



Working Together to Rebuild the Municipal Tax System in HRM

HRM Tax Reform Project

~ Communication & Public Participation Plan ~

Last updated: April 4 2007



HRM TAX REFORM STRATEGY
Communication and Public Participation Plan
PHASE 3 - ENGAGING THE PUBLIC

April 2, 2007

Key Dates:

April 12-TRC approves communications approach, public participation and engagement

April 17- Update to Council

Risk: If not sent to Council by April 24th, no Spring consultations possible.

April 18- Send information brochure to print (2 weeks, then to ratepayer associations, libraries, Customer Service Centres, and website)

May 16- Begin spring consultations. **Ends beginning June.**

Objective: To get agreement on what the municipal tax system should be based on as well as critical taxation principles. Allows us to build options for the Fall.

Approach: Five workshops advertised in newspapers and other media, approach ratepayers associations, etc...

June 26- Update to Council.

Oct 1 - Begin fall consultations. **Ends first week of November.**

Objective: To get agreement on municipal taxation options and possible recommendations. Present three tax packages based on the foundations and principles from Spring workshops.

Approach: Series of 10 to 12 open house/ small group discussions aimed at education re tax options, and their pros, cons and impacts. Possible wrap-up Open House.

January – Recommendation to Council.

February – Public information sessions. Wrap up Committee's work.

Communication supports:

- Letter to stakeholders and special interest groups
- Newsletters and e-mails
- Follow up surveys with CRA
- Advertising campaign to encourage people to sign up for workshops
 - Information brochure to Libraries, Web, etc...
 - News paper ads
 - Website
- PSAs and news release updates
- Updated website
- Set up live feed to website for those that cannot attend workshops (Canada News Wire).

TAX REFORM PUBLIC PARTICIPATION PROCESS

Background

Halifax Regional Municipality (HRM) is moving away from the traditional public hearing format of public participation that result in an “us” vs. “them” environment. HRM wants to improve on the value of public participation by educating the public on the current tax system’s issues as well as Tax Reform, all while encouraging active public participation throughout tax reform process.

Changes to the tax system in HRM will not affect all taxpayers in the same fashion. In an attempt to create a tax system that better reflects basic principles, some tax bills may increase while others may decrease. It is important, then, to incorporate taxpayers in the design phase, and throughout the tax reform process. HRM staff wants to work with taxpayers, the Nova Scotia government and other stakeholders to address their main concerns with the current tax system, and together create solid foundations for the future system. Involving the public and other stakeholders in the Tax Reform process will help ensure that diverse interests and concerns are addressed; the result will be a stronger, more sustainable tax system that the HRM community has had a share in creating.

Why is a communications plan important?

A communication strategy is to provide an overall framework for integrating, managing and coordinating the communications and public consultation initiatives that will guide the process of the Tax Reform project.

This plan is a working document, as the process of Tax Reform has already begun. The tactics and dates are interchangeable, and can be altered at any time.

Who is leading the public participation? The Tax Reform Committee. In December, 2006 Regional Council established a Tax Reform Committee of Council (TRC). The TRC is comprised of 6 Councillors and 7 residents from HRM. The TRC is geographically and otherwise diverse, and have members that represent the interests of both residential and commercial tax payers.

Who is the decision maker? Halifax Regional Council. While the Tax Reform Committee is leading the Tax Reform project, and will be responsible for working with the public to make recommendations for a new Tax System, Halifax Regional Council will make the ultimate decision.

Who are the stakeholders?

There are a number of key stakeholders whose involvement is critical to the success of Tax Reform. Amongst them are:

- The general public
- Business groups, including the Chamber of Commerce
- Taxpayers
- Ratepayers and citizen groups
- Halifax Regional Municipality (staff, council, SMT, CAO and DCAO), and other municipalities in Nova Scotia
- Province of Nova Scotia
- The Union of Nova Scotia Municipalities

The success of Tax Reform relies upon strong stakeholder support that is representative of all areas and facets of HRM.

COMMUNICATIONS PLAN

Phase 1

April 2004- Continuous

RESEARCH & PUBLIC EDUCATION

Details: Tax Reform has been discussed by Regional Council or Committee of the Whole (COW) on a number of occasions. Initially, a motion was passed by Council on April 16, 2004 to look at alternatives to the current property tax system. From that point on, staff has been busy conducting jurisdictional research (both nationally and internationally), benchmarking analyses, best practice research, and academic research. Staff has developed several useful models from this research, including a resource allocation model (SERA model), and commercial benchmarking models. In addition, in conjunction with Corporate Research Associates Inc. (CRA), staff has conducted several municipal wide surveys to gauge issues with the current municipal tax system, and interest in the Tax Reform project.

