Item No. 11.2.1 (iii)



PO Box 1749 Halifax, Nova Scotia B3J 3A5 Canada

Heritage Advisory Committee
March 24, 2010
Grants Committee
March 1, 2010
Halifax Regional Council
April 20, 2010

TO:

Chair and Members of Grants Committee

Chair and Members of Heritage Advisory Committee

SUBMITTED BY:

Austin French, Acting Director, Community Development

DATE:

January 6, 2010

SUBJECT:

Property Matter: Less than Market Value Sale, 2463 Rocky Lake

Drive, Waverley - Waverley Ratepayers Association

ORIGIN

In November 1996, Regional Council approved the sale of the "Waverley Village Office/Museum" to the Waverley Ratepayers Association for the sum of \$1. HRM received a request from the Waverley Ratepayers Association reaffirming their desire to conclude the acquisition of the property located at 2463 Rocky Lake Drive, Waverley.

RECOMMENDATION

It is recommended that:

- 1. The <u>Grants Committee</u> recommend that Halifax Regional Council approve in principle staff's recommendation to enter into an Agreement of Purchase and Sale whereby the property located at 2463 Rocky Lake Drive, Waverley, be conveyed to the Waverley Ratepayers Association for the sum of \$1, plus all associated costs as per the terms and conditions set out in the Discussion section of this report;
- 2. <u>Heritage Advisory Committee</u> forward a positive recommendation to Regional Council with respect to the applicable terms and conditions to protect the property's heritage status.

BACKGROUND

The Municipal Government Act (1998), Section 51, allows the sale of municipal property at less than market value to a non-profit organization. The sale must be approved by a two-thirds majority of Council present and voting at a public hearing. Section 109 of the Act gives municipalities the discretionary authority to exempt a charity from payment of deed transfer tax (calculated as 1.5 percent of the sale price).

In 2007, the civic address of properties on Rocky Lake Drive, Waverley, were re-numbered to accommodate changes in lot size and services at the Bedford end of the road. Consequently, 1319 Rocky Lake Drive changed to 2463 Rocky Lake Drive, Waverley.

DISCUSSION

1. Property Ownership:

In 1991, the former Village Commissioners of Waverley acquired title to the property, the former St. John's Anglican Church and church hall, from the Anglican Church for the sum of \$40,000¹. It should be noted that the Village Commissioners of Waverley also entered into an agreement with an abutting private property owner to recognize a fence as a mutual property boundary². As such, the proposed conveyance from HRM to the Waverley Ratepayers Association is subject to this ancillary agreement. As a precaution, HRM initiated a plan of survey and revised legal description.

In 1995, the village was dissolved under the <u>Halifax Regional Municipality Act</u> and its assets/liabilities were assumed by the new municipality. In November 1996, Regional Council approved the sale of the "Waverley Village Office/Museum" to the Waverley Ratepayers Association for the sum of \$1 (Minutes, November 18, 1996). The motion passed unanimously. However, during debate concern was expressed regarding increased operating costs due to property taxes, and future ownership should the association be dissolved. In recent years such concerns have been addressed using a Buy-back Agreement. The official minutes are silent on the matter of registered heritage status. Due process established by HRM has been to (a) protect heritage status where possible and (b) to seek commentary from the HRM Heritage Advisory Committee regarding any proposed sale of a municipally owned heritage building or site.

Evidently, the conveyance never took place and title remains in the name of the Waverley Village Commissioners at the Nova Scotia Registry of Deeds and accordingly vested in HRM under the Halifax Regional Municipality Act (1995). Given the reason for Council's 1996 resolution not

¹ The Agreement of Purchase and Sale states a value of \$1. The amount of \$40,000 is cited in a letter to HRM dated 1996 and in the staff report of October 15, 1996.

² Agreement dated July 12, 1991, between Charles R. Thompson and Village Commissioners of Waverley wherein both parties agree to recognize "...the fence" as the mutually agreed to boundary between the two properties.

2463 Rocky Lake Drive, Waverley Committee Report

having been acted upon is unknown and considerable time has lapsed (ie. 14 years), staff thought it prudent to seek authorization through the established public hearing process. The recommended sale price (\$1) is identical to that previously approved by Regional Council. However, the proposed terms and conditions of sale differ in terms of adding the protection of the property's registered heritage status, a buy-back agreement to protect the public interest, and the cost of sale recovery to avert a net loss to HRM.

