should be contributed to equally based on Black Diamond and Turner Valley's requirements with the remainder to be designated to capital reserves.

Proposed Motion – Move that JFAC include under Topic #20 in the amalgamation negotiation report that designated capital reserves remain in the individual municipalities until they are utilized. All existing undesignated capital reserves should be designated to restricted dedicated reserves contained within their 10-year capital plans prior to incorporation date. Operating reserves should be contributed to equally based on Black Diamond and Turner Valley's requirements with the remainder to be designated to capital reserves.

D. Tangible Capital Assets (TCA's):

The Sub-committee reviewed Administration's report on the various infrastructure including the TCA net book value and 10 year capital plan comparisons. When looking at the TCA net book value, the difference between the numbers is based on many factors including different methodologies. The average years of assets and remaining useful life were also reviewed and did not raise any concerns about any inequities between the two municipalities. Based on the information, the subcommittee decided to use the approved 10 year capital plans as an indicator of infrastructure condition and costs to upgrade, as well as vehicle and equipment replacement. For the 10 year capital plan, TV has \$28.4M planned, and BD has \$38.2M planned.

A detailed report was prepared providing an analysis and staff recommendations for the Tangible Capital Assets (TCA's). It discussed the following asset classes:

- Buildings
- Engineering Structures
- Machinery and Equipment
- Vehicles

See Appendix E: Infrastructure Review and Analysis Report Attached for TCA details and Appendix F: TCA Schedule – Black Diamond and Turner Valley

10 Year Capital Plan – Black Diamond/Turner Valley

Subcommittee Recommendations: That the Amalgamation Finance Subcommittee recommend to JFAC that the ten-year capital plan be utilized as the indicator of the infrastructure condition and costs to upgrade. For the ten-year capital plan Turner Valley has \$28.4M planned and Black Diamond has \$38.4M planned. This will assist with addressing the infrastructure variations between the two towns by comparing priorities in each municipality.

Proposed Motion – Move that JFAC include under Topic #20 in the amalgamation negotiation report that the ten-year capital plan be utilized as the indicator of the infrastructure condition and costs to upgrade. For the ten-year capital plan Turner Valley has \$28.4M planned and Black Diamond has \$38.4M planned. This will assist with addressing the infrastructure variations between the two towns by comparing priorities in each municipality.

5. Topic #21: Assessment Matters

Direction from the Province: “If there is a need to treat current year property assessments differently for all or any portion of the proposed municipality, this would have to be mentioned and justified (most relevant when effective date is not Jan 1).”

Findings: At this time, we see no need to treat property assessments differently as the incorporation date would be Jan. 1, 2023. The tax rate and property tax assessments would not need to be treated differently as the new interim budget would be set in early 2023. As well, the assessment values (2022) would be released and the new tax rate for 2023 would be established in the early part of 2023. The municipalities utilize the same assessor, therefore, there is no need to treat property assessments differently.

Subcommittee Recommendation: That Finance Amalgamation Sub-committee recommend to JFAC that there is no need to treat property assessments differently since the incorporation date would be Jan. 1, 2023.

Proposed Motion – Move that JFAC include under Topic #21 in the amalgamation negotiation report that there is no need to treat property assessments differently since the incorporation date would be Jan. 1, 2023.

6. Topic #09: Other Matters Utilities

The Province does not specifically request information on utility rates. The Finance Subcommittee included utilities in the negotiation scope to be comprehensive in the review.

Findings: In 2019, the Town of Turner Valley introduced a new Utility Rate Bylaw and will be conducting another utility rate review in 2021. The Town of Black Diamond passed new utility rates effective May 1, 2021. The Black Diamond rate table provided is a sample based on single family residential. A rate schedule based on consumption or meter size. For specific rate schedule please see the attached link:

<http://www.town.blackdiamond.ab.ca/DocumentCenter/View/3499/Water-and-Sewer-Utility-Bylaw-18-01---Office-Consolidation-?bidId=>

<https://turnervalley.civicweb.net/filepro/documents/108?preview=43467>

Current Utility Rates:

Town	Water	Sewer	Storm	Consumption
Black Diamond	\$44.94	\$44.94	NA	\$2.46 m3
Turner Valley	\$25.67	\$33.79	\$10.05	*See below 3 Tier Rates

Turner Valley Consumptive Rates m ³	0 – 23 m ³	23.01 – 45 m ³	Over 46 m ³	Commercial
Water	\$1.86	\$1.93	\$2.00	\$2.00
Wastewater	\$2.64	\$2.66	\$2.67	\$2.70

Town	Waste Management – Solid	Waste Management - Recycle
Black Diamond	\$ 25.83	\$ 12.00
Turner Valley	\$ 28.00	\$ 12.00
Variance	\$ 3.83	\$ 0.00

Subcommittee Recommendation: That the Amalgamation Finance Sub-committee recommend to JFAC that the current utility rates for each municipality be continued until such time as a new utility rate bylaw is established.

Proposed Motion – Move that JFAC include under Topic #27 in the amalgamation negotiation report that the current utility rates for each municipality be continued until such time as a new utility rate bylaw is established.

7. Topic #9 Other Matters Westend Regional Sewage Services Commission

The Province did not specifically request information on the Westend Regional Sewage Services Commission. The Finance Subcommittee included this topic in the negotiation scope to be comprehensive.

Findings: Westend Regional Sewage Services Commission was established in 1984 by regulation of the provincial government.

To meet regulatory compliance, the Westend Lagoon Project is underway and the estimated cost is \$17.4 million and estimated completion date is early 2023. Funding for this project was by way of grants, reserves, and possible debentures.

Lagoon upgrade:

- Cost of project \$17.4 Million
- Grant amount \$11,952,792
- Westend Commission must come up with 27% of total project \$4,698,000
- Reserves end of 2021 \$964,726
- Possible Debenture amount \$3,250,500 payment schedule of 20 years.

Payment #	Payment	Principle	Interest	Balance
1	\$105,517.40	\$61,944.45	\$43,572.95	\$3,188,555.55

As there are only two parties involved in the commission, Black Diamond and Turner Valley, upon amalgamation the status of the commission would have to be dissolved and the assets and liabilities would then be incorporated into the new organization.

As of September 1, 2020, the Provincial government amended the MGA to streamline approvals for commissions. The streamline process includes the creation/amendment of bylaws which address the following:

- Changes to the RSC services
- Changes to board of director bylaws,
- Addition and removal of members or nonmember municipal authority customers
- Disposal of assets and
- RSC disestablishment.
- The required compliance date for bylaw submission is September 1, 2021.

The new MGA requirements for commission bylaws mean that the amalgamation negotiations must address that a new commission bylaw will be written clearly laying out the regional service commission disestablishment and disposal of the commission's assets. At the incorporation date of January 1, 2023, the Commission would be disestablished, and the assets and debts would then become part of the new municipality.

Subcommittee Recommendations: That the Amalgamation Finance Sub-committee recommend to JFAC that the Westend Regional Sewage Services Commission be disestablished and that the new municipality incorporate the assets and the debt into the new organization.

Proposed Motion

That JFAC request Westend Regional Sewage Services Commission establish a bylaw as per MGA S609.09(1) and provide the bylaw for inclusion into the Negotiation Report.

That JFAC request Westend Regional Sewage Services Commission provide recommendations for the disestablishment date - upon incorporation or extension timeframe of the commission.

8. Deferred Revenue/Grants

Deferred Revenue and Grants describe the revenue and grants from other orders of government and other organization that each municipality has already for projects in processes. This information is for Subcommittee and JFAC information and does not have any recommendations attached. There are two primary sources of grant funding that are consistently received on an annual basis although the amounts received can change.

Municipal Sustainability Initiative (MSI) Allocations - Municipal restructuring will not affect funding allocations to municipalities for a defined period under the MSI program. In cases where amalgamation or dissolution has occurred (post April 1, 2007), the restructured municipality will receive a funding allocation equivalent to that which would have been calculated pre-restructuring for a subsequent five years, and any unexpended funding will be transferred to the amalgamated/receiving municipality.

MSI – Capital grant program will be replaced with the Local Government Fiscal Framework beginning in 2024-2025 in the subsequent five years or end of the program whichever is earliest any unexpended funds will go to the new municipality. The funding mechanism is 48% per capita/48% based on education property tax requisition/4% kilometers of local roads.

Federal Gas Tax Fund (FGTF) Allocations – is a permanent source of funding provided to provinces. The FGTF would continue to be calculated separately for five years. After five years the calculation of the FGTF would be based on one municipality. The funding for the FGTF is based on a per capita basis.

Appendix C – Deferred/Grant Revenue – Black Diamond and Turner Valley

With a population over 5000, an amalgamated municipality would be eligible for the
Municipal Policing Assistance Grant: The Municipal Policing Assistance Grant assists communities with the financial costs of municipal policing and are available to municipalities with a population over 5001. Allocations are based on \$200,000 base payment + 8.00 per capita.

The detailed calculation of the municipal policing assistance grant is included below.

