HALIFAX

P.O. Box 1749
Halifax, Nova Scotia
B3J 3A5 Canada

Item No. 2
Halifax Regional Council
March 8, 2016

TO: Mayor Savage and Members of Halifax Regional Council

SUBMITTED BY: Original Signed

Councillor Waye Mason, Chair, Community Planning and Economic Development Standing Committee

DATE: February 29, 2016

SUBJECT: Economic Strategy & Halifax Partnership Update Q3 (October – December) 2015-2016

INFORMATION REPORT

ORIGIN

Motion passed by the Community Planning and Economic Development Standing Committee at a meeting on February 18, 2016.

LEGISLATIVE AUTHORITY

Section 4 (b) of the Committee's Terms of Reference: 'The Community Planning and Economic Development Standing Committee shall oversee the Municipality's Economic Plan, Economic Prosperity Indicators and Immigration Action Plan by overseeing the progress of the Municipality's Economic Strategy and Outcome areas and related initiatives.'

BACKGROUND

The Committee received a staff report on this matter at its February 18, 2016 meeting. The Committee passed a motion recommending that the report be forwarded to Council for information.

FINANCIAL IMPLICATIONS

None.

COMMUNITY ENGAGEMENT

Not applicable.

ATTACHMENTS

Attachment 1: Staff report dated February 8, 2016

A copy of this report can be obtained online at http://www.halifax.ca/council/agendasc/cagenda.php then choose the appropriate meeting date, or by contacting the Office of the Municipal Clerk at 902.490.4210, or Fax 902.490.4208.

Report Prepared by Sheilagh Edmonds, Legislative Assistant 902.490.6520

ATTACHMENT 1

HALIFAX

P.O. Box 1749
Halifax, Nova Scotia
B3J 3A5 Canada

Item No.
Community Planning and Economic Development Committee
February 18, 2016

TO: Chair and Members of Community Planning and Economic Development Committee

SUBMITTED BY: Original Signed

Maggie MacDonald, Managing Director,
Government Relations & External Affairs

DATE: February 8, 2016

SUBJECT: **Economic Strategy & Halifax Partnership Update Q3 (October – December) 2015-2016**

ORIGIN

March 22, 2011: MOVED by Councillor Nicoll, seconded by Councillor Streatch that Halifax Regional Council endorse the 2011-2016 Economic Strategy for Halifax Regional Municipality. Motion put and passed.

June 2, 2015: MOVED by Councillor Mason, seconded by Councillor McCluskey that Halifax Regional Council approve the amending agreement to the Services Agreement with the Halifax Partnership that replaces the 2014/2015 Schedule A with the 2015/2016 Schedule A included as Attachment 3 to the April 24, 2015 staff report. Motion put and passed unanimously.

LEGISLATIVE AUTHORITY

The Halifax Regional Municipality Charter 2008, c. 39, s. 1. permits the municipality to undertake a variety of economic development activities.

RECOMMENDATION

It is recommended that the Community Planning and Economic Development (CPED) Standing Committee receive this report and forward it to Regional Council for information.

BACKGROUND

Economic Development in Halifax

From a policy perspective, economic development entails governments' and communities' efforts to improve the economic well-being and quality of life in their respective jurisdictions. This is often accomplished by attracting, keeping and growing jobs, and by increasing incomes and tax bases.

The Halifax Regional Municipality (HRM) is a significant economic development stakeholder in the city. It: manages six business and industrial parks; regulates businesses and land development; invests in major infrastructure; establishes and supports Business Improvement Districts; collaborates with other levels of government and agencies on economic development issues; and, provides financial and in-kind support to regional, community, cultural organizations and special events.[1]

HRM also provides operational support to three organizations to further its economic development objectives: Destination Halifax, which promotes Halifax as a destination for business and leisure travelers; Trade Centre Limited, which operates the Scotiabank Centre, the World Trade and Convention Centre and the soon-to-be-opened Halifax Convention Centre; and, the Halifax Partnership (the Partnership), which provides professional economic development expertise and services to HRM, and oversees much of the implementation of the city's economic strategy. As a public-private economic development organization, the Partnership leverages funding from private investors and other levels of government as well.

Partnership deliverables to the municipality are outlined in a service level agreement that is reviewed and amended annually. In 2015-16, the municipality contributed $1,768,428 to the Partnership – an operational grant of $1,633,428, as well as $135,000 to develop Halifax's 2011-16 economic strategy. This year, municipal funding accounts for approximately 47% of the Partnership's budget.

Current Economic Strategy

In March 2011, Regional Council endorsed *AGreaterHalifax*, the municipality's economic strategy for 2011-2016. The current strategy has five themes and related goals:

- **Regional Centre** – Build a vibrant and attractive Regional Centre that attracts $1.5B of private investment and 8,000 more residents by 2016;
- **Business Climate** – Promote a business climate that drives and sustains growth by improving competitiveness and by leveraging our strengths;
- **Talent** – Create a welcoming community where the world's talent can find great opportunities, engaged employers and resources for advancement;
- **International Brand** – Create a unique international city brand for Halifax; and,
- **Maximize Growth Opportunities** – Capitalize on our best opportunities for economic growth.

In the last economic strategy update to CPED on October 15, 2015, municipal staff outlined specific progress the municipality and the Partnership have made in fulfilling the 48 actions planned for years 3-5 of the strategy. Municipal staff also reported on the four key measures to gauge economic progress more broadly in the city – population, employment and income levels, and the commercial tax base.

[1] See Office of the Auditor General, *Economic Development through Partnerships – A Performance Evaluation.* February 2013. Pages 32-35.

DISCUSSION

This report is provides:

- an overview of Halifax's economy and business climate in 2015;
- highlights (and a full listing) of HRM's and the Partnership's recent activities in fulfillment of the 2011-16 economic strategy;
- a brief description of the ongoing development of Halifax's new economic strategy for 2016-21; and,
- proposed next steps regarding future reporting of activities related to the current and the renewed economic strategies for Halifax.

Halifax's Economy and Business Climate in 2015

It was a positive 2015 for the Halifax economy. The Conference Board projected real GDP growth of 2.3% for the year, among the highest in Canada. Growth was driven by the preparation for, and beginning of, shipbuilding at the Halifax Shipyard, as well as robust multi-unit residential and nonresidential construction. However, the switch to seasonal natural gas production at Deep Panuke led to a downgraded GDP forecast for the year. Weaker-than-expected numbers from the Labour Force Survey in the fourth quarter (compared to a very strong Q4 in 2014) softened the annual labour market indicators that were reported in the Partnership's October Economic Report.

In terms of Halifax's business climate in 2015:

- **Business confidence remains flat.** The share of local businesses confident in Halifax as a place to do business remains steady. Half (51.5%) consider Halifax a good or excellent place to do business, compared to 52.2% in January last year. Fifty-four percent of businesses noticed an improvement in the business climate, and 80% predict Halifax will become an easier place to do business (compared to 49% and 80%, respectively, last January).

- **Rural businesses are concerned with talent and representation.** Rural businesses in Halifax rate workforce quality lower than businesses overall (-18.8% vs +15.1%), and have similar issues with workforce availability (-28.4% vs -8.8%). They also consider these issues to be more important than their urban counterparts. Rural businesses have also expressed concern that they are overlooked during conversations on rural issues, as they are often conflated with Halifax and its urban centre.

- **Businesses are satisfied with some municipal services.** Business ratings of Halifax's municipal services have improved significantly since January 2015, and particularly over the past nine months. Public water, sewer and police protection are among the highest rated services, considered "good" or "excellent" by a strong majority of businesses. However, public transportation and building inspections and permitting are considered "fair", and municipal roads rated "poor." Relatedly, the Halifax Partnership intends to release an Industry Insight report by April 2016 that outlines the construction and development industry's specific challenges with the local regulatory environment.

- **Opinion of government regulation and taxation, while still mostly negative, has improved across the board.** Municipal taxation is still considered "poor", though ratings have increased 7.6% over the past year. Business opinion about municipal regulation rose 5.9% over the same period, but is still considered only "fair".

- **Workforce issues remain a concern.** Halifax businesses have continued to downgrade their opinion of the local labour market as qualified talent becomes harder to find. Opinions have been declining over the past year on both workforce quality and workforce availability.

The above business climate observations were based on 286 interviews the Partnership's SmartBusiness staff conducted with companies between January and December.
Looking forward to 2016, the Conference Board is projecting a pick-up in GDP growth to 3.0%, supported by the first full year of work at the Halifax Shipyard, continued strength in the construction and services sectors, and less drag from the natural gas sector.

The Partnership's *Halifax Economic Report – January 2016* and *SmartBusiness Quarterly Report – January 2016* are included as attachments.

2011-16 Economic Strategy Update – Municipal Unit Activities

As mentioned, the current economic strategy has five goals – to build a vibrant and attractive Regional Centre, create a business climate that drives growth, build a welcoming community that attracts and keeps talent, develop a unique international brand, and capitalize on the city's best opportunities for economic growth. With these in mind, in 2013, Council approved 48 actions municipal and Partnership staff would undertake in the last three years of the strategy. Attachment 3 provides a full listing of those actions, and the Partnership's and HRM's progress in fulfilling them in the third quarter.

From October to December 2015, municipal business units undertook the following key things as part of the economic strategy's implementation:

- public consultations on the development of the new Centre Plan, a set of regulatory guidelines for private land development that will replace four municipal planning strategies, were held;
- a review of planning application processes to reduce the regulatory burden was finalized;
- significant upgrades to parking enforcement technologies were made;
- a preliminary work schedule, procurement plan, and overall project budget for the redevelopment of the Cogswell lands were developed;
- the bridge connection from Chain of Lakes to Crown Drive, as well as the design work for a multi-use overpass of the CN main line between Pine Hill Drive and Saint Mary's University, were completed;
- Phase I of the Halifax Green Network Plan to Regional Council was presented;
- an in-depth assessment of the municipality's Employment Equity Program and Employment Equity Policy was completed; and,
- a Youth Leadership Forum to encourage and prepare African Nova Scotian youth for leadership roles in the city was held.

Halifax Partnership's Recent Activities

Attachment 4 is an April-to-December progress report on the 2015-16 HRM-Partnership Service level Agreement.

Below outlines the Partnership's recent work in the areas of investment attraction, business retention and expansion (BRE), rural economic development and workforce attachment.

Investment Attraction

The Partnership continues to collaborate with Nova Scotia Business Inc. (NSBI) and other partners to attract and retain business investment. The Partnership has supported several site visits and helped NSBI connect potential new businesses to business, academic and research partners, and various resources. To ensure a seamless customer experience with one main contact point, NSBI remains the lead organization for Direct Foreign Investment projects.

For the period April 1 to December 31, 2015 the Halifax Partnership's investment and trade activities, including missions, partner referrals, information requests, etc., contributed to six successful projects that resulted in more than 885 jobs and a $100,000 business-to-business (B2B) contract. The Partnership is working on another 40 investment project leads, of which seven companies have shortlisted Halifax as an expansion location.

The Partnership leverages the following to attract investment to Halifax:

- **International Partnerships.** The Partnership has lead responsibility for managing Economic Relationships under the municipality's International Partnership Policy. These relationships include:
    - **World Energy Cities Partnership (WECP).** WECP is comprised of 21 cities from around the world with energy activities as a major driver of their economy. The WECP is led by the Mayors of each city with support from economic development staff.

      In January 2015, the Mayor assumed the role of President of the organization for a two-year term. As the new Presidential city of WECP, Halifax has been invited to lead a business mission to both Aberdeen (Scotland) and Stavanger (Norway). The Partnership and NSBI are organizing a business mission to both cities in April 2016. The mission will focus on companies in the oceans and logistics sectors.
    - **Norfolk, Virginia.** Halifax and the City of Norfolk, Virginia have been International Sister Cities since 2006. In September 2015, the Partnership hosted a Virginia Economic Development Partnership (VEDP) business mission to Halifax during Canadian Defence and Security and Aerospace Exhibition Atlantic. In October, the Partnership hosted a business community reception onboard HMCS Halifax at Naval Station Norfolk. More than 150 business leaders from NATO, Navy, Aerospace & Defense and Oceans attended. The Partnership will invite a Norfolk delegation to Halifax in June 2016 to participate in Oceans Week, which will focus on the marine renewable and marine defence industries.
    - **Aberdeen, Scotland.** Halifax and Aberdeen, Scotland have a long-standing relationship focused on developing mutually beneficial economic and cultural ties. Building on the successful June 2015 mission to Halifax by Aberdeen companies, as mentioned above, Halifax is planning an oceans and logistics outbound business mission to Aberdeen in April 2016.
- **Consider Canada City Alliance (CCCA).** The Consider Canada City Alliance (CCCA) brings together Canada's large cities – Halifax, Toronto, Montréal, Vancouver, Ottawa, Calgary, Québec City, Winnipeg, Waterloo Region, London and Saskatoon -- to improve Canada's ability to attract new investment and trade opportunities. In November, the Partnership participated in a CCCA investment and trade mission to Rotterdam, Zurich and Stockholm. More than 50 business connections were made and 20 B2B meetings took place with companies in the ICT, aquaculture, shipbuilding and marine services, and life sciences sectors. The Partnership is now managing seven promising investment and trade leads resulting from the mission, and working closely with its counterparts at NSBI and Canadian embassies on follow-up activities.
- **Halifax Gateway.** Through a management services agreement, the Partnership manages the Halifax Gateway Council. In 2015, it led a series of in-market activities in Europe and Chicago to educate companies on the opportunities of moving cargo and people through the Halifax Gateway. In November, for example, representatives from CN Rail, the Port of Halifax, Halifax Stanfield International Airport and the Halifax Gateway Council undertook a business mission to London, Liverpoool, Dublin, Glasgow and Aberdeen.