Presently, there is no lease agreement or facility management agreement in effect. Under HRM's ownership the property has not, in error, been assessed for real property tax. A property sale will trigger an assessment as Commercial (ie. non-residential).

2. Property Operator:

In 1995, the Waverley Ratepayers Association was incorporated as a non-profit society. Evidently, the society has operated the property known as the "Waverley Heritage Museum and Community Centre" since 1995-96 for various community functions. The descriptor as "heritage museum" refers to use of the former church for the storage and display of a privately owned collection of local memorabilia and historical records/artifacts. The hall is used by a variety of local groups for meetings, social functions, events, and a CAP site.

3. Property Zoning and Land Use By-law:

The property is zoned C-2 Community Commercial. The use of the facility as a community hall falls within the definition of Community Facility of the Land Use By-law for Planning Districts 14 and 17 (Shubenacadie Lakes). Specifically, as both a community hall and an historic site.

4. Proponent's Offer and Intended Use:

The Waverley Ratepayers Association has requested title for the sum of \$1.00. It is understood that the intended use is identical i.e., a community hall and/or community museum.

5. Heritage Protection:

The former St. John's Anglican Church was the first church built in the Waverley area (c.1862) to serve settlers and migrant gold miners. The church was first located on Lake Thomas Drive, Waverley, and re-located to its current location in 1893. The original structure is wood framed and in the Gothic style with several additions in subsequent years. The property was registered by the former County of Halifax as a heritage property in 1994.

6. Property Tax Status:

As noted in the staff report to Regional Council dated October 15, 2009, the Village Commissioners of Waverley applied to the Province in 1995 for tax exempt status under Section 5(1) of the

Assessment Act (1995). However, "With dissolution of Village status under Section 8(1) of the Halifax Regional Municipality Act (1995) this exemption no longer applied". Council were offered two potential options to consider with respect to assisting the Waverley Ratepayers Association, namely (1) application for exemption from Business Occupancy Tax under Section 27(1) of the Assessment Act, or (2) that HRM make a grant to the Waverley Ratepayers Association to "....cover the taxes under the provision of Section 77(aj) (vi) of the Halifax Regional Municipality Act, such grants not to exceed one percent of the taxes for general municipal purposes levied by the Regional Municipality" (Staff Report, p.4).

Subsequent to Council's deliberation regarding the tax status of the property, HRM introduced By-law T-200 in 1996-97 that provides tax assistance to certain types of registered non-profit organization. As such, the value of tax exemption need not be limited to one (1) percent of the general tax rate. In January, 2010, HRM staff mailed an application form to the Association for the *Tax Exemption for Non-Profit Organizations Program* (By-law T-200) intake for 2010-2011. Staff will recommend acceptance of a late application to recognize HRM's error of omission. As owner, responsibility for requesting an assessment and tax billing was HRM's.

7. Proposed Sale Price:

Summary of Key Terms and Conditions (Proposed)		
Civic Address	2463 Rocky Lake Drive, Waverley	
Site Area	Building Land	
Zoning	C-2 Community Commercial	
Assessment Value	\$39,300	
Proposed Sale Price	\$1	

Summary of Key Terms and Conditions (Proposed)	
Specific Conditions	A Buy-Back Agreement shall provide HRM with the right of first refusal should the society cease operations or elect to sell the property at a later date.
	The owner shall maintain the registration as a municipal heritage property and unconditionally agrees rights to waive rights to substantially alter, demolish, or de-register the property pursuant to Section 16, 17 and 18 of the Heritage Property Act.
	The owner is obliged to maintain the exterior of 2463 Rocky Lake Drive as may be reasonably necessary through consultation with the HRM Heritage Advisory Committee.
	The purpose of the donation shall be for the operation of a community hall and/or community museum.
	The property shall be taxable. Application for assistance with property tax shall be made by separate application under By-law T-200.
Closing Date	Spring, 2010
Cost of Sale Recovery	The purchaser shall pay all costs associated with this sale including HRM's eg. deed registration, site survey, legal fees, etc.