<i>Police Funding Model - Requisition - municipal population based on 5,000 and under</i> <i>(Provincial Police Service Agreement with RCMP)</i> <i>*Based on information received in 2020</i>			
Towns - Pre Amalgamation			
Year	Black Diamond	Turner Valley	Total Both Towns
Payable 2020	56,446	54,632	111,078
2021	84,729	82,006	166,735
2022	112,891	109,263	222,154
2023	169,458	164,013	333,471

<i>Police Funding Model - municipal population based on 5,001 to 15,000</i> <i>(Municipal Police Agreement with RCMP)</i> <i>*Based on information received in 2020</i>			
Year	New Municipality	Provincial Funding *	Net Amount - Post Amalgamation
Estimated Cost - 2023	550,000	(242,072)	307,928
Total	550,000	(242,072)	307,928
MPAG financial assistance is based on the following thresholds: <i>*Towns and cities with a population from 5,001 to 16,666 receive a \$200,000 base payment plus an additional \$8.00 per capita.</i> <i>* Population baseline ~ Black Diamond 2,700 and Turner Valley 2,559 total combined 5,259 (based on 2016 Census)</i> <i>*Does not replace the Municipal Enforcement/CPO Costs</i>			

The new municipality could recognize savings of \$25,543 under the new model based on municipal population of 5,001 to 15,000.

9. Topic #9 Other – Costs and Savings of Amalgamation:

The costs and savings of amalgamation have been an important discussion topic surrounding the negotiation. Where possible, potential costs and savings have been included. Costs can be broken down into one time costs, which have been estimated, and long term costs which cannot be determined at this time as they will be based on the future decisions of administration and Council. Short term savings have also been estimated and are listed below but long term savings are more speculative and cannot be determined at this time as they will be based on the future decisions of administration and Council.

Findings:

Examples of a similar municipalities with populations comparable to 5,000 are provided for information only as a relative comparison of the costs and revenues of towns similar in size to an amalgamated municipality. Two municipalities are Didsbury and Redcliff, with a comparison to amalgamated financial information of Black Diamond and Turner Valley. For information for the subcommittee, a comparison was completed and attached for your review under appendix D. Based on the comparison there would be nothing that is of significant concern. The expenses of a joint municipality are in line with the similar sized comparisons.

Appendix D – Black Diamond and Turner Valley Combined Comparison to Didsbury and Redcliff – Consolidated Statement of Financial Position and Consolidated Statement of Operations

Staffing Levels and Salaries: salary levels at the time of amalgamation will be maintained until such time as the interim CAO, in conjunction with the Council elected in 2022(23?), have determined service levels and organizational structure, at which point salaries and grid placement will be determined to provide salary parity in new municipality.' It may be advisable that these are considered, with potentially an HR specialist as discussed, well before Jan 1, 2023 since implementation will take some time and so any changes are reflected in a 2023 budget.

Amalgamation Costs/Savings

A high-level estimate of some of the costs to amalgamation are detailed on the next page. These are representative costs of merging two organizations. These two tables are for information purposes and do not include a recommendation.

ESTIMATED AMALGAMATION SAVINGS & COSTS - BLACK DIAMOND AND TURNER VALLEY

	Pre	1-3 mo	1-2 years	Long Term	Total Estimate Cost	Notes
ADMINISTRATIVE:						
Amalgamation Savings - Black Diamond and Turner Valley						
Audit - amalgamated entity			(15,000)		\$ (15,000)	
IT - Software (eliminate redundancy)		(20,000)			\$ (20,000)	
IT - Hardware (eliminate redundancy)				(20,000)	\$ (20,000)	
Office Equipment savings - postage meter / photo copiers			(12,000)		\$ (12,000)	
COUNCIL:						
One council - comprised of seven (7) members, six (6) councillors and one (1) mayor		(200,000)			\$ (200,000)	
Reduction of CAO role - Salary / wages / benefits / other costs / travel		(150,000)			\$ (150,000)	
GRANTS:						
Transition stream(Feasibility study and Maven Contract)	(250,000)				\$ (250,000)	
RCP ACP Grant 1/2, BD 1/4, TV 1/4 -pd portion of Mavn	(32,500)				\$ (32,500)	
Debt Servicing / Infrastructure		X			X	
ORGANIZATIONAL RESTRUCTURING:						
Duplication of duties and responsibilities - unknown will require service level review / organization structure review			X		X	
Review of amalgamated workforce, senior management team - unknown will require service level review / consultant assistance with organization structure			X		X	
Expected Amalgamation Savings - Black Diamond and Turner Valley					(699,500)	

One Time Amalgamation Costs - Black Diamond and Turner Valley						
BRANDING:	Logos / Branding	10,000			\$ 10,000	Previous BD Economic Development Branding
	Community Entrance Signs, Buildings and other facilities, town flags			17,500	\$ 42,500	4 Entrance signs based on 2019 upgrade to BD Entrance Signs
	Vehicle and equipment decals		8,100		\$ 8,100	BD approx. 30 fleetting equipment and vehicles
	Uniforms (CPO, Fire)		1,000	1,000	\$ 2,000	
	Mapping- GIS incorporation -		X		X	Need Quote from ORRSC
	Domains (website)		200		\$ 200	
	Webpage development		50,000		\$ 50,000	Based on IEDC website update
	Other Costs - name change/letter head/address change notices/printing costs/vehicle registries/Legal Seals/town stamps		5,000		\$ 5,000	Alberta Stamp Co need at least 2 corporate stamps ~ \$100/Letterhead/address change notices/printing costs/vehicle registry/corporate stamp

MERGING:	Roll files (including actual moving) - Reorganization/c reation of file storage to accommodate merged records	15,000			\$ 15,000	Received a quote from Global Industrial for role file case - cost for file replacement
	IT/Telus/compatibility of technology/c computer software, merging or incorporating other users	10,000			\$ 10,000	Not included in the quote from Bullet proof, number of users and licences will depend on the number of staff members - not a one time cost?
	Upgrade of phone system to accommodate additional lines and extensions for more staff	12,000			\$ 12,000	Turner Valley updated the
	IT - merging and changing e-mails, servers, etc.	51,500			\$ 51,500	
	Accounting System - we use the same agency, but there will be a cost to merge the systems into a new data base	15,000	75,000		\$ 90,000	used the 2008 through an inflation calculator awaiting quotes
MOVE:	Deploying staff to different locations/ furniture/office equipment/renovations to accommodate staff in buildings	100,000			\$ 100,000	
	Infrastructure - electric al/wiring to expand space	50,000			\$ 50,000	This could be considered a discretionary cost
CONSULTANTS:	Main - amalgamation consultant	200,000			\$ 200,000	\$145,000 Consultant cost will be increasing (2021 expense) - likely near \$200,000
	Urban Systems (feasibility study)	134,000				
	HR consultant HR policies should be done/reviewed by an expert	125,000		175,000	\$ 300,000	obtained from 2020099 Public Amalgamation QA Final Clean
LEGAL:	Any legal advice required when going through the bylaws/policies/contracts/alignment process	25,000		175,000	\$ 200,000	Public Amalgamation QA document, includes HR policies/bylaws - can be transitioned over a period of time
BANKING:	Banking requirements: selection/new cheques/deposits/information for vendors	X			X	Cost is minimal
COUNCIL:	Increased costs of Councils attending Amalgamation meetings	32,000			\$ 32,000	\$16,000 additional budget request for BD *2
	2022 Election	8,000			\$ 8,000	
STAFF:	Severance packages - organizational structure review and development			X	X	Costs unknown until new organizational structure is developed
OTHER:	Miscellaneous costs	25,000	25,000	25,000	\$ 100,000	obtained from 2020099 Public Amalgamation QA Final Clean
PLANNING:	Update of Planning documents			100,000	\$ 200,000	IDP/CF Foothills, LUB, Transportation Master Plan, Municipal Development Plan, Recreation Plan - Council can determine priorities over time
EXPENSES - ONE TIME COSTS					\$ 1,486,300	
Expected Revenue vs. Expenses					\$786,800	

There are grant opportunities that will be available to assist with the amalgamation transition costs.

Alberta Community Partnership Funding (ACP) following restructuring (amalgamation)

In accordance with the currently available 2020/21 guidelines, \$1,200,000 is the total grant amount the new town would be eligible to apply for following amalgamation January 1, 2023. However, grant totals could change based on program approval/guidelines in subsequent years.

The grant is provided based on the following two streams:

- Transition Stream - base amount of \$100,000 plus \$500 per capita – to a max of 300 persons for a total of \$250,000
- Debt servicing/Infrastructure Stream– base amount of \$500,000 plus \$1,500 per capita - to a max of 300 persons for a total of \$950,000

As the guidelines currently stand, projects occurring as a result of restructuring should be completed within two years following the date of municipal restructuring.

Cost Savings

There will be a reduction of one Council and one CAO. A service level review will be conducted by the new municipality's Council and CAO. The results of the service level review will guide an organizational structure assessment to determine and identify the optimal requirements for the amalgamated town.