The Partnership's investment attraction work will be informed by a new Foreign Direct Investment (FDI) Strategy being developed in conjunction with the new 2016-21 Halifax Economic Strategy. The Partnership has commissioned KPMG to develop the FDI strategy in cooperation with HRM and NSBI staff, and in alignment with the aims of Global Affairs Canada. It will provide enhanced value proposition data, background research, and a 36-month action plan that supports the Partnership's investment attraction efforts in targeted foreign markets.

Business Retention and Expansion

The Business Retention and Expansion team continues to work one-on-one with businesses to help them overcome challenges. Between January 1st and December 3st, 2015, the SmartBusiness team conducted 237 diagnostic surveys with businesses to measure, evaluate and develop strategies to meet their business needs. The Partnership reports that issues identified and resolved through these consultations helped create and retain 409 jobs in the city.

Please see Attachment 2 for the Partnership's *SmartBusiness Quarterly Report – January 2016.*

Rural Economic Development

The business needs and economic opportunities of Halifax's rural communities, particularly those outside of the city's commuter areas, are different than those in urban Halifax. To better understand and address them, in 2015 the Partnership hired an intern to grow its already existing SmartBusiness presence in rural areas, and to forge greater links with rural business associations, particularly those on the Eastern Shore.

Between June and December 2015, the Partnership conducted 75 SmartBusiness interviews with rural businesses, compared to 12 such visitations in 2014.

In terms of economic development along the Eastern Shore, the Partnership has focused on working with local business, the Atlantic Canada Opportunities Agency and Destination Eastern and Northumberland Shores to promote the tourism potential of the Bay of Islands ("100 Wild Islands"). It is also trying to help community groups access government funding to upgrade internet service in the area.

The *SmartBusiness Quarterly Report – January 2016* (Attachment 2) includes an analysis of rural business needs and opinions based on SmartBusiness visitations conducted since 2012.

Workforce Attachment

The Partnership continues to connect local businesses and organizations with immigrants, international students and recent local and international graduates. Its related initiatives are:

- **Halifax Partnership Connector Program.** The Connector Program a networking program that helps local businesses and organizations connect with immigrants, international students and recent local and international graduates who are interested in starting and growing their career in Halifax. Through one-on-one meetings, local business and community leaders known as Connectors meet with talent interested in opportunities in Halifax. The Connector gains access to a wealth of diverse, pre-qualified talent and Connectees gain insight into their professional network, and connect with career opportunities.

  In 2015, the Partnership presented the program's benefits at more than 100 career, program and networking events. Of the 305 Connectee participants in the program in 2015, 142 found jobs. More specifically, 43 immigrants, 47 international graduates and 48 local graduates secured employment.

- **National Connector Program.** The Partnership is also leading a National Connector Program (NCP) for Canada. There are currently 20 Connector communities across Canada, two in the US (St. Louis and Detroit) and one in Sweden.

- **Pre-Arrival Connector Program Pilot.** In September of 2015, the Partnership launched the Pre-Arrival Connector Program Pilot in partnership with the Colleges and Institutes of Canada. The Partnership has received funding as a Focal Point Partner (FPP) for the Colleges and Institutes of Canada's Canadian Immigrant Integration Program (CIIP). A National Pre-Arrival Connector Program Advisor (8 month term) has been hired to process economic-class immigrant referrals from the Canadian Offices Abroad and refer them to the National Connector Program's communities of interest. The Coordinator will qualify approximately 115 clients. There is potential of extending this program through to March 2019 as an FPP of CIIP's funding proposal to Citizenship and Immigration Canada.

- **Game Changer Action Plan.** The Game Changers Action Plan, an initiative aimed at retaining young talent in Halifax, was launched in November 2015 (www.halifaxgamechangers.com). More than 200 private and public sector leaders attended the launch hosted by the Mayor and the Partnership. It was created in response to the Partnership's October 2015 Youth Retention study which found that each year, on net, Nova Scotia loses 1,300 young people between the ages of 20 and 29.

  The Game Changers initiative: leverages the Partnership's SmartBusiness and Connector programs to connect businesses to the resources they need to hire young talent; raises awareness about the youth retention issues and encouraging businesses to hire them through a multi-media advertising campaign; undertakes research to inform youth employment policies and programs; and, includes the creation of events that showcase young talent in Halifax and celebrates employers who hire it.

Economic Strategy Renewal

On June 2, 2015, Regional Council authorized staff to develop an updated five-year economic strategy. The Halifax Partnership is overseeing the strategy's creation. In September 2015, KPMG was awarded the contract to develop the strategy. The economic strategy process will include development of a vision, main areas of focus and actions based on input from key stakeholders and the broader community.

The strategy is being guided by an Economic Strategy Advisory Committee (ESAC) that includes representatives from the private sector, military, universities, the provincial government, HRM and the community at large. ESAC is chaired by Matt Hebb, Dalhousie University's Assistant Vice-President of Government Relations, and supported by a smaller working group of KPMG, the Partnership and HRM staff.

Updates on the strategy's development were provided to the CPED Standing Committee on November 19, 2015 and January 21, 2016. Since that time, an engagement session with urban aboriginal stakeholders was held at the Mi'kmaw Native Friendship Centre. The Economic Strategy Working Group continues to refine the strategy's proposed objectives and year-one actions with input from an internal committee of HRM staff, as well as from other stakeholders.

A detailed draft strategy will be presented to the CPED Standing Committee for endorsement in March 2016, with the intention of submitting a final draft for Regional Council approval in April 2016.

Next Steps

In its proposed presentation of the draft 2016-21 economic strategy to the CPED Standing Committee in March 2016, municipal staff and Partnership representatives will report on the lessons learned from the

2011-16 economic strategy, as well as the economic progress made in Halifax while it was in force. This will conclude the Partnership's reporting to Council on its 2015-16 service level agreement commitments.

A new HRM-Partnership Service Level Agreement will be developed in 2016 that aligns with the new economic strategy.

FINANCIAL IMPLICATIONS

This report updates activities undertaken by municipal staff and Halifax Partnership to implement the Economic Strategy and by Halifax Partnership to fulfill the requirements of its Service Level Agreement. There are no financial implications arising from this report.

COMMUNITY ENGAGEMENT

There was no community engagement in the preparation of this report.

ENVIRONMENTAL IMPLICATIONS

There are no environmental implications to this report.

ALTERNATIVES

1. The Community Planning and Economic Development committee may request changes to the type of information included in the Economic Strategy Update report.

ATTACHMENTS

Attachment 1: Halifax Economic Report – January 2016

Attachment 2: SmartBusiness Quarterly Report – January 2016

Attachment 3: AGreaterHalifax – Economic Strategy 2011-2016: Actions for 2013 to 2016 – Q3 2015/2016 Report

Attachment 4: Service Level Agreement (SLA) between Halifax Partnership and HRM: Deliverables for 2015/2016

Attachment 5: Population, Employment and Commercial Tax Base Figures (Halifax, 2009-2015)

A copy of this report can be obtained online at http://www.halifax.ca/commcoun/index.php then choose the appropriate Community Council and meeting date, or by contacting the Office of the Municipal Clerk at 902.490.4210, or Fax 902.490.4208.

Report Prepared by: Jake Whalen, Senior Advisor, Economic Policy and Development – Government Relations & External Affairs, 902-490-3941

Report Approved by: Maggie MacDonald, Managing Director – Government Relations & External Affairs, 902-490-2349

Attachment 1

HALIFAX
PARTNERSHIP
CONNECT. COLLABORATE. PROSPER.

Halifax Economic Report

JANUARY 2016

Ryan MacLeod
Economist

Halifax Economic Report – January 2016

Highlights

- 2015 was a positive year for the Halifax economy, with broad-based growth across numerous sectors, including shipbuilding, construction, and the service sector.
- However, weaker-than-expected Labour Force Survey numbers in the fourth quarter softened the annual labour market numbers for 2015.
- In 2016, continued gains in manufacturing and construction and less drag from the natural gas sector will drive faster growth and a stronger labour market.

Current Economic Indicators for Halifax	Period	YTD 2014	YTD 2015	% Change
Labour Markets				
Real GDP at basic prices (2007 $ millions)	Annual	18,579	19,004(f)	2.3%
Population (Thousands)	Annual	414.4	419(f)	1.0%
Employment (Thousands)	Annual	223.3	224.1	0.4%
Unemployment rate (%)	Annual	6.1%	6.3%	0.2
Labour force (Thousands)	Annual	237.9	239.1	0.5%
Participation rate (%)	Annual	69.2%	68.6%	-0.6
Consumer Markets				
Average weekly earnings (Current $)	Jan-Nov	855	870	1.7%
Consumer price index (2002 = 100)	Jan-Nov	127.6	128.2	0.6
Retail sales (Current $ millions)	Jan-Oct	5,629	5,597	-0.6%
Aircraft Passengers (Thousands)	Annual	3,663	3,703	1.1%
Cruise ship passengers (Thousands)	Jan-Sept	130,048	141,515	8.8%
Containerized Cargo (Thousands TEUs)	Jan-Sept	307.6	305.3	-0.7%
Housing and Construction Markets				
Housing starts	Jan-Nov	1,614	2,546	57.7%
Housing resales	Jan-Nov	4,442	4,324	-2.7%
Value of building permits (Current $ millions)	Jan-Nov	621.4	659.4	6.1%
Non-residential construction (2007 $ millions)	Annual	313.3	378.2	20.7%

(f) - Forecasted Data

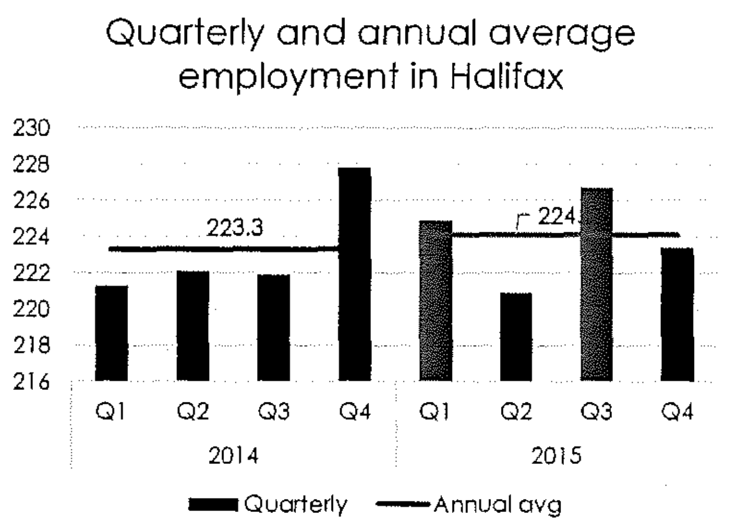
Sources: Statistics Canada, Canada Mortgage and Housing Corporation, Conference Board of Canada, Halifax International Airport Authority, Port of Halifax

2015 was a positive year for the Halifax economy, with the Conference Board projecting real GDP growth of 2.3% for the year, among the highest in Canada. This was supported in particular by the ramping-up-to and beginning of work at the Halifax Shipyard and robust multi-unit residential and non-residential construction sectors. However, on the downside, the switch to seasonal natural gas production at Deep Panuke led to a downgraded GDP forecast for 2015. As well, weaker-than-expected numbers from the Labour Force Survey in the fourth quarter (compared to a very strong Q4 in 2014) softened the annual labour market indicators compared to those reported in our October Economic Report. Looking forward to 2016, the Conference Board is projecting a pick-up in GDP growth to 3.0%, supported by the first full year of work at the Halifax Shipyard, continued strength in the construction and services sectors, and less drag from the natural gas sector.

Halifax Economic Report – January 2016

Construction was a strong economic driver in 2015, with healthy activity levels in both the residential and non-residential sector. On the residential side, year-to-date (YTD) housing starts were up 57% as of November, driven by historic levels of multi-unit construction. From January to November, construction began on 2,000 apartment-style units, the third-highest year on record and biggest since 1977. While construction of single-unit housing continued its multi-year slide, falling 20% YTD to November, residential investment remained strong in the province due to continued growth in renovation expenditures. On the non-residential side, investment has grown steadily through the year, with the annual value of construction growing 21% in 2015. Growth was driven in particular by commercial projects, including work on developments like the Nova Centre and expansions at Dartmouth Crossing. Strength in the construction sector is expected to continue in 2016. CMHC expects another big year for apartment construction, albeit not at this year's record high, and a slight pickup in single-detached housing starts. Non-residential construction should be supported by continued major project activity.