Research findings are then passed onto the public in an attempt to strengthen public education surrounding Tax Reform. This phase is an on-going process of informing the public of where we are in the process, information about decisions made and next steps. In addition, this phase will be about educating the public on the status quo of the current municipal tax system, and some options for rebuilding the tax system as a community. The main objective of this phase is to encourage tax payers to think about municipal tax system, and how it could be improved. While the surveys allowed for “two-way” communication between the public and HRM staff, the majority of this phase involves disseminating information on municipal taxation to the general public. A database of people who are interested in the Tax Reform process will be developed from herein, to send information about upcoming events, and news about the process.

Communications support:

- Draft survey questions
- Information brochure
- Newsletters & e-mails
- PSAs, ads
- Website updates
- Corporate Research Associates – Urban Report

Public Participation support:

Surveys

In November of 2005, Corporate Research Associates (CRA) surveyed HRM residents to help identify citizens’ concerns with the current system. The survey was comprised of approximately 13 questions on the municipal tax system.

The survey allowed staff to determine which taxation issues were prominent in different geographical areas of HRM. The survey was also used as a tool to gather information on peoples’ attitudes towards local government taxation issues. The survey had 401 respondents from across HRM.

A second, smaller CRA survey was conducted in November 2006. This survey focused on measuring public awareness and interest in the Tax Reform project. The second survey had 400 respondents from across HRM, and consisted of two questions surrounding Tax Reform.

Information Brochure

In the fall of 2005, staff developed a 4 page information brochure intended for use as an educational piece on Tax Reform, and encouraging the public to become involved in the process. The information brochure is intended to be the main print communication tool for the Tax Reform strategy.

The information brochure has already been prepared and is in its final draft. Two focus groups have been conducted (one with internal staff in August 2005, and one externally in February 2006). Feedback was gathered on the general usefulness of the information brochure, its look and its content. The feedback was used as a test to help determine and predict the attitudes and opinions of the general public and stakeholders.

Next Steps:

The brochure will be sent to print the middle of April, for distribution the beginning of May 2007. This brochure will be available at public consultation events throughout the Tax Reform process, as well as in HRM Customer Service Centres and Libraries.

Phase 2

October 2006 - present

ESTABLISH TAX REFORM COMMITTEE (“TRC”)

Details: A Tax Reform Committee (TRC) comprised of HRM staff, Councillors and residents was established in December 2006. The TRC will be present throughout the process to ensure that stakeholders can contribute to the project. The TRC will advise on appropriate steps throughout the Tax Reform process, review materials and feedback from public participation and community meetings and provide guidance in the decision making process.

Communications support:

- Newspaper ads in CH and Daily News
- PSA
- Website launch

Public Participation support:

Tax Reform Website www.halifax.ca/taxreform

The website was launched in the fall of 2006. It is used as an educational and informative tool for the TRC, general public, and other stakeholders that wish to learn more about HRM’s Tax Reform project.

The website contains information on the issues with the current system, a copy of the information brochure, updated TRC meeting agendas and minutes and other tax reform related materials. All advertising and communications efforts will suggest people visit the website for more information on the process of Tax Reform. The website’s success can be partially measured by the amount of hits we get monthly, or during particular phases of the process.

Tax Reform Committee (TRC)

The TRC provides an important communication and public participation link between HRM and the broader community and stakeholders. The TRC is the public’s and business owners’ eyes and ears throughout the tax reform process. This will help ensure that all different issues and concerns are recognized. In addition, the TRC aid in the analysis of information gathered from public participation, and help form recommendations for council. Again, this helps ensure that all stakeholders have a place in tax reform throughout the entire process.

Phase 3

May 14-June 8 & October 1- November 2 2007
ENGAGING THE PUBLIC

Details: The main objective of this phase is for HRM to hear the thoughts of residents and stakeholders on how the municipality should shape the new tax system, and what new options should be explored. The consultation will occur in two steps; public participation discussions in spring 2007 on the foundations of the tax system, and an open house on taxation options based on these foundations held in the fall. Throughout this phase, HRM may also gauge public sentiment on tax reform issues through a supplementary CRA survey.