It must be noted, however, that future decisions of Council cannot be predicted and while we can estimate many of the possible efficiencies and or additional costs related to amalgamation, decisions as to whether those efficiencies or additional costs are realized will lie with future Councils and administrations. It is also expected that there will be some reduction in administrative costs by eliminating redundancies between the two Towns including: Financial audit, IT, software, hardware, and office equipment. Assets including equipment and facilities will be reviewed for redundancies and efficiencies as well and the municipality will take advantage of economies of scale purchasing power.

Upon approval of the amalgamation, and through the transition period, a 1-to-3-year plan will be developed to guide administration and council through the transition period by identifying key tasks necessary to move both towns forward as one. During this time frame there may be other savings recognized.

Overall Finance Subcommittee Recommendation:

Subcommittee Recommendation: After reviewing all financial information related to amalgamation, the Finance Sub-committee recommends to JFAC that:

- A.** After reviewing all financial information related to amalgamation, the Finance Subcommittee recommends to JFAC that generally the financial position of the two

towns is similar overall. No major red flags have been discovered through this negotiation.

APPENDIX A – LONG TERM DEBT

Town of Turner Valley and Town of Black Diamond								
Long Term Debt - Debenture Schedule								
Town of Turner Valley								
Long Term Debt - Debenture Schedule								
Liability	Interest Rate	Loan #	Expires	Principle	Principle Balance 2021	Principle Balance 2022	Interest Outstanding 2021	Interest Outstanding 2022
ACFA - Town shop	4.04%	4001009	2026	355,112	281,936	267,940	96,756	85,505
ACFA - North Feeder	5.096%	3100148	2029	293,681	201,853	183,668	52,331	42,274
ACFA - Library	4.04%	4001007	2035	629,312	499,634	474,831	171,467	151,529
ACFA - Bypass	1.593%	4001896	2024	100,000	38,995	26,202	1,094	524
ACFA - Fire	2.718%	4001898	2036	300,000	239,439	226,314	53,718	47,299
ACFA - Tandem Dump Truck	2.299%	4002125	2026	100,000	62,719	52,854	4,784	3,399
ACFA - RLS/Parks	1.835%	4001897	2025	235,000	122,862	99,179	6,285	4,139
				2,013,105	1,447,438	1,330,989	386,436	334,669
Town Black Diamond								
Long Term Debt - Debenture Schedule								
Liability	Interest Rate	Loan #	Expires	Principle	Principle Balance 2021	Principle Balance 2022	Interest Outstanding 2021	Interest Outstanding 2022
ACFA - PW Shop Addition	2.97%	4001892	2040	139,598	119,259	114,818	39,808	36,295
ACFA - PW - Water Distribution Pumping Upgrade	6.38%	1185115	2026	295,307	116,300	99,784	27,283	19,869
ACFA - Sewer - Replacement Sanitary Sewer Mains	6.75%	1179465	2022	147,000	22,373	11,551	2,290	780
ACFA - Sewer - Extending the East Sanitary Sewer Truck Main	5.88%	1180397	2023	206,515	42,770	29,319	5,121	2,608
ACFA - Replacing Sanitary Sewer Mains	6.50%	1183359	2025	348,647	118,780	97,918	24,133	16,412
ACFA - Paving of 1st Street SW from 1 Avenue SW to 6 Avenue SW	5.00%	4000252	2027	438,500	191,856	166,196	35,230	25,954
				1,575,567	611,337	519,586	133,865	101,918
Variance				437,538	836,101	811,403	252,571	232,751

APPENDIX B – RESERVES

Reserves Listing as at December 31, 2020		
	Turner Valley	Black Diamond
Operating Reserves		
General Government	977,290	857,595
Protective Services		569,216
Transportation		559,797
Environmental - Water/Waste	240,279	579,210
Public Health Services - FCSS		226,716
Planning & Tourism	70,000	290,658
Recreation & Culture		41,053
Snow Removal	50,252	
Total Operating Reserves	1,337,821	3,124,245
	Turner Valley	Black Diamond
Capital Reserves		
Capital Reserve - General	474,263	2,532,632
Capital Buildings		814,015
Capital Land, Parks & Pathways	2,129,675	720,916
Capital Machinery & Equipment	120,000	1,122,190
Capital - F&D Hall	7,264	-
Capital Vehicles		349,681
Capital Engineering/Infrastructure	427,950	52,205
Capital - Planning	-	32,500
Capital - Pool	46,758	
Capital - SRRUC	148,350	-
Capital - Parking in Lieu	3,810	-
Total Capital Reserves	3,358,069	5,624,139
Total Reserves	4,695,891	8,748,384
Offsite Levies	1,469,911	1,147,151

APPENDIX C – DEFERRED REVENUE/GRANTS

Deferred Revenue as at December 31, 2020		
Grants	Black Diamond	Turner Valley
Operating Deferred Provincial Grants		
Southern Alberta Flood Response	101,264	1,374
Regional Collaboration Program (RCP)	3,988	-
Municipal Operating Support Transfer (MOST)	110,727	53,767
Canadian Mental Health Association	1,850	
Alberta Community Partnership	13,319	9,068
Family Community Social Services	2,095	
Other		7,771
Total Operating Deferred Provincial Grants	233,243	71,980
Capital Deferred Provincial Grants		
Municipal Sustainability Initiative (MSI Capital)	1,402,227	94,931
Donations - Pool and Spray Park		26,277
Federal Gas Tax Funding	24,293	97,349
Flood Recovery Erosion Control Program (FREC)	151,473	2,655,547
Other - BMTG/Socan/Prepaid Expenses		35,769
Park & Ride (Green Trip)	146,224	
Municipal Stimulus Program (MSP)	43,719	270,900
Total Capital Deferred Provincial Grants	1,767,936	3,180,773
Total Deferred	2,001,179	3,252,753
<i>*Prepaid Expenses included in Operating Deferred Provincial Grants - Other (TV)</i>		<i>7,743</i>

APPENDIX D - BLACK DIAMOND AND TURNER VALLEY COMBINED COMPARISON TO DIDSBURY AND REDCLIFF

Consolidated Statement of Financial Position For the Year ended December 31, 2020 Black Diamond and Turner Valley Combined in comparison to the Towns of Didsbury and Redcliff			
	Turner Valley & Black Diamond	Town of Didsbury	Town of Redcliff
Financial assets			
Cash & temporary investments	\$ 13,570,904	\$ 7,283,740	\$ 276,082
Receivables			
Taxes & grants in place of taxes receivable	592,561	464,317	2,467,254
Trade & other receivables	3,120,314	1,429,484	4,167,243
Loans receivable		277,123	1,143,643
Inventory and marketable securities		1,508,958	27,153,615
Land held for resale	48,414	-	873,550
Other inventories for resale	-	-	23,396
Investments	5,748,511	13,356	-
	<u>23,080,704</u>	<u>10,976,978</u>	<u>36,104,783</u>
Liabilities			
Accounts payable and accrued liabilities	729,390	761,627	1,424,734
Employee benefit obligations	118,240	116,103	193,017
Deposit liabilities	1,484,608	32,001	
Deferre revenue	5,254,183	3,176,586	5,137,136
Long-term debt	2,058,775	3,790,458	5,442,642
Other liabilities	21,429		
	<u>9,666,625</u>	<u>7,876,775</u>	<u>12,197,529</u>
Net financial assets	<u>13,414,079</u>	<u>3,100,203</u>	<u>23,907,254</u>
Non-financial assets			
Prepaid expenses	157,067	547,406	68,889
Inventory for consumption	53,030	53,322	265,606
Tangible Capital Assets	80,987,766	62,543,357	82,423,464
	<u>81,197,863</u>	<u>63,144,085</u>	<u>82,757,959</u>
Accumulated Surplus	<u>\$ 94,611,942</u>	<u>\$ 66,244,288</u>	<u>\$ 106,665,213</u>