After a strong showing earlier in the year, labour market growth softened in the fourth quarter of 2015. This, in combination with a very strong fourth quarter in 2014, has led to weaker annual labour market numbers than were reported in previous quarters' Economic Report. Final employment numbers show only 0.4% growth in jobs for 2015, a notable downgrade from the 1.2% growth reported as of September. This matches growth in the labour force of 0.5% annually after showing YTD growth of 1.5% as of September. Through this however, the unemployment rate has remained relatively steady, averaging 6.3% for the year. Employment growth was concentrated in full-time work, with net gains of 3,600 jobs annually, while part-time employment fell by 2,000. The service sector was a growth driver, with the biggest gains in accommodation and food services (+1,700); professional services (+1,400); finance, insurance, and real estate (+1,400); and public administration (+1,300). Manufacturing began to see gains through the second half of the year as hiring and work began at the Halifax Shipyard. Looking forward to 2016, a faster pace of economic activity generally and the continued ramping up of work at the Halifax Shipyard is expected to drive faster employment growth and reduced unemployment.

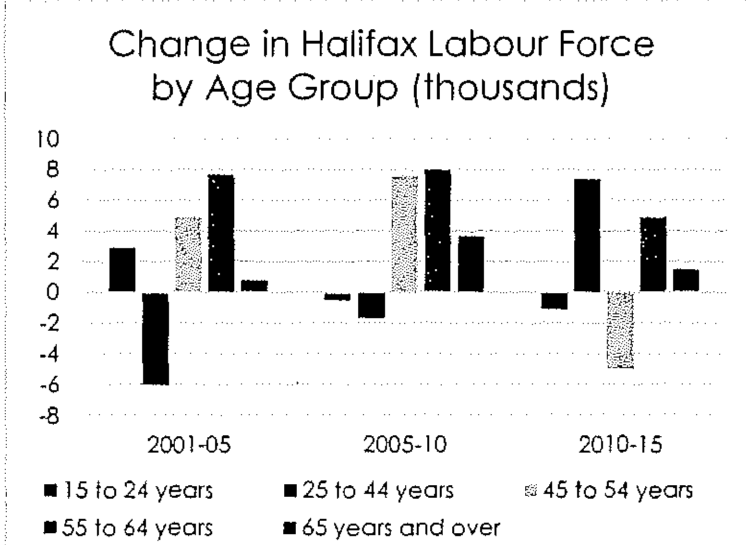


Turning to consumer markets, overall retail sales were down 0.6% YTD as of October, dragged down by much reduced gasoline sales receipts tied to the drop in oil and gasoline prices. However, non-gasoline retail sales were up 3.2% over the same time period. Consumer prices measured by the CPI grew by a very modest 0.6% YTD as of September, kept in check by the big drop in fuel prices. In 2016, retail sales should see a faster pace of growth, with gasoline sales stabilized and stronger employment growth driving more consumer demand.

Halifax Economic Report – January 2016

Aging in the Halifax Workforce

Population aging was a steady phenomenon through the second half of the 20th century but only became a topic of great concern in the 2000s, as the large cohort of baby boomers (born from 1946 to 1964) began to age beyond the "prime" working age group of 25 to 54 years old (so called because of its high rates of labour force participation and employment). As the boomers enter retirement, our workforce will tighten and greater pressure will build on those that remain to support a growing number of dependents.

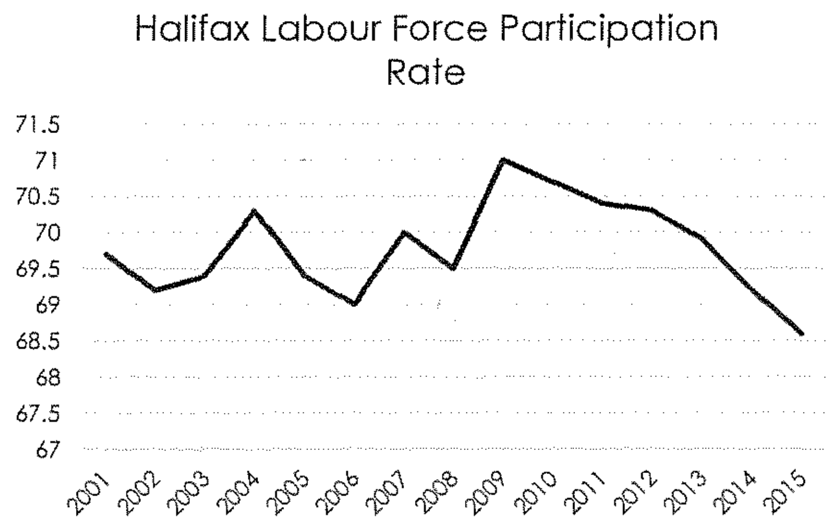


Nova Scotia has had one of the oldest and fastest aging populations in the country, exacerbated by outmigration of younger cohorts, which is expected to cause a significant tightening of its labour force over the next decade. This process has been slower in Halifax, roughly on pace with the national average.

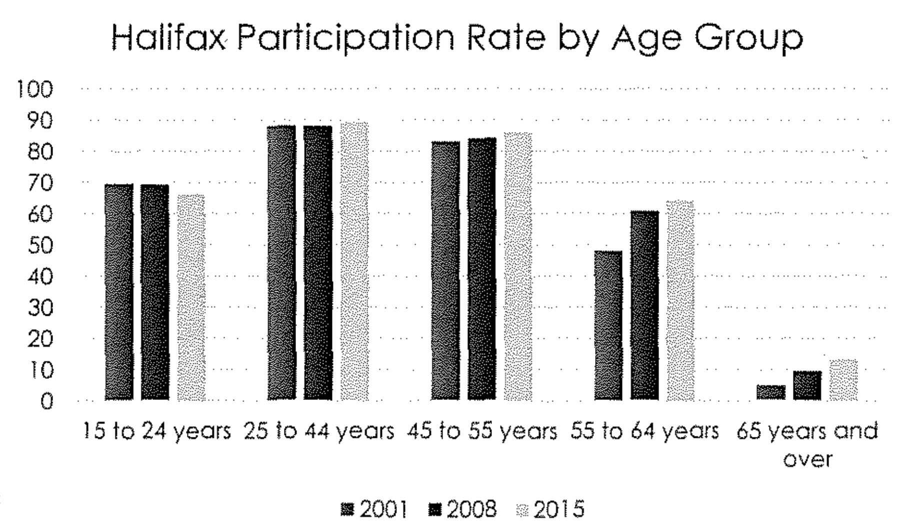
The chart above shows how age groups in the Halifax labour force have expanded and contracted over the past 15 years, as the baby boomers aged. From 2001 to 2005, the bulk of the boomers aged beyond 44, driving growth in the 45 to 64 age group, at the expense of the 25 to 44 age group. Through the later 2000s, that trend continued and expanded to the 65 plus category, though contraction of the 25 to 44 age group was limited by much higher immigration numbers. From 2010 on, the 45 to 54 age group has contracted, as the last of the boomers had reached age 55 or higher. Encouragingly, the 25 to 44 age group saw solid growth during that time as well, supported by higher migration rates and no longer suppressed by the mass exodus of the boomers. Nevertheless, over the 2001-2015 time period, Halifax saw 9.9% of its labour force shift from under the age of 55 to 55 or older. This was lower than the shift of 13.4% in the rest of the province and roughly equal to the national shift of 9.3%.

Change in Share of Total Labour Force			
Age	Halifax	NS excl. Hal.	Canada
15 - 24	-2.0	-2.1	-1.8
25 - 54	-7.8	-11.3	-7.5
55 - 64	7.5	9.7	6.9
65+	2.4	3.7	2.5

Ultimately, this matters because of the effect it has on our labour force participation rates. As baby boomers retire, our overall participation rate will fall. The ratio of retirees to workers will get larger, meaning each working person will, on average, be responsible to provide for a larger number of dependents, either directly or through taxes. This trend can already be seen in Halifax's participation rate, which has been in a steady slide since 2009.



On the positive side, average retirement ages have been on the rise, which has slowed the increase in the dependency ratio. Among workers aged 55 and over, participation rates have climbed steadily over the past 15 years, though rates still remain lower than among the prime age population.



Looking forward, population aging and the increase in the dependency ratio will likely continue for another 10-15 years, when the last of the baby boomers reach typical retirement age. The challenge for employers and governments in the meantime will be to find alternative means of meeting their labour needs – such as increased immigration, enhanced youth and immigrant retention measures, and increased investments in labour productivity improving technology – before that time comes.

The Halifax Partnership

The Halifax Partnership is Halifax's economic development organization. We help keep, grow and get business, talent and investment in Halifax. We do this through leadership on economic issues, our core programs, our partnerships across all sectors, and by marketing Halifax to the world.

If you have any questions or concerns about this document, its methodology, or how its indices are measured, please contact the Partnership at info@halifaxpartnership.com for further details.

Attachment 2

HALIFAX PARTNERSHIP | **SMARTBUSINESS** QUARTERLY REPORT

JANUARY 2016

One of the functions of the SmartBusiness program is to gather and identify information about the companies that it assists. This data is **not meant to show representative opinions** you would find from public polling. **This is a conversation with industry.** The data comes from the offices of business leaders, from frank discussions, and often times from outspoken honesty. It gets at 'private opinion,' the deeper held beliefs that businesses actually use to judge their community. SmartBusiness has undertaken the following activity this fiscal year (April to December):

- Retention Visits: 237 (165 SMEs, 45 HROs)
- Retentions: 1
- Expansions: 22
- Referrals Generated: 627
- Business Consultations: 341
- Jobs Created & Retained: 409+

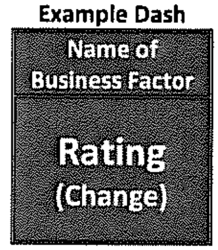
The data below represents findings from 286 interviews with clients between January 2015 and December 2016. SmartBusiness clients may not represent businesses in general, but represent a broad selection of industries and regions throughout Halifax. The current distribution oversamples rural businesses.

Executive Summary

- **Business confidence remains flat** – The share of local businesses that are confident in Halifax as a place to do business remains steady. 51.5% consider Halifax a Good or Excellent place to do business, compared to 52.2% in January last year. 54% of businesses noticed an improvement in the business climate and 80% predict Halifax will become an easier place to do business (vs 49% and 80% last January).
- **Rural businesses concerned with talent and representation** – Rural businesses in Halifax rate Workforce Quality lower than businesses overall (-18.8% vs +15.1%), and have similar issues with Workforce Availability (-28.4% vs -8.8%). They also consider these issues to be more important than their urban counterparts. Rural businesses have also expressed concerns that they are overlooked during conversations on rural issues, as they are often conflated with Halifax and its urban centre.
- **Businesses satisfied with education, transportation, some municipal services** – Among 8 municipal services and 23 business climate factors, business are most impressed with the performance of NSCC (+63.7%), Universities (+57.0%), Port Facilities (+54.3%), Air Access (+40.6%), and Public Water (+35.5%). Other positive mentions go to Shipping & Transportation, Police Protection, Public Sewer, Recreational/Cultural Amenities, and Economic Development Organizations.
- **Workforce issues remain a concern** – Halifax businesses have continued to downgrade their opinion of the local labour market as qualified talent becomes harder to find. Opinions have been declining over the past year on both Workforce Quality (down to +15.1% from +32.7% last January) and Workforce Availability (down to -8.8% from -1.4%). These two issues are interconnected as companies express dissatisfaction with the availability of certain skills, especially high-tech skills and point to outmigration.

Ratings and Scores

Example Dash

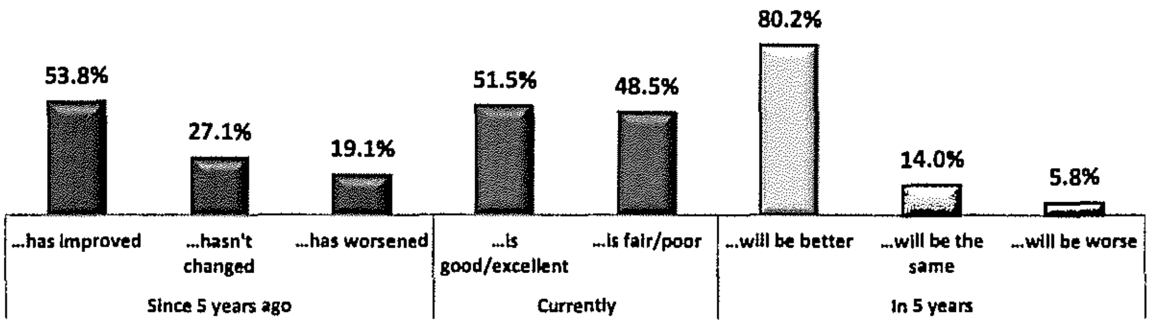


SmartBusiness collects information on 23 business climate factors and 8 municipal services. A dashboard has been compiled for each of these topics, providing at-a-glance data of private sector opinion on the business climate in Halifax.

Ratings of performance reflect an underlying score from -100 to +100, indicating how businesses rate particular issues (positively or negatively) and the strength of those opinions. Arrows indicate how much ratings rose/fell since last year. Companies are also asked to list the top-3 most important issues and top-3 most important services. Attention should be paid to boxes **highlighted in red**; more than 25% of companies consider these issues to be very important to their business.

Overall Business Climate

Businesses think the overall Halifax business climate...



Dashboards

Municipal Services

Public Water rises 17.9% – Police Protection falls 5.2%

Public Water	Municipal Bylaw Enforce.	Building Inspect & Permitting	Road Network/ Condition	Police Protection	Public Transportation
Excellent ↑↑↑	Good ↑↑	Fair ↑	Poor ↑↑↑	Excellent ↓↓	Fair ↓↓

Business ratings of Halifax's municipal services have improved significantly since last January, and especially over the last 9 months. In terms of performance public water, sewer, and police protection are among the highest rated services, considered Good or Excellent by a strong majority of businesses. When asked to rate the top-3 most important/relevant services to their business, they rated local roads (56%) and public transportation (45%) highest.