Proposal Analysis:

The proponent has accepted the proposed terms of sale. Specifically, the sale price, Buy-Back Agreement, and waiver of the right to de-register. There was; however, a question if de-registration could be considered under exceptional circumstances, for example, if the built structure (in this case the church) were totally destroyed by fire or were to be re-located to another site.

Given that the intent of registration is to prevent any unsubstantiated requests to de-register or demolish an asset/artifact deemed to be of historical value and in the public interest to protect, it seems reasonable to assume that under extenuating circumstances de-registration might be permitted. Under such circumstances the owner could make application to Regional Council for the land to be de-registered. This would be a discretionary decision of Council, the Heritage Property Act is silent on this type of request. It should be noted; however, that the built structure is not original to the site and was moved from Lake Thomas Drive, Waverley.

BUDGET IMPLICATIONS

Using the assessment value of \$39,300, a sale price of \$1 would decrease HRM's potential revenue by \$39,299. However, the sale will create a property tax account where previously (in error) there was none. Applicable adjustments to the Purchase Price include, but are not limited to, appraisal,

survey, easements, environmental impacts, grading deficiencies, wetland management, legal, marketing and administrative costs. Adjustments or deficiency allowances resulting from the Purchaser's due diligence inspection, if required, shall be to a maximum of 15 percent of the purchase price.

FINANCIAL MANAGEMENT POLICIES / BUSINESS PLAN

This report complies with the Municipality's Multi-Year Financial Strategy, the approved Operating, Capital and Reserve budgets, policies and procedures regarding withdrawals from the utilization of Capital and Operating reserves, as well as any relevant legislation.

ALTERNATIVES

1. The HRM Grants Committee could amend the staff recommendation and direct staff to pursue (a) a market value sale, or (b) a less than market value sale at a percentage of the market value.

This action is not recommended: HRM acquired title by default through the dissolution of the former Waverley Village Commissioners under an Act of the Nova Scotia Legislature. The \$40,000 paid to acquire title was from a "surplus fund in the Village accounts" (Staff Report, 1996, p.3). In effect, the public of Waverley (and by extension HRM) have already paid to acquire title. Hence, staff find no basis to recommend amending Regional Council's previously stated intent to transfer title for \$1. To require a market value sale, or decrease the value of discount, would in effect realize a 'profit'. The property is surplus to municipal operational requirements.

ATTACHMENTS

- 1. Letter to HRM from Waverley Ratepayers Association, February, 2010.
- 2. Extract from Minutes HRM Regional Council dated November 18, 1996, pp.6-7.
- 3. Staff Report to Regional Council dated November 8, 1996, and Supplementary Report dated November 18, 1996.
- 4. Site Map and Photograph 2463 Rocky Lake Drive, Waverley.

A copy of this report can be obtained online at http://www.halifax.ca/council/agendasc/cagenda.html then
choose the appropriate meeting date, or by contacting the Office of the Municipal Clerk at 490-4210, or Fax
490-4208.

Chad Renouf, Real Estate officer, Transportation & Public Works

Report Approved by:

Report Prepared by:

Andrew Whittemore, Manager, Community Relations & Cultural Affairs,

Peta-Jane Temple, Team Lead Grants & Contributions, Community Development 490-5469;

Community Development, 490-1585

Report Approved by:

Peter Stickings, Manager, Real Property, Transportation & Public Works

To: Peta-Jane Temple

Team Lead, Grants & Contributions

HRM Community Development

FAX # 490-5950

RE: Waverley Ratepayers Building/Museum 2463 Rocky Lake Rd

The Waverley Ratepayers Association (WRA) wishes to proceed with the official re-purchase of the property located at 2463 Rocky Lake Rd in Waverley from the HRM for the sale price of \$1.00 (one dollar)

As part of this sales agreement the WRA agrees with the following conditions;

- A buy-back clause be included such that if the WRA intends to sell the property in the
 future that HRM has the right of first refusal for the 1991 original purchase price of
 \$40,000 as paid by WRA. In addition, the WRA should receive due compensation for
 the cost of major capital improvements to the building that were paid solely by the WRA.
- 2) The WRA will never apply to de-register the Heritage Status of the building.

3) The WRA will pay all costs of the Sale.