APPENDIX D - BLACK DIAMOND AND TURNER VALLEY COMBINED COMPARISON TO DIDSBURY AND REDCLIFF

Consolidated Statement of Operations for the year ended December 31, 2020 Black Diamond and Turner Valley Combined Comparison to the Towns of Didsbury and Redcliff			
	Turner Valley & Black Diamond	Town of Didsbury	Town of Redcliff
REVENUE			
Net municipal property taxes	\$ 5,901,661	\$ 4,684,298	\$ 5,489,494
User fees & sales of goods	4,027,992	3,808,497	5,208,139
Government transfer for operating	906,389	1,095,263	643,123
Investment income	282,907	63,450	1,019,273
Penalties & costs of taxes	169,697	159,930	93,768
Licenses & permits	207,897	122,600	
Franchise & concession contracts	675,091	756,720	
Gain on disposal of TCA	8,000		
Contributed assets		637,153	
Rental	188,454		200,057
Other	126,730		1,157
Offsite levies & assessments	39,337		
	<u>12,534,155</u>	<u>11,327,911</u>	<u>12,655,011</u>
EXPENSES			
Legislative	352,632	207,502	137,002
Administration	1,891,100	871,962	1,360,524
Economic and agriculture development			
Protective Services	1,536,441	1,512,484	1,818,621
Transportation services	2,975,923	2,192,104	3,281,923
Water, wastewater and waste management	4,014,336	2,613,888	3,707,966
Other environmental use & protection	139,783		
Family & community support services	138,217		329,343
Cemeteries & crematoriums	112,000		
Planning & development	779,005	400,810	475,329
Parks & recreation	1,763,138	2,348,652	1,722,397
Culture -libraries, museums, halls	441,762		
Community services	-	514,044	
	<u>14,144,337</u>	<u>10,661,446</u>	<u>12,833,105</u>
Deficiency of revenue over expenses before other	<u>(1,610,182)</u>	<u>666,465</u>	<u>(178,094)</u>
Government transfer for capital	2,499,904	1,598,841	2,329,729
Gain (loss) on disposal of capital assets		(17,391)	
	<u>2,499,904</u>	<u>1,581,450</u>	<u>2,329,729</u>
Excess of revenue over expenses	815,945	2,247,915	2,151,635
Accumulated surplus, beginning of year	93,841,411	63,996,373	104,513,578
Accumulated surplus, end of year	<u>\$ 94,657,356</u>	<u>\$ 66,244,288</u>	<u>\$ 106,665,213</u>

APPENDIX E: INFRASTRUCTURE REVIEW AND ANALYSIS REPORT

FINANCE SUBCOMMITTEE REPORT

DATE OF MEETING: May 27, 2021

SUBJECT/TOPIC: Infrastructure Review and Analysis – Black Diamond and Turner Valley

PURPOSE: To provide recommendations to the Joint Friendship Agreement Committee on Infrastructure

BACKGROUND/HISTORY: The scope of the report is to provide the details on financial impact of amalgamation on the following:

Infrastructure Review – Tangible Capital Assets (TCA)

Below is an analysis and staff recommendations for the Tangible Capital Assets (TCA's) of Black Diamond and Turner Valley.

1. Buildings

There are currently buildings and facilities in Black Diamond and Turner Valley that serve similar and different purposes. It is likely that post amalgamation some buildings and facilities may not be fully utilized. Included within this asset grouping are key recreational facilities; arena, curling rink and outdoor swimming pool. As well, the Recycle Depot is included under buildings and facilities.

Staff Recommendation:

At this time, no buildings and facilities have been determined as not required. Upon formation of the new Council a full review of the buildings and facilities and a service delivery review will be conducted and any disposal or decommission of assets can be performed.

2. Engineering Structures

The asset group includes the following:

- A. Water and Storm
- B. Wastewater
- C. Emergency Services – Berms
- D. Recreation
- E. Roads

A. Water and Storm

There should be no immediate changes required to maintenance and operation of the water, storm, wastewater assets or services.

The water assets, except for water distribution, are owned and operated by the Sheep River Regional Utility Corporation (SRRUC).

Staff Recommendation: There will be no changes to this arrangement upon amalgamation.

Water and Storm Assets

The underground water distribution systems have been identified as assets requiring funds to upgrade infrastructure and repair leaks identified. This infrastructure will require further review in the years ahead. A full evaluation of all these assets is a critical piece of work required to be undertaken after amalgamation to determine where capital demands may be necessary. Additionally, referencing both the municipalities ten (10) year capital plans could assist in determining priorities.

B. Wastewater

The wastewater assets are currently owned and operated by the Westend Regional Sewage Services Commission (WRSSC).

The Westend facilities are composed of the Turner Valley lift station, equipment in the Black Diamond lift station, the sewage lagoons, the blower building the transfer station and the approximately 180 acres of property on which they sit in Black Diamond.

The Commission is funded through requisitions to each of the Towns. The Commission's expenses include utility costs, operator costs, maintenance and repair costs, administrative costs, and reserves. The amount paid by each town is based on their respective proportion of the total annual sewage flow (January 1 to December 31).

The Commission contracts operation of its facilities through the Black Diamond Public Works department. It contracts administrative services through Town of Black Diamond.

Source: <http://www.westendregionalsewageservicescommission.ca/about-us.html>

A significant infrastructure project – Lagoon System Upgrade project will begin in 2021 and completed in 2022. This requires considerable investment by Black Diamond and Turner Valley.

C. Emergency Services –

Black Diamond has berms that have been constructed to protect the town in case of a flood event. Turner Valley has constructed berms they currently reside in Work in Progress as the project will be completed in 2021. There is no requirement for any adjustments or maintenance to these assets.

Staff Recommendation: There is no requirement for any adjustments or maintenance to these assets upon amalgamation. These assets have a lengthy useful life remaining.

D. Recreation

The recreation assets are insignificant in the asset value of the engineering structures group. Included under Black Diamond's recreation engineering structures are pathways and paving of pathways. Turner Valley's recreation engineering infrastructure assets include pathways as well as, playgrounds, park, baseball, and rink structures.

Staff Recommendation: There is no need to make any changes upon amalgamation. The new Council will likely review these assets, but they should not be considered a priority in the short term. Included in the review will be a service level review to determine redundancies or upgrades that are necessary.

E. Roads

The largest infrastructure deficit between Black Diamond and Turner Valley is roads. Black Diamond has a replacement value in excess of \$67.4 M. Turner Valley has a replacement value in excess of \$45.2 M. An assessment of these assets should be performed upon amalgamation. It is noted that Black Diamond has 26% more Km's of roadways than Turner Valley and Black Diamond's capital plan costs for roads only include bringing current gravel roads back to gravel roads, not pavement, once underground repairs are completed.

Staff Recommendation: The new Council will need to address the road infrastructure deficit and differences between the two municipalities upon amalgamation. Review of both municipalities ten (10) year capital plan will assist with determining the priorities and needs in the immediate future. The towns of Black Diamond and Turner Valley could draw on reserves to assist in the funding of roads to reduce the infrastructure deficit.

3. Machinery and Equipment

The asset group includes assets under the following business units:

- Administration
- Fire Services
- Emergency Management
- Protective Services
- Common Services
- Roads
- Storm
- Sewer
- Water
- Parks and recreation
- Solid waste

Machinery and equipment are utilized across all areas of the operations.

Staff Recommendation:

Upon amalgamation there is no immediate need to adjust the machinery and equipment. The new Council will likely want to perform a service level review and review of the machinery and equipment to determine their condition. This will identify any redundancies and result in the retirement or sale of those assets not required.

4. Vehicles

The asset group includes assets under the following business units:

- Administration
- Protective services
- Common services
- Roads
- Transit
- Garbage
- Parks and recreation

Included under vehicles are trucks, fire services truck, SUV's, garbage truck (sold) and larger utility vehicles. The vehicles are utilized across a wide area of both Black Diamond and Turner Valley operations.

Staff Recommendation:

Upon amalgamation there is no immediate need to adjust the vehicle fleet. The new Council will likely want to perform a service level review and review of the vehicles to determine their condition. This will identify any redundancies and result in the retirement or sale of those assets not required.

Appendix F: TCA Schedule – Black Diamond and Turner Valley

Black Diamond Schedule of tangible capital assets - Consolidated Statement as at December 31, 2020

	Black Diamond			SRRUC			Total	Years	
	TCA	Amortization	Net Book Value	TCA	Amortization	Net Book Value		Average of Assets	Remaining useful life
Land	\$ 1,583,588	\$ -	\$ 1,583,588	\$ 174,079		\$ 174,079	\$ 1,757,667		
Land Improvements	1,991,381	369,188	1,622,193			-	1,622,193		
Buildings	5,606,347	2,187,601	3,418,746	473,890	70,939	402,951	3,821,697	11.4	29.5
Engineered structures	26,987,418	5,320,785	21,666,633	3,808,913	448,186	3,360,727	25,027,360	6.3	44.3
Machinery and equipment	4,806,693	2,299,851	2,506,842	158,002	58,931	99,071	2,605,913	11.0	5.9
Vehicles	3,306,405	1,499,519	1,806,886			-	1,806,886	7.6	3.9
Construction in progress	1,744,058	-	1,744,058			-	1,744,058		
	\$ 46,025,891	\$ 11,676,944	\$ 34,348,947	\$ 4,614,884	\$ 578,056	\$ 4,036,828	\$ 38,385,775	9.1	20.9

Turner Valley Schedule of tangible capital assets - Consolidated Statement as at December 31, 2020

	Turner Valley			SRRUC			Total	Years	
	TCA	Amortization	Net Book Value	TCA	Amortization	Net Book Value		Average of Assets	Remaining useful life
Land	\$ 545,741	\$ -	\$ 545,741	\$ 174,078		\$ 174,078	\$ 719,819		
Land Improvements	-	-	-			-	-		
Buildings	8,482,706	3,199,604	5,283,102	473,890	67,787	406,103	5,689,205	24.0	24.9
Engineered structures	47,757,965	20,125,941	27,632,024	3,808,913	391,571	3,417,342	31,049,366	25.7	25.4
Machinery and equipment	3,575,696	1,907,423	1,668,273	158,002	-	158,002	1,826,275	7.0	6.3
Vehicles	1,776,025	1,075,358	700,667	-	-	-	700,667	6.6	4.6
Construction in progress	2,665,073	-	2,665,073			-	2,665,073		
	\$ 64,803,206	\$ 26,308,326	\$ 38,494,880	\$ 4,614,883	\$ 459,358	\$ 4,155,525	\$ 42,650,405	15.8	15.3



Public/Stakeholder Consultation Subcommittee Report



DATE OF MEETING: June 08, 2021
For Presentation to JFAC June 23, 2021

SUBJECT/TOPIC: Amalgamation Transitional and Mandated Matters

PURPOSE: To provide the information requested by the Committee regarding the topics outlined in the report scope.