Labour & Education

Workers Compensation rises 27.4% – Workforce Quality falls 17.6%

Workforce Quality	Workforce Availability	P-12 Education	Universities	Community College	Workers Compensation
Good ↓↓↓	Fair ↓↓	Good ↑↑	Excellent ↓	Excellent ↓	Fair ↑↑↑

Local businesses of all stripes are concerned with finding qualified talent. While opinions of Halifax's Workforce Quality are mostly positive (+15.1%), opinions of Workforce Availability are mostly negative (-8.8%). As we look more towards rural areas, opinions of Workforce Quality decline more substantially as it is costlier to convince talent to move to rural areas. Universities and NSCC remain the highest rated business climate factors (+57.0% and +63.7% respectively), regardless of where businesses are located.

Infrastructure

Utility/Electricity rises 20.5% – Air Access falls 17.0%

Air Access	Port Facilities	Rail Services	Shipping and Transport	Provincial Highways	Utility/ Electricity
Excellent ↓↓↓	Excellent ↑↑	Fair ↑↑↑	Excellent ↑	Fair ↑↑↑	Fair ↑↑↑

Business opinions of transportation infrastructure are quite high and improving in areas such as Port facilities (up 5.6% from last January) and Shipping/Transport (similarly up 4.9%). Air access, while declining, remains very highly rated (+40.6%). Conversely while business opinions of Utility/Electricity are best improved (up 20.5% since last January), majority opinion remains negative (-22.4%).

Taxation & Regulation

Federal Gov. Regulation rises 15.0% – No taxation/regulation indicators fall

Municipal Gov. Regulation	Provincial Gov. Regulation	Federal Gov. Regulation	Municipal Tax Structure	Provincial Tax Structure	Federal Tax Structure
Fair ↑↑	Fair ↑↑	Fair ↑↑↑	Poor ↑↑	Poor ↑↑↑	Poor ↑↑↑

Improving relations between business and government is the breakout story of the year. Opinions of government regulation and taxation, while still mostly negative, have improved across the board. Ratings of performance on Municipal, Provincial, and Federal taxation have increased (by 7.6%, 12.3%, and 12.3% respectively) as have opinions around regulation (up 5.9%, 8.1%, and 15.0%). Ratings of importance for all of these factors are steady, though Provincial Taxation is a common concern for businesses. At each level of government, businesses rate taxation as slightly more important to their business than regulation, though this is especially true for the Province.

Miscellaneous

No miscellaneous indicators rise – Internet/Broadband falls 15.2%

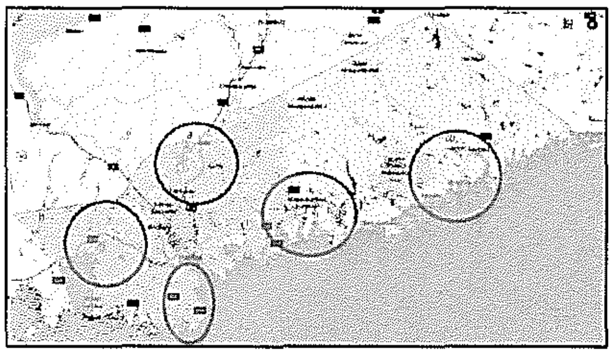
Economic Development Orgs.	Housing	Recreational/ Cultural Amenities	Phone/ Cell Phone	Internet/ Broadband
Good ↓	Good ↓↓↓	Good ↓↓	Fair ↓↓	Good ↓↓↓

Among these topics, the most noteworthy is business opinion of Internet/Broadband access which has declined significantly (down to +5.6%). As the SmartBusiness program services more and more rural businesses the rating has begun to fall. More information on this and rural businesses is available as part of the *Issue in Focus* (see below). While declining, business opinions of Economic Development Organizations (+24.4%), Recreational/Cultural Amenities (also +24.4%), and Housing (+12.4%) remain largely positive.

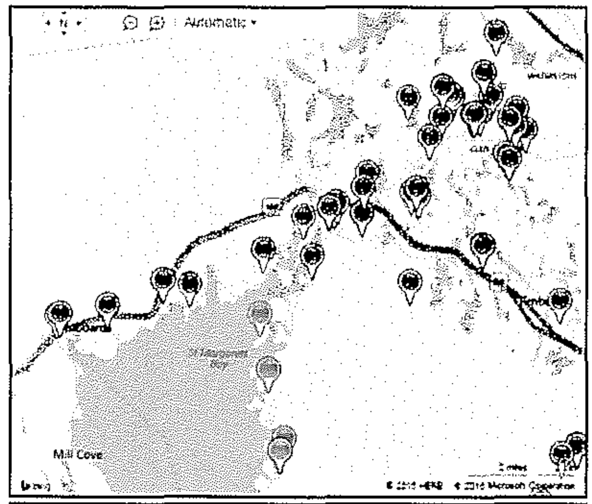
Issue in Focus – Rural Business Climate & Centres

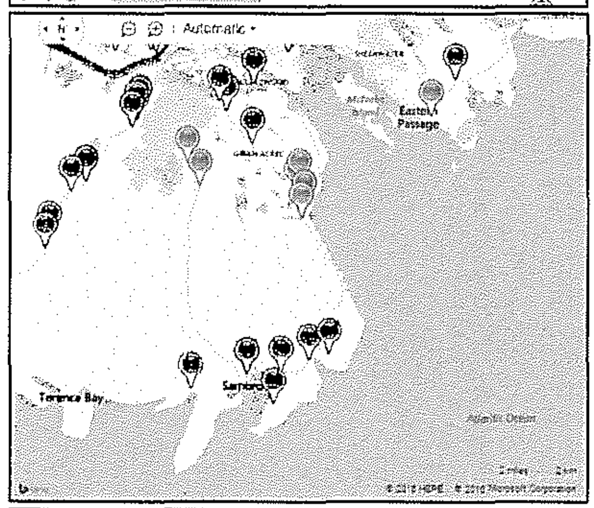
Despite the perception of Halifax as an urban centre, it is important to understand that the city of Halifax encompasses a massive rural area as well. In the latest Census, more than 83,000 individuals within Halifax lived in rural areas; over 20% of rural Nova Scotians. In fact, Halifax's is Nova Scotia's largest rural county, with a rural population double that of any other.

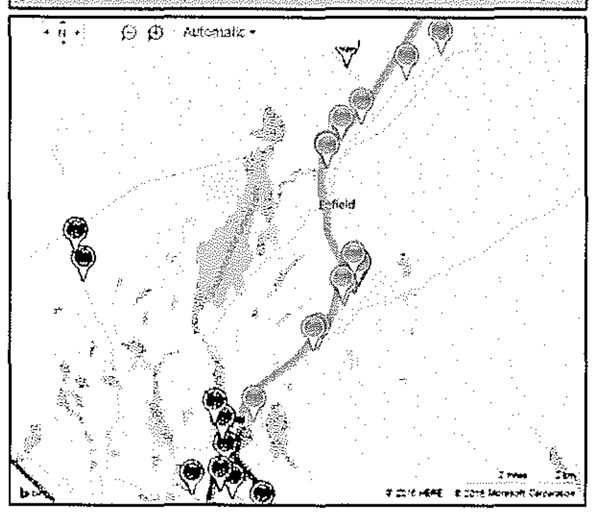
This also means that Halifax is home to many rural businesses. In particular, SmartBusiness data has identified five major rural centres within Halifax that have local groups of businesses. These groups can be found near Hammonds Plains, Sambro, Fall River (and Aerotech Park), Musquodoboit Harbour, and Sheet Harbour; maps are provided to more precisely specify each area:



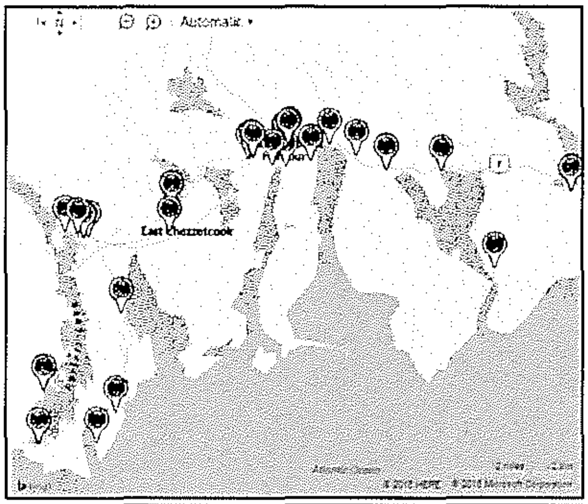
A common point of contention for these businesses is that they are often overlooked and under-represented. When discussions occur about the needs of rural Nova Scotia, communities within Halifax are looked over because of their attachment to the Halifax urban centre. Conversely, when discussions around urban areas occur, they find little value because their needs are not the same as an urban community. Key organizations have been advocating for and working with businesses in rural Halifax. The Partnership has worked with organizations such as the Sheet Harbour Chamber of Commerce, the Musquodoit Harbour and Area Chamber, and the Hammonds Plains Business Association, focusing SmartBusiness visitations and helping to identify companies in the area.

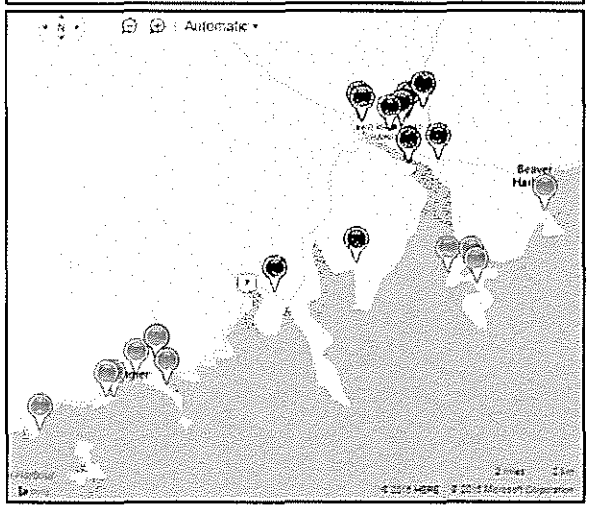






To best assist rural businesses, it is important to understand their needs and concerns. The following data represents the findings from a cross-section of rural businesses visited by SmartBusiness between January 1st, 2012 and December 31st, 2015. In all there are 143 visitations, with most occuring in 2015. Here are their findings:





In terms of their perspective on Halifax's strengths, both rural and urban businesses have similar views. Each group considers Halifax's key advantages to be the quality of its post-secondary institutions and a well developed transportation network.

Highest Rated Business Climate Factors		
Rural Halifax		Overall Halifax
Universities	1	Community College
Community College	2	Universities
Port Facilities	3	Port Facilities
Air Access	4	Air Access
Shipping & Transport	5	Shipping & Transport

When it comes to differences, rural businesses are much more concerned with finding and retaining qualified talent. When asked to choose the top-3 business climate factors which are most important to their business, rural companies rate Workforce Quality and Workforce Availability highest (32.1% and 33.0% respectively). Rural businesses also tend to rate their satisfaction with these factors much lower other businesses. The largest gap in opinion between rural/non-rural is in Workforce Quality.

Rating of Select Business Climate Factors		
Rural		Overall
-18.8%	Workforce Quality	+15.1%
-28.4%	Workforce Availability	-8.8%

Rural businesses have concerns over the state of Internet Access, which has become a more pressing topic recently. Looking solely at retention visits in 2015, rural areas rate Internet/Broadband access much lower than Halifax businesses overall (-24.5% vs +5.6%). 22% of these rural businesses rate their Internet Service Poor, with another 43% rating it Fair. Companies have had specific complaints about the ability to get reliable internet service in their area which has interfered with their ability to do business.

Rural businesses rate most business climate factors more poorly than their urban counterparts, but their views on Halifax's current economic conditions are similar: 52.1% of rural businesses consider Halifax a Good or Excellent place to do business, compared to 51.5% of overall firms. When comparing recent progress and optimism for the future, rural companies are more pessimistic. Only 42.2% (vs 53.8%) of rural businesses think Halifax's economy has improved and only 73.0% (vs 80.2%) of rural businesses predict the local economy will improve in the next 5 years.

Halifax Partnership

The Halifax Partnership is Halifax's economic development organization. We help keep, grow and get business, talent and investment. We do this through leadership on economic issues, our core programs, our partnerships across all sectors, and by marketing Halifax to the world.

If you have any questions or concerns about this document, its methodology, or how its indices are measured, please contact the Partnership at info@halifaxpartnership.com for further details.

Attachment 3

AGREATERHalifax
Economic Strategy 2011-2016

ACTIONS FOR 2013 to 2016

Vision

As the economic engine for the region, Halifax is a truly international city where people learn, work, easily start and grow a business, capitalize on ideas and live within a diverse, vibrant, sustainable community. Our vision represents a call to action. It defines our economic future. It defines the future of our city, an international city, a green city, a blue city, a proud and well-known city, a place where business thrives and a place where people want to live. This is our vision. This is Halifax.

