

Municipal Study 2011

**City of Greater Sudbury
Comparison to Northern Municipalities**

Presentation

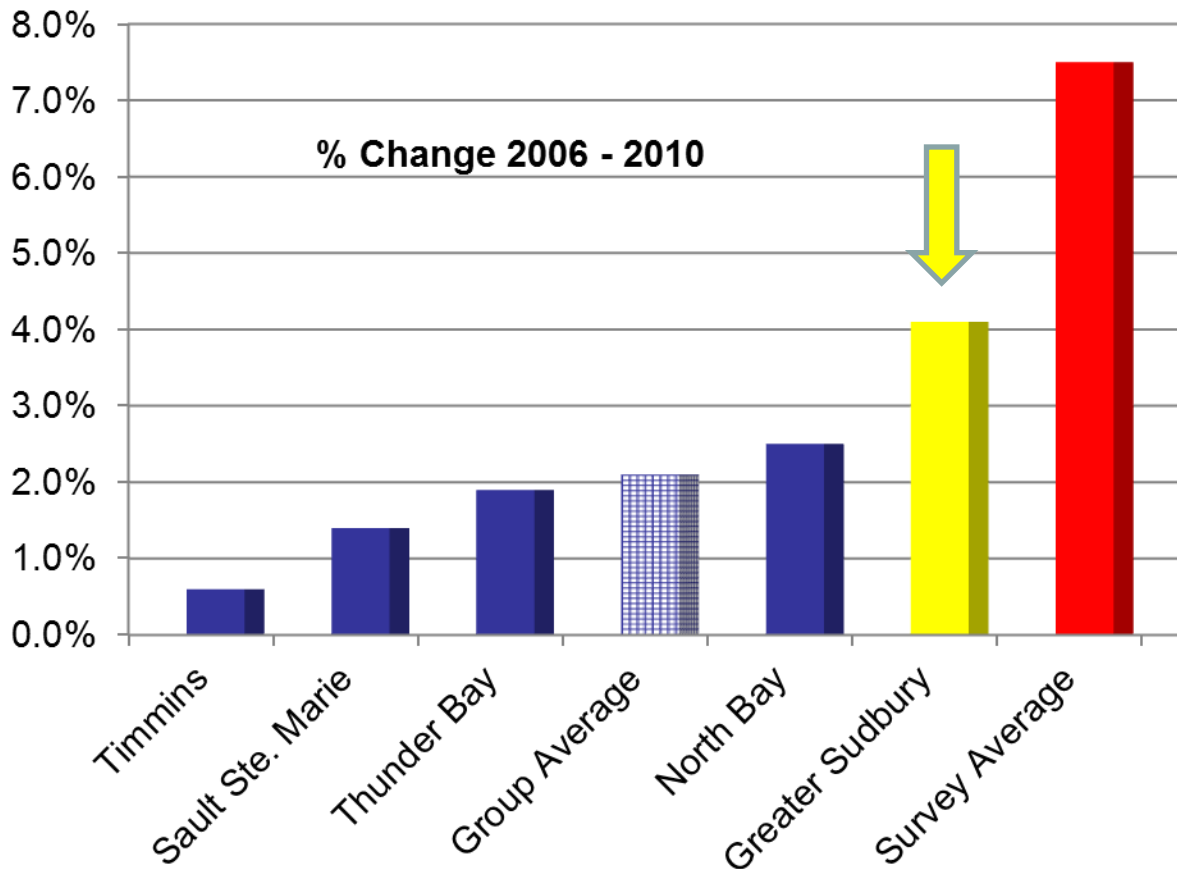
- Provide an update on the 2011 Municipal Study
- 84 municipalities in the study
 - Presentation focuses on Northern municipalities
- Municipal Profile
- Municipal Financial Information
- Select User Fee
- Tax Policies, Tax Rates
- Comparison of Relative Taxes
- Water/Sewer Comparisons
- Taxes as a % of Income