BACKGROUND/HISTORY: Through the amalgamation process, the municipalities must discuss the proposals included in the notice to amalgamate sent to the Minister and negotiate the proposals in good faith. Upon conclusion of the negotiations, the amalgamating municipalities must prepare a report to the Minister that describes the results of the negotiations.

REPORT SCOPE: The scope of this report is to provide the information to be considered for the Amalgamation report/application. The following topics are considered mandated matters for consideration to be included in the report.

1. #4 Electoral Wards

The following topics are considered transitional matters for consideration to be included in the report.

2. #15 Ward Boundaries Review

1. **TOPIC: Mandated Matters - #4 Electoral Wards**

“A description of the proposed electoral wards of the proposed municipality, along with the legal land descriptions outlining each ward is required.”

Findings: This topic was one of the two public engagement processes involved in developing the final negotiation report for the province. A survey was presented to the public for input on whether the public preferred to hold an ‘at large’ election or divide the new municipality into wards for the Q4 2022 municipal election. The s Electoral Ward vs At Large Election survey results were reviewed by Maven and presented to the subcommittee. The group reviewed the overall results, including incidents where there were five or more identical responses from the same IP address (both results were provided for review). The subcommittee agreed that no further engagement was required on this matter as more survey respondents had chosen ‘at large’ voting format than a ward system format.

Subcommittee Recommendation: that JFAC endorse ‘at large’ electoral representation for the 2022 Q4 election as opposed to dividing the new municipality into electoral wards.

Proposed Motion – Move that JFAC recommend under Topic #4 in the amalgamation report to the province that an ‘at large’ electoral representation be the preferred format for the 2022 Q4 election as opposed to dividing the new municipality into electoral wards.

2. TOPIC: Transitional Matters - #15 Ward Boundaries Review – not applicable

“Depending on the method used to develop the first set of electoral wards for the proposed municipality, a more formal review of electoral wards may be required prior to the second general municipal elections. If this is desired, please include this as part of the application package.”

Findings: This topic was not applicable due to the determination to hold an at large election in Q4 2022 as a result of the public consultation process regarding wards vs at large election

Proposed Motion – Move that JFAC recommend under Topic #15 in the amalgamation report to the province that a ward boundary review will not be required due to the determination to hold an at large election in Q4 2022 as a result of the public consultation

Electoral Ward Activity Survey Results

Total: 177

For At Large Representation: 86

For Wards: 77

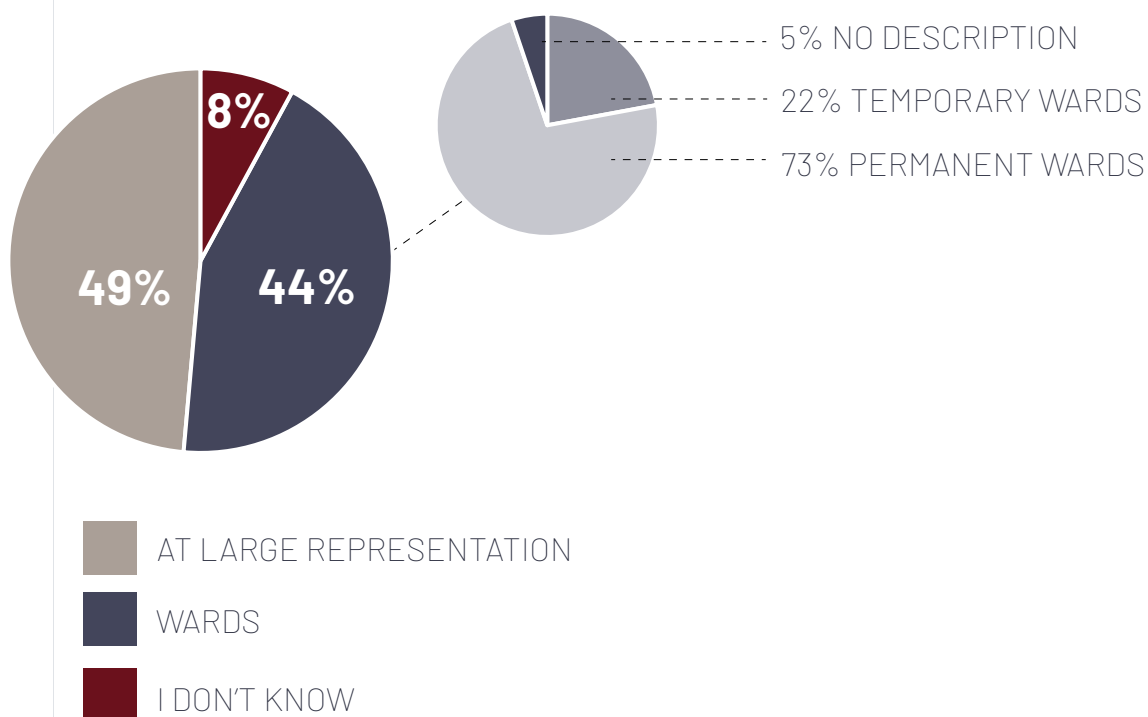
I don't know: 14

Wards Description

Permanent Wards: 56

Transitional Wards: 17

Wards - No Description: 4





Public/Stakeholder Consultation Subcommittee Report



DATE OF MEETING: June 08, 2021

For Presentation to JFAC June 23, 2021

SUBJECT/TOPIC: Amalgamation Mandated Matters

PURPOSE: To provide information requested by the Committee regarding the topics outlined in the report scope.

BACKGROUND/HISTORY: Through the amalgamation process the municipalities must discuss the proposals included in the notice to amalgamate sent to the Minister and negotiate the proposals in good faith. Upon conclusion of the negotiations, the amalgamating municipalities must prepare a report to the Minister that describes the results of the negotiations.

REPORT SCOPE: The scope of this report is to provide the information to be considered for the Amalgamation report/application. The following topics are considered mandated matters for consideration to be included in the report.

1. #1 Naming

1. TOPIC: Mandated Matters - #1 Naming

The proposed legal name of the municipality is required. Background information and/or other context behind the name is recommended as thorough checks will be completed to ensure that the new name does not:

- match any other municipal jurisdiction's name in Alberta.
- does not infringe on the any existing trademark or registered trademarks in Canada.
- does not use prohibited terms such as "royal", "Alberta", "Alta" or other terms identified in the Trade-marks Act (this is not an exhaustive list)

Traditionally, the name would have two components – the type of municipality, and place name.

Findings: This topic was one of the two public engagement processes involved in the developing of the final negotiation report for the province. The naming of the potential new municipality was broken into two separate processes:

1. An opportunity for engagement was presented to the public asking for suggestions for naming the potential new municipality, including adding drawings or stories to support their suggestions. The Naming Activity ran from May 19 - June 6, 2021 and saw a response from over 150 emails with over 200 suggestions for names for the new amalgamated municipality, including 70 different names.

The complete grand tally of numbers was as follows:

Diamond Valley: 106

Black Valley: 12

Sheep River: 10

Kiska Wapta: 8 (three of these specified further First Nations consultation is necessary)

Mountain Valley: 3

Sheep River Valley: 3

Black Diamond (for the whole new town): 2

Friendship: 2

Foothills: 2

Black Diamond – Turner Valley: 2

Other unique suggestions: 60

2. As a result of the above engagement, the subcommittee chose to move forward with the top three name suggestions and survey the communities as to their choice among the three options presented:

- Town of Sheep River
- Town of Diamond Valley
- Town of Black Valley

To ensure that the names being forwarded to the public were available and did not conflict with currently used names prior to putting them forward in the survey, staff consulted with Ron Kelland* who determined that the Alberta Geographical Names Database has no records of the names Sheep River, Diamond Valley and Black Valley ever being used for communities in Alberta. Staff also researched the Library and Archives Canada's "Post Offices and Postmaster" database and William Peter Baergen's book *Pioneering with a Piece of Chalk*. This is the most authoritative source for Alberta school district names. One reference of interest was Diamond Valley School District No. 2154, established in 1910 near Eckville, AB.