Our success measures:

Grow the business tax base of Halifax -- retention and expansion of existing business and attraction of new business is essential for fiscal growth in HRM.
Grow employment and income levels in Halifax -- if we create good jobs at a livable wage, people will move and stay here.
Grow the population of Halifax -- growth in population and households is critical to the futre growth and prosperity of the whole region.

Measuring Outcomes:

The Partnership will use the % growth of the previous years from its benchmark cities to determine its targets for the upcoming year. Further, to limit the role of outliers (high growth or low growth) years, the Partnership will use the median (middle) value from its 5 benchmark cities to determine the target for the upcoming year. These results will be tracked in the Halifax Index, the Partnership's annual economic and community measurement tool, each year and the results will be presented at its annual State of the Economy Conference.

GOALS (5)	OBJECTIVES (17)	YEAR 3-5 ACTIONS (40)	YEAR 5 - STATUS UPDATES - Q3
	Direct and oversee a pro-development policy environment within the Regional Centre.	1. Continue to review HRM's regulatory processes and development fees to make private land development inside the Regional Centre more attractive.	• Consultation and amendments to improve processes regulated by the Subdivision By-law in progress. The staff report package for consideration is targeted for the February 18, 2016 meeting of CPED for their discussion and referral to Regional Council. • Through the 5 year review of the Downtown Halifax Plan, staff is recommending an expedited review process for small projects. Public consultation on the proposed amendments occurred on September 23, 2015. The full staff report package is targeted for Council's consideration in April 2016. • Development and construction permit fees to be reviewed and adjusted based on Planning & Development's organizational review and Regional Council direction. • Implementation of enhanced fee payment options to enable acceptance of credit cards for development and construction fees has been completed. Potential online payment capability continues to be investigated with the launch of ePost option by Finance and through the Web Transformation project.
		2. Provide density bonuses and site plan approvals as appropriate for increasing density in the Regional Centre.	Bill 83 was proclaimed in 2013, expanding Halifax Regional Municipality authority to use bonus zoning and other site planning tools to create compact, civic- inspired communities in the Regional Centre. To this end, a new Centre Plan is being developed. It entails the creation of a new Municipal Planning Strategy and Land Use Bylaw for the Halifax Peninsula and the areas of Dartmouth within the Circumferential Highway. Public consultations have taken place, and it is anticipated that a new policy will be created in 2016. In addition to application of these tools in new areas, the 5-year review of the Downtown Halifax plan provides an opportunity to refine the application of the tools in the Downtown Plan Area where they have been used for the past 5 years. The recently completed Density Bonusing study provided guidance for changes was shared with the public in Q2. Amendments to the Downtown Halifax and Dartmouth Policy will be advanced in Q4 and will implement new approaches to Density Bonusing in these areas and test viability for the approaches for use in the wider Regional Centre.
		3. Redesign the development approvals process, including consultation, to decrease limitations to urban development and to ensure efficient and effective feedback.	Report on updating public consultation processes was considered by CPED on January 21, 2016 and is being referred to Regional Council for direction. Development approval process improvements will be determined through Centre Plan exercise for the Regional Centre and P&D organizational review outcomes. All efforts will be taken to ensure uniformity in policy and practice throughout HRM. A review of planning application processes has been completed. An initial list of actions has been identified and programming and business process changes are underway. Implementation of administrative changes has begun and will be completed in 2016-17.

GOALS (5)	OBJECTIVES (17)	YEAR 3-5 ACTIONS (48)	YEAR 5 - STATUS UPDATES - Q3
REGIONAL CENTRE Build a vibrant and attractive Regional Centre that attracts $1.5B of private investment and 8,000 more residents by 2016.	Further the livability and attractiveness of our urban core.	1. Raise awareness of the availability of parking in the regional centre in alignment with the HRM Parking Strategy.	The Parking Roadmap has been completed and year-one implementation is underway. The Muncipality is working with Regional Centre Business Improvement Districts and Waterfront Development to improve access to parking information through co-ordination of payment technologies and development of a common branding strategy. Replacement of enforcement technology is underway and opportunity assessment of payment technology changes will be completed in March 2016.
		2. Develop a 5 year intergovernmental capital improvement campaign to repair and enhance the public realm in the Urban Core and establish an ongoing dedicated strategic urban reserve fund for Urban Core beautification & infrastructure improvements.	On July 21, 2015 Halifax Regional Council: • Directed staff to develop a new list of Building Canada Fund (BCF) projects for Council's consideration to submit once final decisions are made on the existing submissions (it is expected that approved funds for the existing project list will cover the current fiscal year up until 2017-18); • Rescinded the February 11, 2014 Council motion to "Commit to a $50 Million program, contingent upon other levels of government funding with one-third municipal contribution of $17 million spread evenly over 5 years, beginning in fiscal year 2014-15; • Directed staff to develop business cases with funding from account no. CD000002 – Downtown Streetscapes – Capital Improvement Campaign for the Argyle Street and Spring Garden Road streetscaping projects, including detailed project scope, timelines, cost estimates, and funding strategy. Staff will return to Council for approval to proceed; and • Directed staff to prepare and return to Council with a long-term Streetscapes Capital Improvement Plan, including a list of remaining urban core public realm improvement projects with an estimated project scope, timeline, and cost estimate for each project, and funding strategies including potential partnering opportunities for each project. Staff has since released an RFP seeking consulting design support for the Argyle Street project. The initial phases of this project will allow for completion of a Business Case for both Argyle Street and Spring Garden Road projects. These business cases will be complete in Q4 and be brought to council for consideration.
		3. Assess HRM's role in district heating and cooling.	The district heating and cooling proponent withdrew the proposal and the file is no longer active.
		4. Incorporate into the Cogswell redevelopment plan the economic strategy regional centre objectives.	The technical analysis and land plan was presented to Regional Council in April 2015, and approval was given to move forward with the redevelopment of the Cogswell Interchange. The demolition and reconstruction of the Cogswell Lands is estimated to be a 4 year project. The development of the lands, including land use by – law (LUB) planning and real estate marketing will occur over an additional 4 to 5 years. The Project Director started in Septemer 2015. Longer term office space for the project team has been identified. Secondment opportunities and administrative support for the PO are the next items to be delivered. A basic Work Schedule has been created. As the designers and consultants are brought onboard, this document will grow in both content and detail as the Cogswell design is expanded and vetted by an ever larger group of project professionals. A Procurement Plan has been compiled which details the RFP strategy and requirements for each of the consultancy services as well as the pertinent timelines for each of these functions which is summarized in the Procurement Schedule document. The first RFP for Fairness Monitoring services closed on Jan 26, 2016. The overall program budget of $64,250,000 has been reviewed and allocated by category and indicates cash flow for capital expenditures through to the end of 2020. The engagement of a professional Cost Consultant will provide cost certainty as the design progresses through 30, 60 and 90% Design Development. Project cost will be frequently reassessed as the design development progresses with a final budget being presented to council prior to engaging construction services. Numerous internal HRM stakeholders will contribute to key areas of design requirements to ensure the program is understood by the Prime Design Consultant. The internal stakeholders will have varying levels of initial, ongoing and advisory capacity levels of inputs as the program progresses through Pre-Design award and Design Development. Considerable efforts have additionally been extended in order to introduce the Cogswell team to a wide ranging group of external stakeholders. Initial meetings with these organizations have already occurred and subsequent follow-up meetings to better understand the stakeholder concerns and requirements will continue as the Prime Design Consultant is on-boarded and Design Development progresses.

GOALS (5)	OBJECTIVES (17)	YEAR 3-5 ACTIONS (48)	YEAR 5 - STATUS UPDATES - Q3
		5. Work with federal and provincial government to explore development opportunities for vacant public and private lands in the regional centre for cultural institutions, public spaces and private mixed uses.	Recent focus has been on the development of the Cogswell lands as reported on above.
	Reinvent the current approach to mobility in the Regional Centre.	1. Implement the active transportation plan with a priority placed on Regional Centre bike lanes.	The 2014-19 Active Transportation Priorities Plan was approved by Regional Council in September 2014. • The Hollis Street bike lane opened in September 2015. • The Highfield Park Drive Greenway opened in August 2015. • The Windsor Street to Quingate bike connection opened in August 2015. • The Bridge connection from Chain of Lakes Trail to Crown Drive was completed in November 2015. • Design work has been completed on a multi-use overpass of the CN main line between Pine Hill Drive and Saint Mary's University. • HRM is working with Dalhousie to install a separated bike lane on University Avenue. • Design work is proceeding on new sections of the Dartmouth Waterfront Greenway and the Canal Greenway. • Design work is underway for improved connections to the Macdonald Bridge bikeway.
		2. Create a new transportation model that conveniently connects goods with their destinations while not interfering with residents' safe enjoyment of the Urban Core.	The Integrated Mobility Plan will examine long-term strategic opportunities and make comprehensive recommendations to integrate future mobility investments with land use planning. The Plan is scheduled for completion in December 2016.
		3. Ensure the 5 year strategic framework for transit supports growth in the Regional Centre.	The Draft Halifax Transit Moving Forward Together Plan was released to the public on February 17, 2015 and comments on the draft from both the public and stakeholders were collected until April 24th. It is anticipated that a proposed final draft of the Moving Forward Together Plan will be before Transportation Standing Committee in March 2016. The proposed future transit network has been designed to provide increased sustainable mobility to and within the Regional Centre.
	Celebrate and enable a rich variety of cultural	1. Enable public investment for cultural institutions and public gathering spaces, informed by municipal cultural investment study being undertaken and HRM's Regional Plan review.	New public art pieces were unveiled at the Central Library, Canada Games Centre and Dartmouth Bridge Transit Terminal. Regional Council approved the $300,000 in grant funding for Professional Art Organizations during the 2014/15 fiscal year and increased the total amount to $360,000 for the 2015/16 fiscal year. That funding was allocated by Regional Council to 20 professional arts organizations for operating assistance and 15 organization for project assistance in June 2015. The application process for 2016/17 will be open in February and March pursuant to the Administrative Order, with funding allocated once HRM's operating budget is approved. The 2014 Regional Plan endorsed the development of a Greenbelting and Public Spaces Priorities Plan and a Culture and Heritage Priorities Plan which will map existing resources and develop priorities for future investment. These plans will create the necessary policies, programs and budgets to further the priorities developed in consultation with stakeholders and citizens and endorsed by the Halifax Council. Greenbelting and Public Spaces Priorities Plan was renamed Halifax Green Network Plan and Phase 1 was presented to Regional Council in Fall 2015.

GOALS (5)	OBJECTIVES (17)	YEAR 3-5 ACTIONS (48)	YEAR 5 - STATUS UPDATES - Q3
	and creative opportunities in the Regional Centre.	2. Make available regional centre municipal public spaces for public art, cultural and educational programs.	HRM public spaces in the Regional Centre are regularly available for programming and public art. Public art and monuments are located along both the Halifax and Dartmouth waterfronts and at other locations within the Regional Centre, including Grand Parade and Granville Mall. These locations are also frequently used for cultural and civic event programming such as Nocturne, Canada Day, Moosehead celebration and Natal Day. Equitable and increased access to municipal spaces for cultural activities will be addressed in upcoming region-wide plans, such as the Community Facility Master Plan, The Greenbelting and Public Spaces Priorities Plan and The Culture and Heritage Priorities Plan.
		3. Create an inventory of cultural institutions, events and programs in the Regional Centre.	Mapping of cultural institutions and social heritage resources (includes events and traditional practices) will be part of the inventory phase of the Culture and Heritage Priorities Plan. The creation of the overall inventory of cultural institutions, events and programs is part of the Culture and Heritage Priorities Plan of the Regional Plan. In addition, Regional Council recently requested a Cultural Spaces Inventory which will be aligned with work on the Cultural and Heritage Priorities Plan.
	Reduce regulatory, tax and policy issues that can inhibit development and investment.	1. Identify opportunities to streamline regulatory requirements or processes through work with Service Nova Scotia and Municipal Relations on the Access to Business project.	The provincial government has redesigned and re-launched the Access to Business website.
		2. Benchmark development charges, fees and timelines against those in other comparable jurisdictions.	Development-related application fees will be reviewed and adjusted based on Planning & Development's organizational review and Regional Council direction. Initial comparison of fee structures in other jurisdictions has been completed. Initial process mapping and durations has been prepared and internal discussions are being held to understand how fees align with current processes, as well as to explore potential fee-for-service models and identify process efficiencies. The review is anticipated to be finalized in Q4.
		3. Continue to research and benchmark HRM's tax competitiveness against other municipalities.	Work with the City of Calgary on residential benchmarking is on-going. Comparisons of 2014 single-family home taxes has been completed and the resulting average tax chart has been provided to Regional Council in 2016-17 budget development presentations. In September 2015, HRM Finance (with the Altus Group) completed its commercial taxation benchmarking project to compare rents and property taxes for office and industrial spaces in 20 cities across Canada and the eastern seaboard of the United States. These results have also been reported to Regional Council.
	Create a service oriented culture within HRM that supports the business community's need for competitiveness, growth and responsiveness.	1. Work with Service Nova Scotia and Municipal Relations to include some transactions with HRM through the Access to Business portal.	Provincial government has redisgned and relaunched Access to Business website.
		2. Leverage GHP's Business Retention and Expansion Program to collect input from businesses from various sources and formalize a feedback mechanism to HRM in order to inform business planning and decision making as recommended in the Auditor General's report on Economic Development through Partnerships.	Results from the Partnership's SmartBusiness Program are shared quarterly with Halifax Government Relations and External Affairs Division, CPED, Regional Council and the Office of the CAO. Company common issues specific to Municipal services are identified and shared within this report.