David Macdonald, Chair WRA

MOVED by Councillors Downey and Blumenthal that the development agreement, which would permit a restaurant in the Upper Level Pier 22, Marginal Road, be approved by Halifax. Regional Council; and, that the development agreement be signed within one hundred and twenty days or any extension thereof granted by Council on the request of the applicant, from the date of final approval of Halifax Regional Council and any other bodies necessary whichever approval is later, otherwise this approval will be void and obligations arising herein shall be at an end:

In response to a question from Councillor Stone clarifying the address of Pier 22. Mr. Woods stated the civicaddress is Marginal Road and Terminal Road is the connection to the city street system.

Councillor Stone stated this was a good use of this facility and it adds to the tourism perspective of the Hallfax Regional Municipality.

MOTION PUT AND PASSED UNANIMOUSLY.

1.3 Sale of Waverley Village Office Museum

I. A supplementary report prepared by Mr. George McLellan, Commissioner of Regional Operations, dated November 8, 1996, regarding granting the deed of the Waverley Village Office/Museum to the Waverley Ratepayers Association for nominal consideration of \$1,00, was before Council.

Mr. Mike Woods, Real Estate, presented the report to Council recommending that the deed of the Waverley Village Office/Museum be granted to the Waverley Ratepayers Association for nominal consideration of \$1.00.

In response to a question from Councillor Blumenthal. Mr. Woods stated the proposal was put forward on the basis that an area rate would apply. Councillor Snow added the community was of the understanding that there would be area rates if the community desired it. He noted the Village has looked after this building for many years. The building is valued at \$60,000 and it was purchased with ratepayers funding. The building became the property of HRM on April 1, 1996.

Councillor Walker noted the building may not be approved for tax exemption and, therefore, the Ratepayers Association may need to come up with additional funding. Mr. Woods noted the building is assessed for \$36,000 and the taxes would be about \$900.

In response to a question from Councillor Harvey asking what would happen to the building if the Ratepayers Association was dissolved. Deputy Mayor Greenough stated it could be part of the agreement that the building would be returned to HRM. Mr. Woods replied this could be done but there are some restrictions. Deputy Mayor Greenough requested the Municipal Solicitor to explore this further.

Councillor Stone expressed concern with setting an example for future ratepayer associations expecting to purchase buildings for \$1:00.

Deputy Mayor Greenough called for members of the public wishing to speak either in favour or against this proposal.

SPEAKERS IN FAVOUR

Mr. Bill Lockhart. Waverley Ratepayers Association, spoke in favour of the proposal stating they are concerned about this building. He suggested area rates as well as volunteer fundraising should be used to fund operating costs.

In response to a question from Councillor Stone, the Ratepayers Association indicated they had no problem with the building being turned over to the HRM if the association ceased to exist. However, it was noted that the artifacts of the museum would continue to belong to Mrs. Annie Blois-Smith.

Deputy Mayor Greenough called three times for additional speakers either in favour or against this proposal. No one came forward.

SPEAKERS IN OPPOSITION - None

MOVED by Councillors Cunningham and Sarto that the Public Hearing be closed.
MOTION PUT AND PASSED UNANIMOUSLY.

DECISION OF COUNCIL

MOVED by Councillors Snow and Blumenthal that the deed of the Waverley Village Office/Museum be granted to the Waverley Ratepayers Association for nominal consideration of \$1:00. MOTION PUT AND PASSED UNANIMOUSLY.

MOVED by Councillors Blumenthal and Uteck that the meeting adjourn at 7:50 p.m. MOTION PUT AND PASSED UNANIMOUSLY.

Vi Carmichael Municipal Clerk

HALIFAX REGIONAL MUNICIPALITY

Halifax Regional Council Public Hearing November 18, 1996

To:

Mayor Walter, Fitzgerald and Members of Regional Council

From:

dministrative Officer

George McLellan, Commissioner of Regional Operations

Date:

November 8, 1996

Subject:

Waverley Village Office/Museum

SUPPLEMENTAL REPORT

ORIGIN

October 15, 1996 Council Meeting during which Halifax Regional Council set a date for a public hearing under the provisions of Section 68(6) of the Halifax Regional Municipality Act to consider granting a deed of the Waverley Village Office/Museum to the Waverley Ratepayers Association for nominal consideration of \$1.00.