<https://westofthefifthmeridian.blogspot.com/search/label/Diamond%20Valley>

It appears that this was a School District name that became used as a shorthand name for the region. School District and School Division names are not recorded in the Alberta Geographical Names Database. There are many rural regions throughout Alberta that were identified by unofficial “district” names. As these names were not officially recognized, they were not documented by official sources such as provincial naming and mapping agencies. While the Alberta Geographical Names Program does document rural district and school district names when they are encountered, the Alberta Geographical Names Database does not have an exhaustive nor authoritative list of this type of unofficial name.

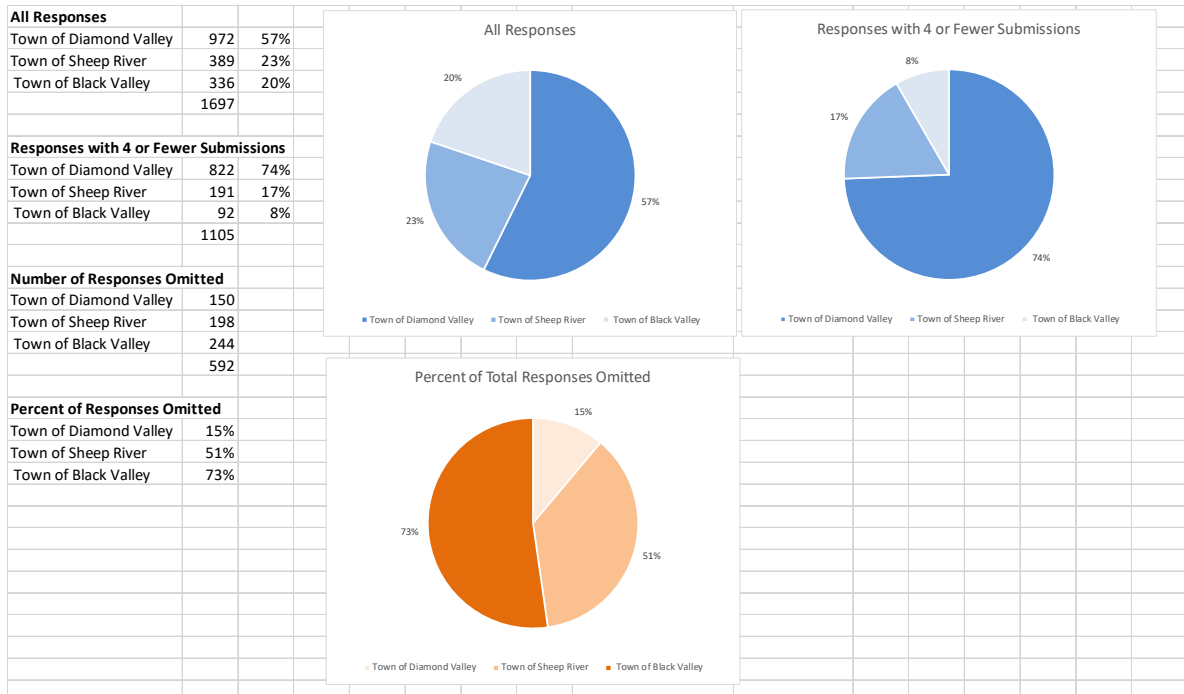
**Ron Kelland, MA, MLIS, Historic Places Research Officer and Geographical Names Program Coordinator, Culture, Multiculturalism and Status of Women, Heritage Division, Historic Resources Management Branch*

After confirmation that these names were not currently in use for a municipality in Alberta, the subcommittee presented the three names to the public in a survey which ran from June 14 to June 20, 2021.

The results from the final naming survey included just under 1700 responses, however, there were about 600 that were removed due to suspect IP activity (5 and over submissions from the same IP address). Of the remaining app. 1100 responses, the Town of Diamond Valley was the clear choice, receiving 74% of the votes. Town of Sheep River had 17% and Town of Black Valley 8%

Staff Recommendation: that JFAC propose the name ‘Town of Diamond Valley’ as the name of the amalgamated municipality in the amalgamation negotiation report to the province.

Proposed Motion – Move that JFAC propose the name ‘Town of Diamond Valley’ as the name of the amalgamated municipality in the amalgamation negotiation report to the province.



Naming Activity Results



Phase 1 of the Naming Activity ran from May 19 – June 6, 2021* and saw a response of **222** name suggestions for the new amalgamated municipality.

Diamond Valley made up **47%** of suggestions.

Black Valley, **5.4%** Black Diamond, **0.9%**

Sheep River, **4.5%**

Kiska Wapta, **3.6%**

Mountain Valley, **1.4%**
Friendship, **0.9%**

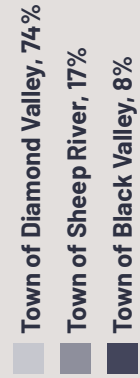
Sheep River Valley, **1.4%** Other, **27%**

3.6% of respondents called for further Indigenous consultation

8.1% of respondents indicated to retain town names under suggested municipality name

*responses were included up to June 9

Phase 2 of the Naming Activity ran from June 14 – June 20, 2021 as an online survey and saw over 1100 responses. Participants were asked to choose their favourite name from the top three most frequently suggested names in Phase 1.



APPENDIX 11

Sheep River Library Board Considerations for Amalgamation

Considerations for the Sheep River Library Board with regards to the proposed amalgamation between the municipalities of Turner Valley and Black Diamond.

The impact of the amalgamation:

1. The inter-municipal agreement will no longer be valid. In order for library service to be delivered, the municipality must pass a bylaw to establish a municipal library board. An example of such a bylaw can be obtained from the Provincial Library Service Branch of Municipal Affairs.
2. On being established, the municipal library board is a corporation and shall be known as “The (new name of the municipality) Library Board. Only the Board’s name will change. The library itself will still be called the Sheep River Library.
3. The members of the new library board must be appointed by the new council. It is the current board’s recommendation that those who are currently serving on the Sheep River Library Board at the time of amalgamation be appointed to the new board to serve out their three-year terms. This will allow for ease of transition.
4. A new agreement needs to be entered into with the Marigold Library System.
5. It is PLSB’s recommendation that an agreement be made between the Foothills County and the Library Board, regarding the 20% funding received from the county.
6. The new name of the board means anything that is in the board’s name needs to be changed or a new contract established such as:
 - Any bank accounts/cheques
 - The board’s Charitable registration
 - Canada Revenue Agency documentation
 - The Board’s Policy Manual
 - Alberta Trustee’s Association Membership
 - Contract with ADP (Payroll company)
 - The 2022 annual report for PLSB – under which Board name does this get submitted?

The current Library Board will endeavor to have the following in place before amalgamation takes place:

- A complete inventory of all assets owned by the board. This will include all financial assets.
- A transition plan regarding the rehiring of the current staff; how long the library will be closed during the transition; insurance coverage and contract positions such as the bookkeeper, auditor and cleaner.
- A current plan of service.
- As much information as possible will be collected for the 2022 annual report by the end of December 2022.

Amalgamation and the change of name of the Board should not have any impact on the Friends of the Sheep River Library Foundation.

APPENDIX 12

Westend Regional Sewage Services Commission Disestablishment Bylaw

Westend Regional Sewage Services Commission

June 28, 2021

Town of Black Diamond
Box 10
Black Diamond, AB
T0H 0L0

Town of Turner Valley
Box 330
Turner Valley, AB
T0L 2A0

Dear JFAC,

At the June 22, 2021, Westend Regional Sewage Services Commission (WRSSC) Regular Meeting, the Commission discussed the direction they would like to take should amalgamation proceed.

The Commission passed the following resolution:

Resolution 2021-50

That the Commission agree that a letter be sent to JFAC stating should amalgamation be approved, WRSSC will ask for a disestablishment date of December 31, 2023 to coincide with WRSSC financial year end and to permit completion of the scheduled upgrades.

MOTION CARRIED

The Commission is currently working on the new Commission Bylaw as per section 602.9(1) of the MGA. Upon Commission adoption, the Commission will send a copy to the two (2) Towns.

Sincerely,



Chair, Ted Bain

P.O. Box 10 Black Diamond, AB T0L 0H0
Contact: Garity Stanley, Secretary or Liza Zeer, Treasurer
Phone: (403) 828-2177
Email: info@westendregionalsewageservicescommission.ca
www.westendregionalsewageservicescommission.ca

**BYLAW 2021-01
WESTEND REGIONAL SEWAGE SERVICES COMMISSION**

BEING A BYLAW OF THE BOARD OF DIRECTORS OF THE WESTEND REGIONAL SEWAGE SERVICES COMMISSION TO PROVIDE FOR THE MATTERS REQUIRED BY SECTION 602.09(1) OF THE *MUNICIPAL GOVERNMENT ACT*.