GOALS (5)	OBJECTIVES (17)	YEAR 3-5 ACTIONS (48)	YEAR 5 - STATUS UPDATES - Q3
		3. Review and analyse available data (inlcuding BRE data, general research) to understand which municipal service delivery issues are the most important to business.	The 2015-16 SmartBusiness Q3 Report is attached.
	Develop a responsive, safe, integrated regional transportation system.	1. Investigate models, complete a best practices review and define the business case for a Regional Transportation Authority.	The Strategic Joint Regional Transportation Committee undertook stakeholder survey and best practices review and determined that no obvious benefit exists at this time to warrant a change in transportation governance.
BUSINESS CLIMATE Promote a business climate that drives and sustains growth by improving competitiveness and by leveraging our strengths.	Focus on quality of place including the need for civic engagement, public investment and initiatives to increase social capital.	1. Consult with community and business stakeholders and develop a long term (20 year) strategic approach to infrastructure investment.	Capital planning cycle has been increased from a five-year cycle to a ten-year cycle. Asset management program will develop 20-year recapitalization/renewal plans. This base information will inform a longer-term strategic approach.
		2. Continue to track "Quality of Place" measurements in the Halifax Index.	Quality of Life Measures are included in the Halifax Index. Details and copies can be found at http://www.halifaxpartnership.com/en/home/economic-data-reports/halifax-index/default.aspx The 4th Annual Halifax Index was presented in June 2015.
	Halifax is recognized internationally for its clean and healthy environment.	1. Undertake actions in support of HRM's priority to be a leader in environment and sustainability initiatives.	The Solar City pilot project is complete and the final report was submitted to the Federation of Canadian Municipalities in September 2015 for disbursement of the loan and grant to HRM. In March 2015, Regional Council approved a three-year program, Solar City 2.0, looking at solar air and photovoltaic in addition to solar hot water. Design of this new municipal program is underway and anticipated to launch this spring. Solar photovoltaic projects are complete at the West Street Fire Station, Northbrook Training Centre, Alderney Gate, and the Chocolate Lake Washrooms. A solar wall was installed at the Dartmouth Sportsplex for space heating. The Community Energy Plan update is underway. Public engagement is complete, and the plan is being revised to target implementation in Spring 2016. The municipality disclosed corporate and community emissions and climate change actions to the Carbon Disclosure Project in 2015. Mayor Savage signed on to the Compact of Mayors in September 2015, showing support and commitment to reducing greenhouse gas emissions in the lead up to Paris COP 21 climate negotiations in December 2015. A revised calculation of HRM's corporate greenhouse gas emissions for fiscal 14/15 is underway and will be reported to the Carbon Disclosure Project as well as the Partnership for Climate Protection administered by the Federation of Canadian Municipalities. Watershed studies have been completed in Sandy Lake, Preston, Tantallon, Musquodoboit, Lake Echo and Porters Lake. A floodplain study of the Sackville and Little Sackville rivers is underway. The first phase of the study is complete and the second phase will begin this winter. The pilot program to harvest weeds from Lakes MicMac and Banook is complete, and a multi-year program has been launched. Thirty-eight rivers and lakes continue to be monitored to assess watershed health in HRM, along with water quality monitoring studies specific to Development Agreements and lifeguarded beaches. Work continues to incorporate environmental risk management into municipal operations. A detailed inventory of HRM's oil tanks is complete, and a working group is being formed to address outstanding risks. HRM is considering purchasing tank insurance for all insurable tanks. Climate adaptation and resiliency projects are underway to increase community resiliency in HRM, including economic studies, a policy exchange program with the European Union (Halifax is partnered with Tallinn, Estonia), and collaboration with HRM's Emergency Management Organization.

GOALS (5)	OBJECTIVES (17)	YEAR 3-5 ACTIONS (48)	YEAR 5 - STATUS UPDATES - Q3
	Increase the engagement and active support of the private sector in the economic growth of Halifax.	1. Develop and launch a campaign to raise awareness and increase engagement of the business community in the economic growth priorities of Halifax.	The Partnership markets and promotes Halifax as a location of choice for business by raising local confidence and both the national and international profile of Halifax. This is accomplished through online, print, radio, media, and events promoting HRM as an attractive community to live, work and conduct business. Results compared to year-end 2014-15 are: • 19% increase in total social media followers; • 18% increase in Twitter followers; • 20% increase increase in facebook page likes; • 25% increase in LinkedIn group members; and, • 27, 068 total website users. The following are highlights of activities in Q3 related to the Mayor's Celebrate Business Program and the Partnership's investment attraction initiatives: - October 8 – Mayor's Celebrate Business Visit to Clearpicture - October 22 - Mayor's Celebrate Business Visit to Lixar IT - October 25-28 - Mayor Savage attended the WECP 20th AGM held in Rio de Janeiro. - November 17 – Mayor's event to launch the Halifax Partnership's Game Changers Action Plan focused on retaining young talent in Halifax - November 20 - Mayor's Celebrate Business Visit with Exact Deposit - November 25 – Attended the Cox and Palmer reception to recognize Mayor Savage appointment as new President of the WECP - December 3 -5 – Boston Tree Lighting and Business Meetings - December 3 meeting with Yeloha in Boston to discuss Halifax's Solar City initiative and potential business opportunities - December 3 – Meting with Lisauskas in Boston to discuss business opportunities related to waste management - December 4 – attended Boston Tree Lighting - December 4 - Meting with David Alward, Consul General of Canada for New England - December 4 – Meeting with TD with Premier MacNeil and Emera to discuss the energy sector in the Maritimes - December 5 – Meeting with Accelerator in Cambridge Mass. - December 11 – Mayor attended the presentation of the Partnership's Connector Program and Halifax's Economic Strategy to the Halifax Higher Education Partnership (HHEP) regarding youth retention and experiential learning.
		2. Increase private sector investment in economic growth and ensure strong representation and participation in the implementation of the Economic Strategy.	As of March 31, there are 124 active investors in the Partnership (96% renewal rate). There were 15 new investors (13% increase). The new investors are: Lockheed Martin, BDO, Cisco, I.H. Mathers, IBM, Lois Lane Communications, Hilton/Silverbirch, Journeyman Films, Right Some Good, Revolve, Scotian Materials, Word Right Career & HR Consulting, Napkin Creative, Value Improvement Consulting and eOlio. Non-renewals for the year are: Collins Barrow, Doctors NS, Shell Canada and Rogers.
		1. Advocate for Federal and Provincial labour market programming that aligns with the needs of the Halifax business community.	The Halifax Partnership is a member of: - Province's Workforce of the Future Table (completed its work in December); - LIP (Local Immigrant Partnership) Advisory Council; - LIP Economic Integration & Growth sub-committee; and, - Advisory Committee convened by Students NS for the planning of the Nova Scotia Youth Employer Awards. The Partnership also particpated in and/or presented to more than 10 sessions focused on increasing opportunities for youth and/or newcomer attraction and retention and settlement improvements. In September 2015, GHP co-sponsored the Mayor's Welcome Reception for first-year international students to Halifax.

GOALS (5)	OBJECTIVES (17)	YEAR 3-5 ACTIONS (48)	YEAR 5 - STATUS UPDATES - Q3
	Maximize opportunities for increased alignment, awareness and engagement of the business community in the implementation of the Province's workforce strategy (JobsHERE).	2. Help businesses achieve best practices in employee recruitment and retention by: - connecting the business community to labour market information and human resource management support, and - increasing business community's participation in labour market initiatives to attract and retain young professionals and international skilled workers.	Through its Business Retention and Expansion Program, the Partnership provides information to clients regarding best practices in employee recruitment and retention. One example of support is connecting clients to the Workforce Development resources available on the business.novascotia.ca website. Examples include: • NS HR Toolkit - provides valuable human resource information, downloadable tools and templates, and links to programs and resources to support managers with their human resource needs. • SkillsonlineNS - This tool promotes a practice of learning in the workplace, providing quick and easy access to thousands of online courses suitable to staff at every level of the organizations. • Welcoming Workplaces - supports businesses be more inclusive and welcoming. The workbook includes a business diversity self-assessment, practical advice and strategies and ready-to-use forms and templates to help employers make diversity a part of their strategic business goals. The Partnership has presented the benefits of being a Connector to various community organizations, universities, government departments, etc. Q1-Q3 RESULTS 2015 are: Participants TOTAL = 305 • Immigrants = 95 • Int'l grads = 95 • Local grads = 87 • Speed interviews = 28 • New connectors = 81 Jobs Found TOTAL = 142 • Immigrants = 43 • Int'l grads = 47 • Local grads = 48 •Speed interviews = 4 Program totals to December 31st, 2015:
		3. Increase the engagement of the business community to provide information and input on current and future labour market needs to partners to ensure programs respond to current business needs.	The Halifax Partnership also assisted the OneNS Coalition by providing background research, commentary, and analysis on Youth Retention in the province. Worked closely with an internal group to draft a discussion document for broader community involvement.

GOALS (5)	OBJECTIVES (17)	YEAR 3-5 ACTIONS (48)	YEAR 5 - STATUS UPDATES - Q3
TALENT Create a welcoming community where the world's talent can find great opportunities, engaged employers and resources for career advancement.		1. Review HRM policies, strategies, facilities and programs to ensure they are inclusive of diverse communities.	The African Nova Scotian Affairs Integration Office (ANSAIO) collaborated with Human Resources and Racially Visible Employees Caucus (RVEC) to select Turner Consulting to conduct an Employment System Review (ESR) within the former Municipal Operations division of Public Works and Transportation. The ESR has now been completed, and has provided HRM with an in-depth assessment of employment practices and policies regarding the effectiveness of the municipality's Employment Equity Program and Employment Equity Policy. The Final Report has been completed and results presented to the Steering Committee.An Action Plan will be developed in response to the recommendations. ANSAIO is working with HRM Recreation Planning Specialist to coordinate a focus group of African Nova Scotian community organization representatives in October 2015 to provide feedback on their communities' recreation facility needs in connection to the Community Facility Master Plan. ANSAIO provided support for the Solar City 2 project through the Manager of Energy and Environment by engaging the Black Business Initiative and ADEPA to explore measures for African Nova Scotian business owners to compete more equitably in the RFP process and gain contracts to be involved in this project. ANSAIO is working with FICT designates to support the Land Titles Clarification Initiative of the province and to advise on strategies through specific programs to ameliorate the issue of outstanding land taxes affecting targeted African Nova Scotian residents in the Preston areas. ANSAIO continues to liaise with external partners including the province's African Nova Scotian Affairs Office (ANSA) and the Nova Scotia Barrister's Society to organize community engagement support between the municipality, the province and the Preston communities involved. ANSAIO organized a focus group for African Nova Scotians to provide feedback on the HRM Community Facilities Plan on October 22nd at the Dartmouth North Community Centre.
		2. To identify workforce matters of common interest with the First Nations community in HRM to maximize employment outcomes. The work will begin through establishing a partnership with the Mi'kmaq Friendship Centre and focus on opportunities to increase employment representation for Aboriginal people.	Human Resources last met with representatives from the Mi'kmaw Native Friendship Centre in January 2015 to explore collaborative opportunities.