Communication Support

- Letter to stakeholders & special interest groups
- Newsletter and e-mail
- Follow up surveys with CRA
- Advertising campaign to encourage people to sign up for workshops
- PSAs and news releases
- Update website with information
- Set up live feed to website for those who cannot attend (Canada NewsWire)

Public Participation: Tax Workshops SPRING

Workshops will be held across HRM in the spring of 2007 to better understand which tax system foundations are most important to the people in that area. The workshops will be the main public participation forum to encourage two-way communication between staff and taxpayers. While the majority of the workshops will be residential, there will also be a business community workshop to help ensure that the commercial side has the ability to contribute to the development of public policy.

Through a series of presented scenarios, small groups of community members (6-8 people), will discuss what foundations a tax system should be based upon: should the tax system be based on services, ability to pay, or a combination of both? As well, participants will discuss the importance, and priority of key taxation principles: equity, simplicity, transparency, stability, predictability, and economic growth. Participants will have the opportunity to express their taxation concerns not relevant to the workshop discussions through a comment collection centre located in the meeting room.

Next Steps:

- Final revision of agenda
- Final development of scenarios
- Hold practice workshops with TRC and internal group
- Find additional facilitators for roundtables
- Book locations, set final dates
- Develop materials needed for mail outs to participants
- Hold press conference
- Letter to stakeholders & special interest groups

- Distribution of Discussion paper
- Newsletter and e-mail
- Advertising campaign to encourage people to sign up for cafes
- PSAs and news releases
- Update website with information
- Set up live feed to website for those who cannot attend (Canada News Wire)

Tax Workshops FALL

In the fall of 2007, staff and the TRC will bring more in-depth “Tax Option” packages, based on foundation information gathered from the first series of workshops, to the general public for discussion and feedback.

The workshops will be organized through an open house type format, the general public will have the opportunity to examine the proposed tax packages (approx. 3), and then break into smaller workshops to further discuss the implications and attributes of each package, highlighting pros and cons.

Next Steps:

- Book location, set final date
- Develop appropriate packages based on information gathered from the Spring workshops
- Develop open house materials
- Hold focus group on materials
- Letter to stakeholders & special interest groups
- Newsletter and e-mail
- Advertising campaign to encourage people to sign up for workshops
- PSAs and news releases
- Update website with information
- Set up live feed to website for those who cannot attend (Canada News Wire)

Phase 4

January 2008

RECOMMENDATION TO COUNCIL

Details: To be determined based on recommendations from Public Participation and approval of Tax Reform Committee.

Communications support:

- News release
- Update website
- Newsletter, e-mail

Phase 5

Date TBA

INFORMATION SESSIONS

Details: To inform and educate citizens on the Tax Reform process, and what can happen to change the tax system as it exists today. More details TBD.

Communications support:

- News release/ PSA
- Update website with information
- Newsletter, e-mail
- Information piece – brochure, booklet (TBD)

Phase 6

Date TBA

IMPLEMENTATION

Details: To be determined based on recommendations from Public Participation and Tax Reform Committee.

Communications support

- News release
- Update website
- Newsletter, e-mail

Phase 7

Date TBA EVALUATION

Details: Every good communications strategy/ campaign should be measured through evaluation. The Tax Reform process is a public process, and the evaluation tools for success are listed below.

- Media monitoring
- Corporate Research Associates – Urban Report
- Public Comment, feedback
- Surveys – written and online
- Public Participation
- Council review



Date	Task	Duration of Task
April 12, 2007	TRC approve approach to communications, public participation, & public education	1 day
Week of April 16	Practice workshops with focus group- with Kim H.	1 day
April 19, 2007	Practice workshop with TRC- with Kim H.	1 day
April 17, 2007	Update to Council	1 day
Approx. April 20, 2007	Tax Reform public education brochure to print	2 weeks
April 25, 2007	Start advertising for spring workshops (website, newspapers, send brochure to ratepayers, libraries, customer service centers)	2 weeks
May 14, 2007- June 11, 2007	Workshops (5) in various locations across HRM	4 weeks
June 26, 2007	Update to Council	1 day
June 26, 2007- September 17, 2007	Organize information gathered from spring workshops, interpret findings, develop tax options based, test options with focus group and TRC	2 ½ months
September 17, 2007	Start advertising for second round of workshops (news papers, press release, website, etc.)	2 weeks
October 1- November 2	Second round of workshops	1 month
November 27, 2007	Update to Council	1 day