WHEREAS, The Westend Regional Sewage Services Commission (the "Commission") was established by Alberta Regulation 277/1994, as amended or replaced;

AND WHEREAS, the Commission is a continued Commission pursuant to s 602.47 of the *Municipal Government Act*, RSA 2000, c. M-26;

AND WHEREAS the Board of Directors of the Commission wishes to enact a Bylaw respecting the matters set out in s. 602.09(1) of the *Municipal Government Act*, RSA 2000, c. M-26, as more particularly set out herein;

NOW THEREFORE the Board of Directors of the Commission, in the Province of Alberta, duly assembled, hereby enacts as follows:

1. TITLE

- 1.1. This Bylaw may be cited as the "Westend Regional Sewage Services Commission Bylaw."

2. CONTENTS

1. Title	1
2. Contents.....	1
3. Definitions	2
4. Members	3
5. Adding a Member.....	3
6. Member Withdrawal	3
7. Provision of Services.....	3
8. Directors of the Board	4
9. Duties of the Board	5
10. Meetings	5
11. Votes at Meeting	6
12. Electronic Communications.....	6
13. Notice and Cancellation of Meetings.....	7
14. Administration	7
15. Financial.....	8
16. Audited Financial Statements	8
17. Master Plan.....	9
18. Disposal of Assets by the Commission	9

BYLAW 2021-01
WESTEND REGIONAL SEWAGE SERVICES COMMISSION

19. Disestablishment of the Commission	9
20. Amendments	10
21. General	10

3. DEFINITIONS

- 3.1. “*Act*” means the *Municipal Government Act*, RSA. 2000, c. M-26; as amended from time to time;
- 3.2. “*Board*” means the Board of Directors of the Commission;
- 3.3. “*Bylaw*” means a Bylaw of the Commission;
- 3.4. “*Chair*” means the chairperson of the Board;
- 3.5. “*Commission*” means the Westend Regional Sewage Services Commission;
- 3.6. “*Continued Commission*” means the regional services commission established and existing under the former provisions as defined under s. 602.47 of the *Act*;
- 3.7. “*Director*” means a person appointed to the Board of Directors of the Commission in accordance with this Bylaw;
- 3.8. “*Director-at-Large*” means a person appointed to the Board in accordance with section 8.2 of this Bylaw; who does not represent a Member of the Commission;
- 3.9. “*Member(s)*” means the member municipal authorities as set out in this Bylaw;
- 3.10. “*Quorum*” means three (3) Directors of the Board are present;
- 3.11. “*Regular Meeting*” means the meetings of the Board to be held each year on dates and at a location to be determined by Resolution of the Board pursuant to section 13.2 of this Bylaw;
- 3.12. “*Resolution*” means a motion passed by a municipal authority or Commission;
- 3.13. “*Secretary*” means a person employed or contracted, and appointed by the Board, to provide administrative services to the Commission.
- 3.14. “*Service*” means, in respect of the Commission, a Service that the Bylaw authorizes the Commission to provide;
- 3.15. “*Special Meeting*” means a meeting called by the Chair pursuant to the *Act*;
- 3.16. “*Treasurer*” means a person employed or contracted, and appointed by the Board, to provide administrative and financial services to the Commission;
- 3.17. “*Vice-Chair*” means the Vice-Chairperson of the Board.

8/10/21

BYLAW 2021-01
WESTEND REGIONAL SEWAGE SERVICES COMMISSION

4. MEMBERS

4.1. The following municipalities shall be Members of the Commission:

4.1.1. Town of Black Diamond;

4.1.2. Town of Turner Valley.

5. ADDING A MEMBER

5.1. A Commission is established by Resolution or two or more founding municipal authorities, in accordance with 602.02 of the Act.

5.2. Another municipality that is not a Member may make an application to the Commission to join the Commission as a Member (the "Proposed Member") by submitting a Membership application. Upon the Commission's receipt of an application, the Board shall determine if additional information is required.

5.3. Upon the Board's review that a Membership Application should be forwarded for consideration, the Board shall send same to each Member for their respective approval. The Members agree that a simple majority of the Members, as evidenced by certified Resolutions from each of them, shall be sufficient to support the Membership Application and admit the Proposed Member as a new Member of the Commission.

5.4. Upon admittance as a new Member, the Proposed Member shall execute an Operating Agreement with the Commission to govern the operation and administration of the services.

6. MEMBER WITHDRAWAL

6.1. Notice to withdraw membership from the Commission shall be made in writing to the Board Chair.

6.2. Minimum notice to withdraw membership from the Commission shall be one (1) year. Notice must be provided on or before December 31st.

6.3. The Board will address any deficiencies created by Member withdrawal.

7. PROVISION OF SERVICES

7.1. The Commission shall supply sewage transmission and treatment services to all Member municipalities, and to any customers to whom the Board authorizes the supply of sewage transmission and treatment services.

A handwritten signature in black ink, appearing to be 'JLB' followed by a flourish.

BYLAW 2021-01
WESTEND REGIONAL SEWAGE SERVICES COMMISSION

8. DIRECTORS OF THE BOARD

- 8.1.** The Board shall consist of a minimum four (4) Directors that shall be appointed for a term of four (4) years as follows:
- two (2) Directors, who shall be an elected official from each Member of the Commission;
 - written notification of all appointments shall be provided to the Board by the Member municipalities;
 - a Member shall appoint an Alternate Director to act in place of each Director in accordance with the Act;
 - if for any reason a Director is unable to complete their term of office, the Alternate Director shall assume the duties of the Director until such time as a new Director is appointed by the Member.
- 8.2.** The Board may appoint one (1) non-voting Director-at-Large for a term of up to two (2) years.
The recruitment process shall include:
- advertisement in newspapers reaching all Member municipalities;
 - advertisement may be placed on the websites of all Member municipalities;
 - advertising must take place for a minimum of two (2) weeks;
 - applicants with relevant technical experience will be considered;
 - selection of the Director-at-Large shall be made in a Closed Session at a Regular Meeting by the Commission by a simple majority vote of Directors.
- 8.3.** Directors shall hold office until such time that:
- the end of the electoral or appointed term is reached;
 - the Director resigns;
 - the Director ceases to be an elected official, or;
 - the Director is removed by the Board.
- 8.4.** A Resolution approved by a simple majority of the Directors is required to remove a Director from the Board for any of the following reasons:
- unethical conduct, or;
 - the Director is absent from three (3) consecutive Regular Meetings of the Commission unless the Director's absence is authorized by Resolution of the Commission.
- 8.5.** Annually at the November meeting, the Board will appoint a Chair and the Vice-Chair for the following one (1) year period.




BYLAW 2021-01
WESTEND REGIONAL SEWAGE SERVICES COMMISSION

9. DUTIES OF THE BOARD

- 9.1. The Board shall be responsible for the management and conduct of the affairs of the Commission, which responsibility shall include, but is not limited to the following:
- adopting the Budget and Master Plan; and
 - maintaining the operations of the Commission in a manner which benefits its Members.
- 9.2. The Director-at-Large may be reimbursed for Board related travel expenses as approved by the Board and in accordance with the Budget. Travel expense rates to be set by the Board at a meeting in November.

10. MEETINGS

- 10.1. The Chair shall work with the Secretary to establish an agenda for any meeting of the Board. Directors shall be entitled to add time-sensitive items to the proposed agenda by submitting a written request to the Secretary before the meeting.
- 10.2. The Board shall adopt the agenda at the beginning of the meeting and may, upon agreement of the majority of those Directors present at the meeting, add or delete items from the agenda.
- 10.3. The Chair shall preside over each Regular Meeting or Special Meeting of the Commission.
- 10.3.1. The Chair may call a Special Meeting whenever the Chair considers it appropriate to do so, and
- 10.3.2. The Chair must call a Special Meeting if the Chair receives a written request for the meeting, stating the purpose, by the majority of the Directors.
- 10.4. All Directors shall vote on all matters before the Board unless the Director has a Pecuniary Interest. The Director shall disclose the general nature of the Pecuniary Interest, and abstain from discussing the matter or voting on the matter, and leave the room until discussion and voting on the matter are concluded, as prescribed by the Act. Disclosure of Pecuniary Interest shall be recorded in the minutes of the meeting.
- 10.5. The Chair shall perform all other and such other duties as are usually performed by the Chair.
- 10.6. In the absence of the Chair the Vice-Chair shall perform the duties of the Chair.
- 10.7. In the absence of the Chair at any meeting, the Vice-Chair shall preside over the meeting for that meeting only.
- 10.8. Board meetings are public meetings. Members of the public may attend as observers but shall not be permitted to participate in the meeting except as permitted by the Chair.
- 10.9. The Chair shall not begin the meeting or transact any business until a Quorum is present.
- 

BYLAW 2021-01
WESTEND REGIONAL SEWAGE SERVICES COMMISSION

- 10.10.** If a Quorum is not established within fifteen (15) minutes from the time set for the commencement of a Commission meeting, the Secretary shall record the names of all the Directors present and the meeting shall be adjourned.
- 10.11.** During a meeting should quorum be lost due to a Director leaving the meeting; or as a result of a Director's electronic communication connection being lost, the Chair may call a ten (10) minute recess to allow for the return of the Director or to re-establish a connection. If after ten (10) minutes a quorum is not re-established, the meeting must be adjourned, and any remaining Agenda items for that Commission Meeting shall be considered at the next Regular Meeting, unless a Special is conducted to complete such business.