GOALS (5)	OBJECTIVES (17)	YEAR 3-5 ACTIONS (48)	YEAR 5 - STATUS UPDATES - Q3
	Build a welcoming and inclusive environment for underrepresented groups.	3. Create a function within HRM that will work to improve the quality and level of service to residents and communities of African descent as it relates to employment.	The African Nova Scotian Affairs Integration Office (ANSAIO) hosted a Youth Leadership Forum on October 20th at the Central Halifax Library under the theme, "Youth - Leading the Change". This event was planned in collaboration with HRM Parks and Recreation staff, Halifax Regional School Board, Halifax Libraries and volunteers from the African Nova Scotian community. Over 60 youth attended and participated in workshops focused on enhancing leadership and employability skills to better prepare and encourage ANS youth to take on leadership roles in their community and our municipality as whole. ANSAIO continues to lead the development of the African Nova Scotian and Visible Minority Women's Network employee group to enhance talent development, diversity of the workforce, and employee retention within HRM. A December meeting was held under the theme, "Lifting Stones, Moving Mountain: Setting Goals" to focus on the importance of goalsetting to professional development. ANSAIO continues to provide support to the Racially Employee Caucus(RVEC) through presence at their meetings and offering assistance in addressing employment and career advancement issues within the HRM structure. ANSAIO provided a workshop on" Goal Setting" for RVEC members in October and is working with RVEC to offer more opportunities for employment skill enhancement and development. ANSAIO has held two Community Circles focused on employment with HRM in the North End Halifax on October 25th at the George Dixon Centre and November 25th in partnership with the YMCA Enterprise Centre of Halifax for one of them. ANSAIO provided information to residents of African descent on HRM business units, types of job opportunities, how to find and apply for HRM jobs and collected data from attendees on barriers faced by ANSs in accessing employment with HRM.
		4. Explore new opportunities for underrepresented groups, like youth, to link to employment opportunities.	The Halifax Partnership and its partners launched the Game Changers Action Plan on November 17, 2015, a three initiative aimed at retaining young talent in Halifax (www.halifaxgamechangers.com). Over 200 private and public sector leaders attended the launch hosted by Mayor Savage and the Halifax Partnership. The Game Changers initiative is based on the Partnership's Youth Retention study released in October 2015 which found that each year on net, Nova Scotia loses 1,300 young people between the ages of 20 and 29. Over the next three years, the Partnership will work with the business community to achieve the following goals: • 800 net loss of youth 20-29 in year one • 400 net loss in year two • 0 net loss in year three The Game Changers initiative includes: • Leveraging the Partnership's SmartBusiness and Connector programs to connect businesses to the resources they need to hire young talent • Raising awareness about the youth retention issue and encouraging businesses to hire through a multi-media advertising campaign • Research to inform youth employment policies and programs • Hosting events which showcases young talent in Halifax and celebrates employers who hire young talent The Mayor's Welcome Reception for First Year International Students was hosted at Pier 21 (cosponsored by the Halifax Partnership). More than 200 students attended the event from Halifax's universities and community colleges. The Local Immigration Partnership (LIP) was officially launched in September to help facilitate immigrant settlement, integration and retention. LIP will create/identify opportunities for cross-sector collaboration among newcomer service providers. The African Nova Scotian Affairs Integration Office (ANSAIO) has held two Community Circles focused on employment with HRM in the North End Halifax on October 25th at the George Dixon Centre and November 25th in partnership with the YMCA Enterprise Centre of Halifax for one of them. ANSAIO provided information to residents of African descent on HRM business units, types of job opportunities, how to find and apply for HRM jobs and collected data from attendees on barriers faced by ANSs in accessing employment with HRM./ANSAIO is also participating in plans with other African Nova Scotian women and the Nova Scotia Status of Women Advisory Council on strategies to improve the presence of African Nova Scotian women in positions of leadership and authority in public and private sectors of society. Jan 2015 - The African Nova Scotian and visible minority Women Network is active and a career development event was recently held for this group. Bridging the Gap Internship Program is going strong with the 2nd
	HRM will become an "Employer of Choice" serving as a model for the business community.	5. Implement the HRMPeople Plan.	A refresh of the People Plan was completed for 2015-2016. The development of the next multi-year plan for the organization is underway and will incorporate the strategic priorities identified through consultations conducted with business units.
			On November 26, 2013 - Halifax Regional Council unanimously passed the motion to award the HRM Rebranding Project to the successful proponent Revolve Branding Inc. GHP co-lead the project with HRM. Public

GOALS (5)	OBJECTIVES (17)	YEAR 3-5 ACTIONS (48)	YEAR 5 - STATUS UPDATES - Q3
Create a unique international city brand for Halifax.	Create a unique international city brand for Halifax that reflects our best qualities and what we aspire to be.	1. Develop a Brand Strategy and Implementation Plan.	engagement sessions, stakeholder sessions, and telephone interviews (residents and non-residents) were conducted from December 2013 to March 2014. Over 20,000 residents contributed to the engagement process. On April 15, 2014 - Regional Council approved the brand strategy for the Halifax region, giving staff the green light to start implementing the strategy and to encourage people to live and promote the brand promise to "Be Bold."
		2. Ensure necessary buy-in and adoption from citizens, the business community and key organizations that will have a role in the brand strategy implementation.	The launch of the brand included the website www.Halifaxdefined.ca, this website is a showcase for the new brand an outlines how the new brand was chosen and what the new brand means to the community. The city is rolling out the brand in a systematic way. Buses are being re-painted and community signs are being replaced with the new brand. This goes a long way to acheive community buy-in. The Greater Halifax Partnership changed its name to Halifax Partnership and is now aligned to the new Halifax brand.
	Move Halifax from Good to Great – Live the brand!	3. Implement the Brand Strategy that: - Provides clear and consistent messages to a local, national and international marketplace; - Supports trade, investment and labour market development; - Increases the number of businesses actively seeking customers in international markets; - Builds business and citizen confidence locally; and, - Inspires a culture that guarantees Halifax's delivery of an exceptional experience.	In December of 2014, the Partnership rebranded to align to the new Halifax brand. It is continuing to actively promote the Halifax brand locally, nationally and internationally through activities such as: -membership with the Consider Canada City Alliance; -Halifax's International Partnerships with Aberdeen, Scotland and Norfolk, Virginia; -World Energy Cities Partnership; -updated investment attraction marketing collateral; -shared news and updates from the municipality; and, -the Mayor's Celebrate Business Program.
	Support and validate the implementation of the economic strategy through an enhanced research capacity.	1. Implement the Partnership's BRE Program focused on connecting Halifax businesses to the resources and services they need to be more competitive, at home, across the country and internationally.	Q1 to Q3: - 237 SmartBusiness retention visits (diagnostic surveys); - 341 business follow-up consultations; - more than 40 face-to-face meetings with action team members YTD; - 627 business referrals generated (53% successfully closed); and, - 409+ jobs created & retained.
		2. Present the Halifax Index at the Annual State of the Economy Conference. The Index tracks yearly progress on economic, environmental and social objectives and recommends ideas for improvement.	The Partnership presented the 4th Halifax Index in June 2015. Details and copies can be found at http://www.halifaxindex.com

GOALS (5)	OBJECTIVES (17)	YEAR 3-5 ACTIONS (48)	YEAR 5 - STATUS UPDATES - Q3
		1. Mobilize community stakeholders to collectively respond to and/or support immediate threats and opportunities.	The Partnership continues to work with oceans sector partners - NSBI, NSCC, Waterfront Development Corp., Dalhousie University, Halifax Gateway Council, Journeymen and OTCNS - to collaboratively market Nova Scotia's Ocean Sector. Partners are working to develop a new film showcasing Nova Scotia's leadership and assets in ocean research and commercialiation. The film will be launched during Oceans Week in June. Partners are also working to develop a cohesive brand to market the province's ocean sector and to position Halifax as Canada's Ocean City. Visit oceaninnovators.com for a showcase of the city's ocean sector marketing assets. The Halifax Partnership hosted several events to mobilize community stakeholders including: -April 27- EU Luncheon with EU Trade Delegate to discuss the impact of CETA for businesses in Atlantic Canada - April 30th- Let's Talk Exports Event - June 15th -Aberdeen Reception - June 16th - EngageNS Stepping Up - June 25th - AGM/Halifax Index Launch - Sept 15th - Virginia Economic Develoment Partnership Reception - Nov 17th - Game Changer launch - Nov 24th- Investor Briefing on the Economic Strategy In addition to these events, the Partnership hosted the following events to create awareness among the business community of business development opportunities: -September 10- Networking reception with aerospace and defense companies from Virginia (Read success story, "Virginia Defense Companies Secure Business from 2015 Canadian Defense, Security and Aerospace Exhibition", here http://www.yesvirginia.org/AboutUs/NewsItem/1425) -September 24-Presented to the 2015 Caribbean-Canada Emerging Leaders Dialogue on Nova Scotia's ocean sector
		2. Continue to mobilize and engage community support for Halifax Shipyard's Shipbuilding Project and major projects.	The Partnership sat as a member of the Province's Oceans Committee (morphed from the Major Project Table) focused on the collaboration and alignment of stakeholders on the benefits of building an innovative oceans sector in Nova Scotia. The Partnership has also partnered with NSBI, NSCC, Waterfront Development Corp., Dalhousie University, Halifax Gateway Council, Journeymen and OTCNS to work collaboratively to promote the Oceans Sector. Visit oceaninnovators.com to learn more about their work to date. The Partnership has also delivered more than 30 presentations to various organizations and groups to increase awareness of the benefits of the shipbuilding project and major projects. Maximizing the mega projects in Atlantic Canada is one of the top three priorities of the Halifax Gateway Council. The Halifax Gateway Council prepared a map of the large scale projects underway or planned within the Atlantic Canadian Region with a current combined investment of approximately $128B. These projects are from a variety of sectors: energy, mining, construction and transportation. More information can be found at http://www.halifaxgateway.com/en/home/megaprojectsmap.aspx
<u>MAXIMIZE GROWTH OPPORTUNITIES</u> **Capitalize on our best opportunities for economic growth.**		3. Implement an attraction and retention strategy for Regional and Head Offices to/in Halifax.	Marketing and engagement is on-going. For additional information on the Partnership's Head Office Attraction and Retention Initiative and HRO Success Stories go to: http://bit.ly/1EkTvM6

GOALS (5)	OBJECTIVES (17)	YEAR 3-5 ACTIONS (48)	YEAR 5 - STATUS UPDATES - Q3
	Identify and respond to high value, high potential economic growth opportunities and encourage investment, exports, business productivity, innovation and competitiveness.	4. Work with the Halifax Gateway Council to coordinate activities to improve Gateway efficiency and use.	Through a management services agreement, the Partnership manages the Halifax Gateway Council. In a collaborative effort, the Halifax Gateway led a series of in-market activities in 2015. These activities are important to educate companies on the existing economics and opportunities of moving cargo and people through the Halifax Gateway. The group focused on the following priority markets this year: • Europe - May 2015 - Team included CN, Port of Halifax, Halifax Stanfield International Airport, NSBI, Halifax Partnership and we focused on the following priority markets: Brussels, Antwerp, Amsterdam, Rotterdam, Hamburg. • London - June 2015 – Hosted a high level reception for key business leaders with Premier McNeil and partners at Canada House, London and acted as MC for the Gateway branded event. • Chicago – June 2015 – Hosted a networking reception for 80 stakeholders in the transportation sector in Chicago (marine, rail, air and logistics). • UK/Ireland – November 2015 - (London, Liverpool, Dublin, Glasgow, Aberdeen). Outcome: Three qualified leads. Success includes: • Westjet Encore, Return and extended season announcement of Europe Airpost. • Return and extended season of Condor Airlines to now include 2 German connections: Munich and Frankfurt. • New CMA/CGM, Eimskip shortsea activity between Halifax and New England. • Created and delivered an integrated energy map highlighting the diversification of the sector and potential growth opportunities. • Updated its mega project map created in 2014 to reflect the increase in projects to \$129B. This map was also translated in Mandarin, German and French for use in international markets.
		5. Align and collaborate with provincial and federal partners to position the Halifax business case to attract high-value, high-potential business investments.	The Partnership continues to collaborate with Nova Scotia Business Incorporated (NSBI) and other partners to attract and retain business investment. The Partnership has supported several site visits and helped NSBI connect potential new businesses to business, academic and research partners, and various resources. To ensure a seamless customer experience with one main contact point, NSBI remains the lead organization for Direct Foreign Investment projects. For the period April 1 to December 31, 2015 the Halifax Partnership's investment and trade activities, including missions, partner referrals, information requests, etc., have resulted in six (6) successful projects contributing to 885+ jobs, and a \$100 K B2B contract. Additionally, the Pasrtnership is working on more than 40 investment project leads, of which seven (7) companies have shortlisted Halifax as an expansion location. The Halifax Partnership manages relationships the Municipality has formed with other cities that are primarily-based on economic development opportunities (cultural relationships are managed by the Office of the Chief Administrative Officer). Currently, these relationships are with Aberdeen, Scotland and Norfolk, Virginia, both of which are governed by Memorandum of Understandings. Activity between Q1 & Q3 includes: • In June, 2015, the Partnership designed the program and agenda for a three-day mission initiated and led by the Aberdeen City Council Economic Development. Outcome: 22 meetings, 90 contacts and 3 leads. The Partnership is currently designing the plan and agenda for an Oceans/Logistics Outbound Business Mission to Aberdeen in April 2016. • In September, HP hosted a Virginia Economic Development Partnership Business Mission to Halifax during DEFSEC (Aerospace & Defense Show). As part of that visit, the Partnership delivered an event which enabled the Virginia companies to do ladder pitches about their company, noting why they want to do business in Halifax and with Halifax companies. Outcome: Purchase order signed for \$80,000. • In October, HP hosted a business community reception onboard HMCS Halifax at Naval Station Norfolk. More than 150 business leaders from NATO, Navy, Aerospace & Defense and Oceans attended. It was an opportunity to showcase Halifax's Navy assets and to continue building the relationship. Outcome: A Halifax company is now collaborating with a Halifax-based business. Expectation is that there will be a major contract signed in early February to procure their services. • In January 2015, Mayor Savage assumed the role of President of World Energy Cities Partnership for a two-year term. As the new Presidential city of WECP, Halifax has been invited to lead a business mission to both Aberdeen (Scotland) and Stavanger (Norway). Aftercare services provided to previously closed projects by SmartBusiness. Visit whyhalifax.ca to view the Partnership's suite of investment attraction tools.
		6. Work with the Province, GHP, Destination Halifax and others to maximize opportunities presented by the new convention centre.	On November 7, 2014, the Partnership and Trade Centre Limited signed a Memorandum of Understanding to work collaboratively and partner on strategic opportunities that support the goals of both organizations and economic growth opportunities for our City. The Partnership also consulted with Destination Halifax and Trade Centre Limited in December 2015 as part of the renewed economic strategy (2011-16) engagement process.