Attachments: Staff Report (Appendix "A")

Newspaper Ad (Appendix "B")

Further information regarding the contents of this report may be obtained by contacting Austin French at 490-4493 or Mike Woods at 490-5925. For additional copies, or for information on the report's status, please contact the Office of the Municipal Clerk at 490-4210 or 490-4208(Fax).

Background:

The Halifax Regional Municipality has been approached by the Waverley Ratepayers Association (1995) with a request that the Waverley Village Office/Museum be returned to the Ratepayers Association for nominal consideration (AppendicA). The property, a former Anglican Church, was purchased in 1991 for \$40,000 by the residents of Waverley through a surplus fund in the Village accounts. Under Section 8 of the Halifax Regional Municipality Act, the Village of Waverley was dissolved and its assets vested to the Regional Municipality.

The building houses a Heritage Museum, dedicated to the history of Waverley, the contents of which have been collected and are owned by Mrs. Annie Blois-Smith. The Museum is run through volunteer efforts by the Waverley Heritage Society.

Through various fund raising efforts, an adjoining section was added to the building, costing roughly \$20,000, which serves as an office and a trophy repository for "Gold Rush" days competitions. This addition functions as a meeting place for a number of programs and events.

Discussion:

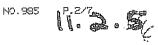
Prior to dissolution of the Village, the Commissioners took the measure of incorporating as the Waverley Ratepayers Association (1995) and continued to operate the facilities through area rates. Through volunteer efforts, operating nosts for 1995 were kept below \$4,000 which covers all utility costs and grass cutting. The association had generated investments of approximately \$15,000, which are available as a contingency reserve for future repairs and upgrading.

The Waverley Ratepayers Association is asking that the property be transferred back to that organization for nominal consideration of \$1.00 so that the association can continue to operate the facility at no expense to the Regional Municipality.

Under Section 68(6) of the Halifax Regional Municipality Act, the Municipality, by resolution passed by at least two thirds majority of Council, may grant land or sell land at a price less than actual value to:

- (a) a library, museum, art gallery, art school or theatre of performing arts;
- (b) a charitable, musing, medical, athletic, educational, environmental, cultural, religious or social organization within the Province;
- a non-profit organization that erects, enlarges or improves housing accommodation within the Regional Municipality; or

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APPENDIX "A"

Halifax Regional Municipality

Halifax Regional Council 15 October 1996

To:

Mayor Fitzgerald and Members of Regional Council

Submitted by:

Administrative Officer

George McLellan, Commissioner of Regional Operations

Date:

02 October 1996

Subject:

Waverley Village Office/Museum

STAFF REPORT

Origin:

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Letter from Mr. Bill Lockhart, Chairman of the Waverley Ratepayers Association (1995).

Recommendations

It is recommended that:

Council set a date for a public hearing under the provisions of Section 68(6) of the Halifax Regional Municipality Act to consider granting a deed of the Waverley Village Office/Museum to the Waverley Ratepayers Association for nominal consideration of \$1.00.

an organization that the Council considers to be carrying on an activity that is (d) beneficial to the Regional Municipality,

if the Council first holds a public hearing respecting the sale or grant and advertises the hearing at least twice, the first notice to appear at least fourteen days before the hearing, the notice to include the date, time and place of the hearing, the location of the land, the estimated market value of the land and the purpose of the sale or grant.

The activities of the Waverley facility meet the intent of sub clauses (a), (b) and (d). In staff's view, the Association has the capability through its network of volunteers to continue to operate the facilities in a responsible manner. Staff therefore considers the request to deed the property back, a reasonable one, subject to the Regional Municipality approving the necessary area rate to allow for the continued operation of the facility.

Taxes.

The Waverley Commissioners had applied to the Province and were granted tax exempt status in 1995, under Section5(1) of the N.S. Assessment Act. With the dissolution of Village status under Section 3(1) of the HRM Act, this tax exemption would no longer continue to apply.

Council has two options that it can consider:

- It may by bylaw, exempt the Ratepayers Association from Business Occupancy Tax as a (1)non-profit organization under the provisions of Section 27(1) of the Assessment Act, or,
- It may make a grant to the Association to cover the taxes under the provisions of Section (2)77(aj)(vi) of the HRM Act, such grants not to exceed one percent of the taxes for general municipal purposes levied by the Regional Municipality.