11. VOTES AT MEETING

- 11.1.** All Directors or Alternates present at a meeting, with the right to vote, must vote, including the Chair.
- 11.2.** Guests, administration and technical advisors are not eligible to vote on any matter before the meeting.
- 11.3.** A simple majority vote on a motion constitutes an approval of the Resolution.
- 11.4.** A motion shall be declared lost when it: a) does not receive the required number of votes; or b) receives an equal division of votes.

12. ELECTRONIC COMMUNICATIONS

- 12.1.** Directors may attend a meeting utilizing electronic communications in accordance with the Act and any related regulations.
- 12.2.** Directors may use any method of two-way electronic communication available, including but not limited to; telephone conference platforms, videoconferencing software or other media that provide full audio and visual capabilities.
- 12.3.** Directors attending a meeting using electronic communications must ensure that their location is able to support the use of electronic communications, and an appropriate work environment, ensuring that all Directors participating in the meeting are able to communicate effectively.
- 12.4.** A Director may attend a Regular Meeting or a Special Meeting by means of electronic communication a maximum of two (2) times per calendar year, unless otherwise approved by a Resolution or authorized by the Act or any related regulation.
- 12.5.** A Director attending a Regular or Special Meeting via electronic communications shall not chair a meeting unless the majority of Directors attend via electronic communications.
- 12.6.** Directors attending a meeting via electronic communications shall vote verbally, only after all other Directors present have voted in their usual

BYLAW 2021-01
WESTEND REGIONAL SEWAGE SERVICES COMMISSION

manner. In the event that a majority of Directors are attending via electronic communications, all Directors shall vote verbally as called upon by the Chair.

- 12.7.** Director may attend a Closed Session using electronic communications only if the Directors are able to ensure that their location provides privacy for confidential participation in the Closed Session.
- 12.8.** The Commission may request or permit any person or group, such as but not limited to a contractor, consultant, auditor, lawyer or other advisors, to attend a Regular or Special Meeting using electronic communications. They may attend a Closed Session only if such persons can confirm their ability to ensure privacy for confidential participation in the Closed Session.

13. NOTICE AND CANCELLATION OF MEETINGS

- 13.1.** Notice of all meetings will be provided in accordance with the Act.
- 13.2.** Regular meetings will be scheduled by Resolution at a meeting in November (after elections in an election year) for the following one (1) year period.
- 13.3.** A meeting may be cancelled, by Resolution of the Board, in accordance with the Act and this Bylaw, including the cancellation of any or all Regular Meetings in the month of July and August.
- 13.4.** If the Commission changes the date, time or place of a regularly scheduled meeting, the Commission must give at least 24 hours notice of the change as per s. 193(3) of the MGA.

14. ADMINISTRATION

- 14.1.** There shall be Administration and advisors as determined by the Board at its discretion from time to time.
- 14.2.** The Administration shall act as the administrative head of the Commission and without limiting the foregoing shall:
- ensure that policies and programs of the Commission are implemented;
 - advise and inform the Board on the operations and affairs of the Commission;
 - perform the duties and exercise the powers assigned in this Bylaw, the Act and other applicable legislation;
 - receive and disburse funds of the Commission in accordance with the directions of the Board, subject to this Bylaw;
 - keep detailed accounts of all income and expenditures, including proper vouchers for all disbursements of the Commission.
- 14.3.** The Secretary shall ensure that copies of the Agenda for a Regular Meeting are published:



BYLAW 2021-01
WESTEND REGIONAL SEWAGE SERVICES COMMISSION

- for Directors no later than 4:30 pm on the fifth (5th) day prior to the day on which the meeting is to be held; and
 - available on the website no later than 4:30 pm on the fifth (5th) day prior to the day on which the meeting is to be held.
- 14.4.** The Agenda for a Special Meeting will be published as soon as possible based on the needs of the meeting.
- 14.5.** Meeting minutes will be sent to Member municipalities' Councils for information purposes.

15. FINANCIAL

- 15.1.** The financial year of the Commission shall be the calendar year.
- 15.2.** Without limiting the requirements of the Act, the Board in the fall of each year will adopt a budget for the subsequent year.
- 15.3.** The borrowing powers of the Commission shall be in accordance with the Act.
- 15.4.** The fees to be charged by the Commission to its customers for the supply of sewage transmission and treatment services shall be based on the annual full cost recovery for supplying the service, including an allowance for reserve accounts.
- 15.5.** Without limiting the generality of section 15.4, the cost referred to includes the debt services cost of debenture repayments.
- 15.6.** The Commission may establish and maintain one or more reserve accounts in the annual Budget to provide for renewals, alterations, extensions and contingencies in respect to the works and shall credit the reserve accounts and expend, use, apply and allocate funds from them for the purposes and in the amounts determined by the Commission.
- 15.7.** Retail sewage transmission and treatment rates shall be determined by each of the Member municipalities.
- 15.8.** The Commission shall establish retail rates for customers other than Member municipalities.

16. AUDITED FINANCIAL STATEMENTS

- 16.1.** The Commission must prepare audited annual financial statements for the immediately preceding calendar year.
- 16.2.** The Commission must submit its financial information return and audited annual financial statements to the Minister and each Member of the Commission by May 1st of the following year for which the return and statements have been prepared.



BYLAW 2021-01
WESTEND REGIONAL SEWAGE SERVICES COMMISSION

17. MASTER PLAN

- 17.1.** The Board shall, from time to time, adopt a Master Plan which will set out:
- an assessment of the Commission's existing assets and projected maintenance and asset acquisition requirements;
 - a written forecast of the amounts of sewage;
 - engineering and other information supporting the forecast, including, without limitations, information regarding the forecast population, business and industrial growth on the Members.
 - the Master Plan will be reviewed every four (4) years.

18. DISPOSAL OF ASSETS BY THE COMMISSION

- 18.1.** The disposal of any assets owned by the Commission requires the approval of the simple majority of the Board of Directors, and shall be subject to any terms and conditions established by the Board.
- 18.2.** The assets of the Commission shall be liquidated and distributed to municipalities that are Members at the time of disestablishment.

19. DISESTABLISHMENT OF THE COMMISSION

- 19.1.** Any Resolution to disestablish the Commission requires unanimous approval of the Board of Directors.
- 19.2.** In the event the Board approves the disestablishment of the Commission, the Board must at the time of approval specify further particulars of the procedure for disestablishment including:
- a timeline for disestablishment of the Commission, and;
 - the distribution of the assets and liabilities upon disestablishment of the Commission, which shall include a process for the collection and disposition of any property and assets owned by the Commission and the discharge, assignment or transfer of the Commission's obligations for the provision of services, and provide for any residual or remaining assets of the Commission to be distributed to the current Members at the time of disestablishment.
- 19.3.** The Commission shall, as of the date of the Board's decision to approve disestablishment of the Commission, cease to provide services or begin the process of ceasing to provide services except to the extent that the Commission is legally required to do so or as required for the beneficial winding-up of the business or affairs of the Commission.



BYLAW 2021-01
WESTEND REGIONAL SEWAGE SERVICES COMMISSION

20. AMENDMENTS

- 20.1.** An amendment to this Bylaw may be passed by the Board in the form of an amending Bylaw adopted by first, second and third readings.
- 20.2.** Written notice of the proposed amendment shall be provided to each Member by publication of a Regular or Special meeting agenda.

21. GENERAL

- 21.1.** It is the intention of the Commission that each section of this Bylaw should be considered as being separate and severable from all other sections. Should any section or part of this Bylaw be found to have been improperly enacted, then such section or part shall be regarded as being severable from the rest of this Bylaw and that the Bylaw remaining after such severance shall be effective and enforceable.
- 21.2.** Within the text of this Bylaw:
- use of a pronoun or determiner which indicates one gender shall include all genders unless the context requires otherwise, and
 - use of the singular shall include the plural and the plural shall include the singular, as the context requires.
- 21.3.** Bylaws 2013-01 and Bylaw 95-01 and any amendments thereto are repealed in their entirety.
- 21.4.** This Bylaw will take force and effect upon third and final reading and signing thereof.

READ A FIRST TIME this 9 day of August A.D. 2021.

READ A SECOND TIME this 9 day of August A.D. 2021.

READ A THIRD AND FINAL TIME this 24 day of August A.D. 2021.



CHAIR



SECRETARY

24 Aug 21
Date signed

APPENDIX 13

Other Required Transition Plans

OTHER REQUIRED TRANSITION PLANS

As part of the transition process in amalgamation, the Town of Black Diamond and the Town of Turner Valley have committed to completing the following within an appropriate timeline:

- Library Transition Plan
- Bylaw and Resolution Plan
- Fire Department Transition Plan

APPENDIX 14

Boundary Map