GOALS (5)	OBJECTIVES (17)	YEAR 3-5 ACTIONS (48)	YEAR 5 - STATUS UPDATES - Q3
		7. Improve the connection and collaboration between research organizations and business.	• Quarterly economic snapshots (4) • April 2015-Conducted Business Confidence Survey with results released in the Halifax Index. • May 2015-Provided research support to the Institute for Ocean Research Enterprise (IORE) on Halifax's and Atlantic Canada's Oceans Sector as part of a long-term national project they are undertaking. • May 2015- The Partnership released the report, "The Economic Benefits of Immigration: The Impact of Halifax's Lebanese Community" with the results presented at the Halifax Lebanese Chamber of Commerce's AGM. (report found here: http://goo.gl/xs4kkw) • June 2015- The 4th annual Halifax Index was released and presented. Details and copies can be found at www.halifaxindex.com • An energy sector profile was developed for addition to the invest in Halifax section of the Partnership's website. • June 2015- Collaborated with EngageNS on the Nova Scotia Attitudes Survey, with the results presented at the Stepping Up conference • July/August 2015- Assisted the OneNS Coalition by providing background research, commentary, and analysis on Youth Retention in the province. Worked closely with an internal group to draft a discussion document for broader community involvement. • August 2015- Established the Working Group for the Review and Renewal of Halifax's 5-Year Economic Strategy, including the development of an RFP and undertaking a consultant selection process • November, December 2015 - Delivered six Halifax Index Roadshow presentations to various organizations in Halifax.

Attachment 4

HRM and Halifax Partnership Service Level Agreement
SCHEDULE A - Progress Report
for the Period April 1, 2016 to December 31, 2016

HALIFAX PARTNERSHIP
CONNECT. COLLABORATE. PROSPER.

STRATEGY	ACTIONS	OUTCOME MEASURES	TARGETS	Q1 to Q3 Results (Cumulative)	Priority Deliverables for HRM
1. Connect Halifax business to the public and private sector resources and talent they need to grow and prosper.	1.1 Through targeted, in-depth consultation and intelligence gathering, develop strategies to address the company specific and company common needs of business. 1.2 Connect business to emerging talent and skilled professionals who are ready to work and will give business a competitive advantage. 1.3 Work in the ANS Community to facilitate and assist community organizations in the development of strategic and/or project plans.	#1 - Increase the number of jobs created and retained. #2 – Positively impact systemic issues uncovered through BRE visitations. #3 – Create an overarching economic strategy for the 6 ANS communities in Halifax	>500 jobs created and retained > 150 Connector participants find jobs > 2 systemic issues uncovered ANS Community Economic Development Strategy developed	ON TRACK: ▪ 237 consultations ▪ 409 jobs created/retained ▪ (Q3 SmartBusiness results attached) ON TRACK: ▪ 142 Connector participants found Jobs ON TRACK: ▪ Construction and Development Industry identified challenges with regulatory environment. Working to develop Industry Insight Report (Q4) NOT COMPLETED: ▪ ANS Community consulted as part of economic strategy engagement process – more engagement required.	• Business Retention and Expansion Program (SmartBusiness) >200 company diagnostic face-to-face surveys • Increase support to businesses outside the regional centre, over current levels, with resource from HRM's Bridging the Gap program • Halifax Connector Program • Participation on the Local Immigration Partnership • Support of the Mayor's reception for international students • >200 companies visited and quarterly results provided • Mayor's Celebrate Business Program • Facilitation and Support to ANS Community Projects

HALIFAX PARTNERSHIP
CONNECT. COLLABORATE. PROSPER.

STRATEGY	ACTIONS	OUTCOME MEASURES	TARGETS	Q1 to Q3 Results (Cumulative)	Priority Deliverables for HRM
#2 Market Halifax to attract high-value, high-potential business investment	2.1 Leverage existing local, national and international relationships and cultivate new relationships to increase the awareness of the Halifax value proposition.	#4 – Increase the number of jobs created and retained.	>500 jobs created and retained	ON TRACK: ▪ 885 jobs created and retained	
	2.2 Implement a marketing and communications program to generate investment leads.	#5 – Generate qualified leads and closes.	Generate >10 qualified leads > 2 closes	ON TRACK: ▪ 43 Leads were qualified ▪ 6 Closes ▪ (includes 885 jobs + $100k B2B contract)	• Support Business Inbound Missions and Ambassador/Diplomatic Missions
	2.3 Coordinate/ensure effective and timely responses to information requests.	#6 – Improve the success of potential business investment into the Halifax market through connecting and facilitating company-specific visits to Halifax.	Connect and facilitate 12 company specific visits to Halifax	ON TRACK: **6 Inbound Missions:** 1. **April 2015** - Texas EMBA Delegation 2. **June 2015** – Aberdeen Delegation 3. **September 2015** – Norfolk, Virginia Delegation 4. **September 2015** – Spain Delegation 5. **September 2015** – China Delegation 6. **December 2015** – CN **8 Outbound Missions** 1. **May 2015** - Houston (OTC/WECP) 2. **May 2015** - Europe 3. **June 2015** - UK 4. **June 2015** - Chicago 5. **September 2015** - Norfolk 6. **Nov 23-27** - Participated in Consider Canada City Alliance	• Member of Consider Canada Cities Alliance (1 of 11 Canadian Cities) • Participate in World Energy Cities Partnership • Develop and manage the Internal Partnerships for Halifax (Aberdeen, Norfolk) • Capitalize on opportunities for development of industry sectors (e.g. Oceans) • Promote and maintain up to date Halifax Business Case for Investment (whyHalifax.com)

STRATEGY	ACTIONS	OUTCOME MEASURES	TARGETS	Q1 to Q3 Results (Cumulative)	Priority Deliverables for HRM
				Mission to Rotterdam, Zurich and Stockholm. 7. **November 22-27** Halifax Gateway Mission to London, Liverpool, Dublin, Glasgow and Aberdeen. 8. **October 20** –World Energy Cities Partnership AGM in Rio de Janeiro. Mayor Savage assumes the role of President in January 2016.	
	2.4 Develop a FDI Strategy with a focus on key markets and an emphasis on China.	#7 – Develop an FDI Strategy.	Strategy developed	ON TRACK: The FDI Strategy development is included in review and renewal of the Economic Strategy	
#3 - Strengthen private sector engagement to lead the economic growth of Halifax	3.1 Engage private sector investors in leading the economic strategy and achieving One Nova Scotia Report goals	#8 – Client service metric – Do you feel the Partnership is leading the economic goals of Halifax?	Benchmark created	ON TRACK: Benchmark created ▪ **Board Members: 40% agree, 10% strongly agree** ▪ **Investors: 65% agree, 18% strongly agree** *(Source: May 2015 Board Survey and March 2015 Investor Survey)*	• Renewed economic strategy reflects private sector growth focus and private sector input • Develop a private sector engagement strategy in response to One Nova Scotia Report - Now or Never • Support the Sheet Harbour Area Chamber of Commerce community economic planning
	3.2 Mobilize private sector and community stakeholders to collectively identify and respond to threats and opportunities	#9 Increase awareness and perceived value of the Halifax Partnership	Increase the share of businesses that are "completely" or "moderately" favourable with the Partnership by 4.0% (gross)	ON TRACK: ▪ Benchmark - 57% of businesses are completely or mostly favourable with the Partnership *(Source April 2015 Business Confidence Survey)* ▪ Two quarterly economic snapshots released (April and August)	

STRATEGY	ACTIONS	OUTCOME MEASURES	TARGETS	Q1 to Q3 Results (Cumulative)	Priority Deliverables for HRM
	3.3 Provide investor first awareness and insight on economic growth opportunities.	#10 Increase investor satisfaction with the Halifax Partnership #11 Increase the value of private sector investment in the Halifax Partnership	Increase the share of investors are "extremely satisfied" with the value they receive from the Partnership by 6% (gross) >95 renewal >/= $50K increase in private sector cash investment	ON TRACK: ▪ Benchmark - 27.3% Investors extremely satisfied *(Our goal becomes 33.3%) (Source: March 2015 Investor Survey* ON TRACK	
# 4 -- Provide market and competitive economic intelligence, analysis and thought leadership on the Halifax economy.	4.1 Produce the Halifax Index and economic reports and communicate broadly. 4.2 Position the Partnership as the lead economic development organization and the go to source for economic development research. 4.3 Undertake, and communicate broadly economic, sectorial and competitiveness research. 4.4 Provide thought leadership, analysis and work to improve government policy affecting business issues.	# 12 - Increase awareness and perceived value of the Halifax Partnership with key stakeholders (local private sector and all 3 levels of government) #13 -Provide direct input on major policy that will positively impact high wage, high growth sectors	> increase in positive response to Halifax Partnership surveys, including investor survey CRA Survey and other client-centered surveys developed through the Client Services Delivery Model (see strategy #5) Provided direct input on 2 major policy initiatives that positively impact high wage, high growth sectors	ON TRACK: ▪ Survey results to be presented in Q4 ▪ Presented 2015 Halifax Index ON TRACK: ▪ Review and renewal of Economic Strategy underway ▪ Worked with the OneNS Coalition to provide background research, commentary, and analysis to develop Youth Retention recommendations for the Province. ▪ Developed economic impact report for Canadian-Lebanese Chamber of Commerce. ▪ Completed the Business	• With HRM, lead renewal of Halifax's economic strategy • Present the 2015 Halifax Index • CRA Annual Confidence Survey • Continued support of Bold Halifax movement • Provide economic analysis to HRM as required to facilitate informed decision making, including, e.g. independent review of HRM's taxi rate per Administrative Order 39

STRATEGY	ACTIONS	OUTCOME MEASURES	TARGETS	Q1 to Q3 Results (Cumulative)	Priority Deliverables for HRM
				Confidence Survey, April 2015, with results released in the Halifax Index. ▪ Collaborated with EngageNS on the Nova Scotia Attitudes Survey, with the results presented at the Stepping Up conference in June 2015. ▪ 10 media articles/mentions providing economic expertise and thought leadership on Halifax economy	
#5 -- Pursue an organizational cul ture of client focus, innovation and excellence	5.1 Ensure effective board oversight, including risk and financial management and implementation. 5.2 Ensure innovation, effectiveness and efficiencies in operations through regular evaluation of activities and financial performance. 5.3 Demonstrate innovation in organization's programs and services. 5.4 Develop a client/investor feedback mechanism to measure impact and effectiveness in client service.	# 14 - Improve financial stability # 15 - Maintain or improve Board effectiveness (communication, engagement, innovation and risk management) #16 - Improve organizational effectiveness, including innovation through IT and HR practices # 17 - Improve and focus on client service delivery with a "business first" focus	>$40k invested in the reserve Implement strategies to address improvements required as identified in annual Board surveys Hold a special Audit and Risk Committee meeting to review the risk management program, with an invite to any Board member. Implement recommended changes. Implement strategies to address improvements identified through a semi-annual employee survey Develop a Client Services Delivery Model and implement strategies, including CRM system, to address client needs as	ON TRACK: ON TRACK: Survey results to be presented to Corporate Governance Committee in Q3. Corporate Governance Review Q4. ON TRACK: Enterprise Risk Framework and New Policy approved by the Audit and Risk Committee on January 19, 2016. ON TRACK: Semi Annual Survey completed July 2015 ON TRACK: CRM System to be implemented in Q4 and Q1 of 2016-17.	• Mayor, CAO and two Councillors sit as members of the Board of Directors • Regular reporting to the Community Planning and Economic Development Committee and Regional Council, CAO and Government Relations and External Affairs

STRATEGY	ACTIONS	OUTCOME MEASURES	TARGETS	Q1 to Q3 Results (Cumulative)	Priority Deliverables for HRM
			identified in survey feedback		

Attachment 5

Historical Population, Employment and Commercial Tax Base Figures (Halifax, 2009-15)								
		2009	2010	2011	2012	2013	2014	2015
Population	**Population (persons)**	**393,692**	**398,259**	**402,433**	**406,757**	**409,974**	**414,398**	**419,000 (f)**
	Annual Change		*1.2%*	*1.0%*	*1.1%*	*0.8%*	*1.1%*	*1.0% (f)*
GDP	**Gross Domestic Product (2007 chained $)**	**-**	**17,544**	**17,790**	**17,933**	**18,179**	**18,579**	**19,004 (f)**
	Annual Change			*1.4%*	*0.8%*	*1.4%*	*2.2%*	*2.3% (f)*
Employment	**Employment (Thousands)**	**214.6**	**216.5**	**219.2**	**221.7**	**222.3**	**223.3**	**224.1**
	Annual Change		*0.9%*	*1.2%*	*1.1%*	*0.3%*	*0.4%*	*0.4%*
	Full Time Employment (Thousands)	177.4	176.9	178.7	179.7	180.6	183.0	186.4
	Unemployment Rate	6.5%	6.5%	6.1%	6.2%	6.5%	6.1%	6.3%
	Participation Rate	71.0%	70.7%	70.4%	70.3%	69.9%	69.2%	68.6%
	Youth Unemployment Rate (ages 15-24)	13.1%	12.5%	14.0%	13.0%	15.2%	13.2%	12.0%
Tax Base	**Commercial Tax Base**	**$5.4 billion**	**$5.7 billion**	**$6.1 billion**	**$6.5 billion**	**$6.9 billion**	**$7.4 billion**	**$7.8 billion**
	Annual Change		*4.70%*	*6.3%*	*6.7%*	*6.1%*	*6.5%*	*6.00%*

(f) = Forecast by Conference Board

Sources: Conference Board of Canada, Statistics Canada, Halifax Regional Municipality

Detailed Sources: Conference Board of Canada (Metropolitan Outlook Autumn 2013-2015), Statistics Canada CANSIM 051-0056 & 282-0129, HRM Finance