In a discussion with the Provincial Assessment Department, staff is still showing the property in the name of the Village of Waverley assessed for \$36,000, commercial property exempt. If the the Association were deemed liable for taxes this year, the amount would not be significant. Staff suggests that they could be covered in the area rate, if applicable, and that next year the Association could apply for a grant to cover the taxes, estimated to be in the area of \$500.

Budget Implications:

If the transfer to the Ratepayers Association is granted, the Municipality foregoes potential revenue from the asset.

Conclusion:

The Waverley Village Office/Museum is a special purpose building that is situated on an undersized lot and does not have any obvious reuse development potential. In addition, it is a registered heritage property, which again places further restrictions on the property. It was paid for by the citizens of Waverley and the Waverley Ratepayers Association has the volunteer resources to continue to operate the facility. Staff favors returning it to the citizens of Waverley.

Alternatives:

There are no afternatives.

Attachments:

Further information regarding the contents of this report may be obtained by contacting Austin French at 490-4493 or Mike Woods at 490-5925. For additional copies or for information on the report's status, please contact the Office of the Municipal Clerk at 490-4210 or 490-4208(FAX).

MPW/sfs

File#mike47

Village of Waverley

Ganusillor Gordon Brose District 2 Augustalianialpahty P.C. Box MB Waterloy, N. S. Bon 230

April 3, 1996

re: Waperley Village Office/Museum

Mour Councillor Some

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What we use is that the Regional Municipally show constituenties with region to the americable of the Village Measure and Offices by recurring the property to the Widerstein Rulephyres Association (1999) for a tolern sum. We take to constrain to operate the factor as part of our community and success from the residents with the our fillage sense and gethering place. We have one rate relief the residents with their by the medical of the constrainty and efficient facility to continue to induction and provides the facility is authoris to induction and provide the facility and provident for a continuency from for future topoint and appoint and appeared the facility is a successful.

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We again use that you make representation to the lagional attencipality and arrange the transfer of the property to our Eulepayers resociation with the understanding that the tex will not change. The building will remain as the exampt, not presenting a durace of the Augsmal identicipality has construing to a bangle to Wannely and per friends.

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APPENDIX "B"

REGIONAL OPERATIONS REAL ESTATE MEMORANDUM

TO:

Patti Halliday, Assistant Municipal Clerk

FROM:

M. P. Woods, Senior Development Assistant

DATE:

24 October 1996

SUBJECT:

Waverley Village Office/Museum Newspaper Ad

Take Notice that Halifax Regional Council at a meeting to be held on 18 November 1996, at 6:00 p.m., at Regional Council Chambers, 2750 Dutch Village Road, Halifax, Nova Scotia, will be considering the conveyance of municipally-owned property known as the Waverley Village Office/Museum to the Waverley Ratepayers Association (1995) for nominal consideration of \$1.00 to allow for the continued operation of the facility by the Ratepayers Association. The property currently has an estimated value of \$60,000.

Opinions in support of or in opposition to the proposal may be presented orally at the 18 November meeting. Written opinions may be forwarded to the office of the Municipal Clerk, 1841 Argyle Street, Halifax, Nova Scotia, prior to 18 November 1996.

MPW/sfs File#mike61



ATTACHMENT 4

CIVIC #2463 ROCKY LAKE DRIVE WAVERLEY, N.S.



LEGEND

This map was produced for the internal use of Halifax Regional Municipality(HRM). HRM takes no responsibility for errors or omissions.

For further information on civic address, street street name or community(GSA) data blease contact HRM Civic Addressing at 490-5347 or email ctivicadd@hakfax co

For turner information on sewer intrastructure please contact HRM Environmental Engineering Services at 490-5549 or email sewernto@nat/ax.co.

For luther information on zoning data please contact HRM Planning & Development Services at 490-4494 or timail zoninginquirles@halifax ca.

al ইয়া-ইএই or email zoningincipulus श्लीमंत्रीत्वर ca. For lurther information regarding any other aspect of the piot jokaze contact HRM Geographic information System & Services at 486-8568 or email geomic श्लीमंत्रीयर ca.

Date of map is not indicative of the date of data creation. Scale of map is valid only if printed at 11x8.5 inches.

Projection is Modified Transverse Mercator Zone 5.