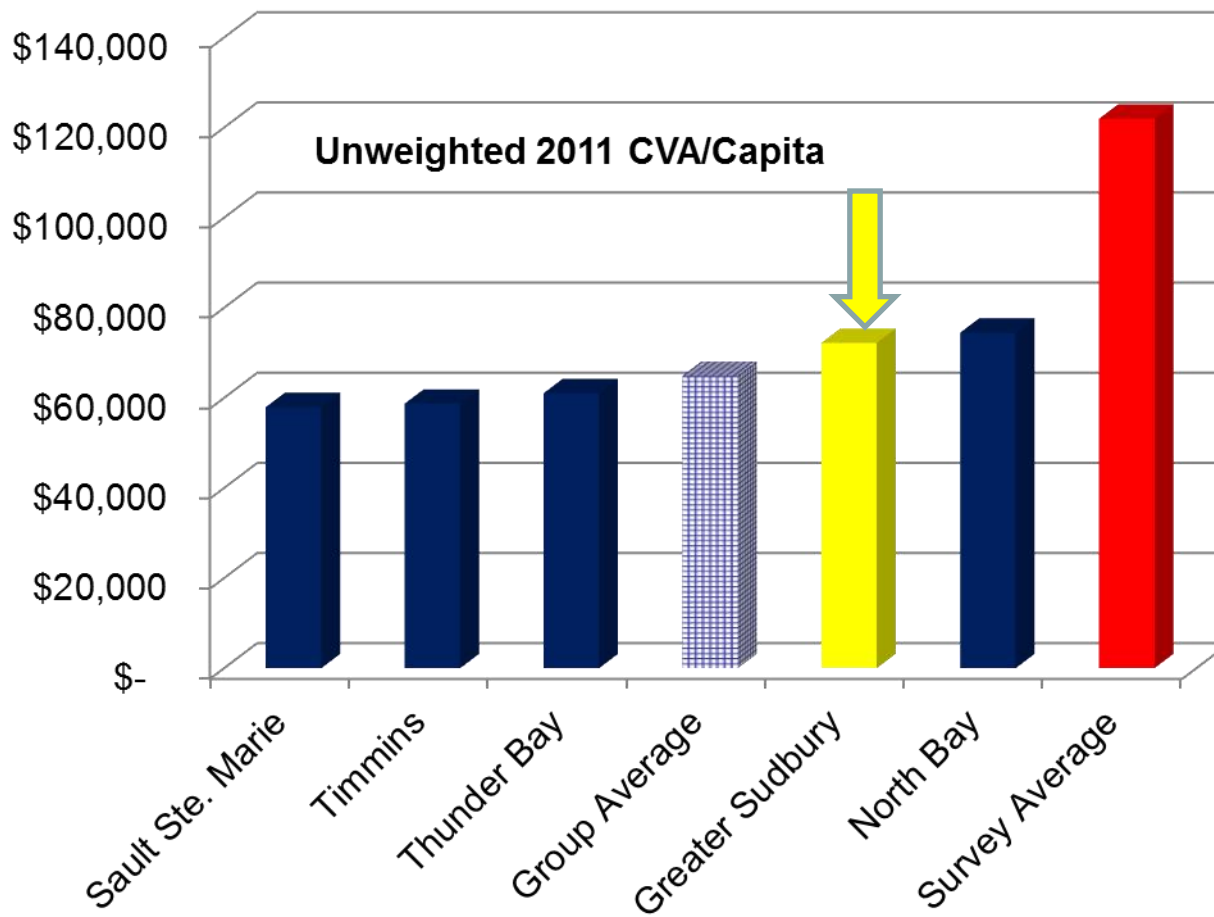
Municipal Profile

Population Statistics



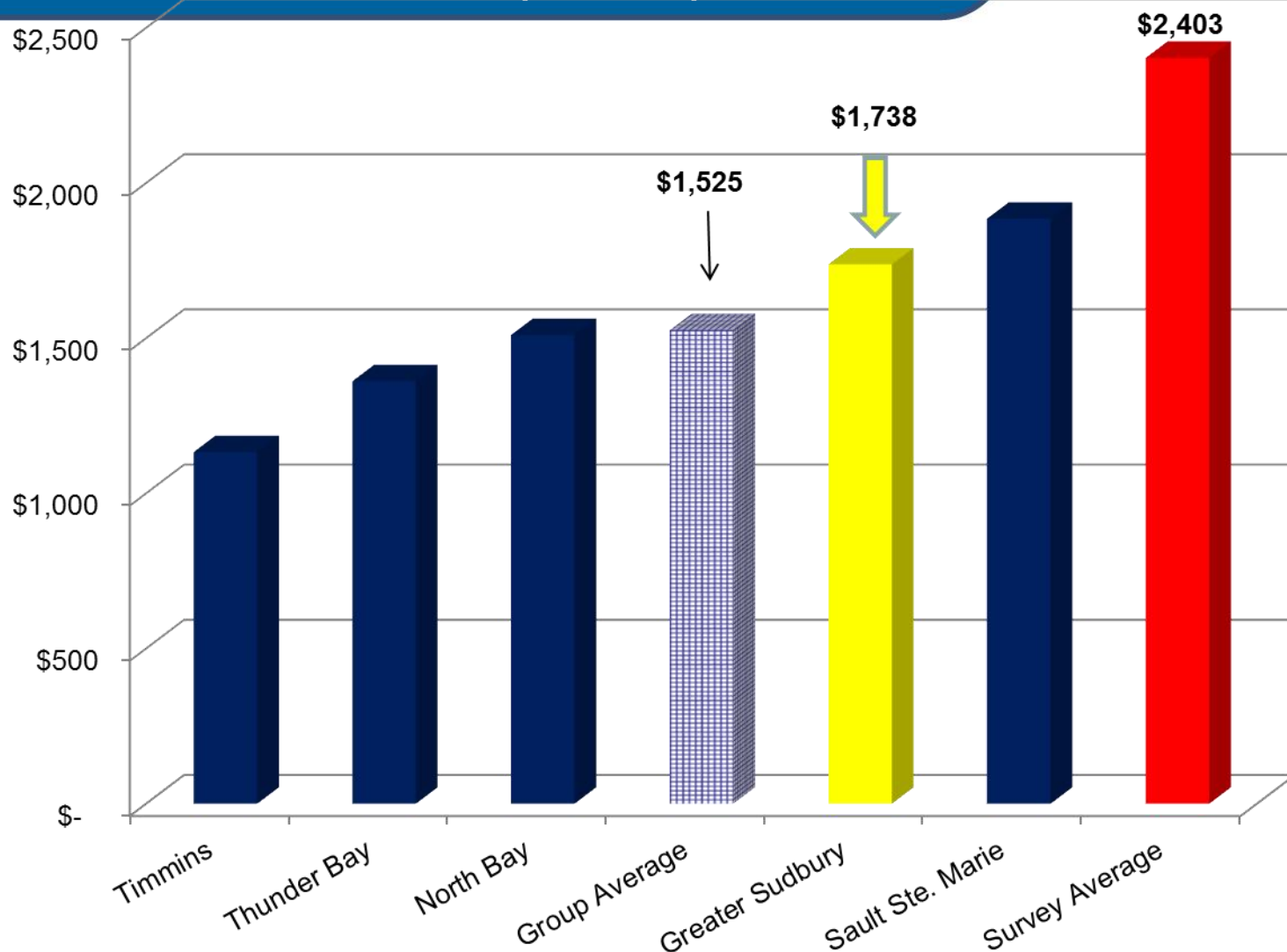
Greater Sudbury's increase is 4.1% compared to the group average of 2.1% and the survey average of 7.5%

2011 Unweighted Assessment per Capita



Greater Sudbury's assessment of \$72,232 is above the Northern municipality group average of \$64,879

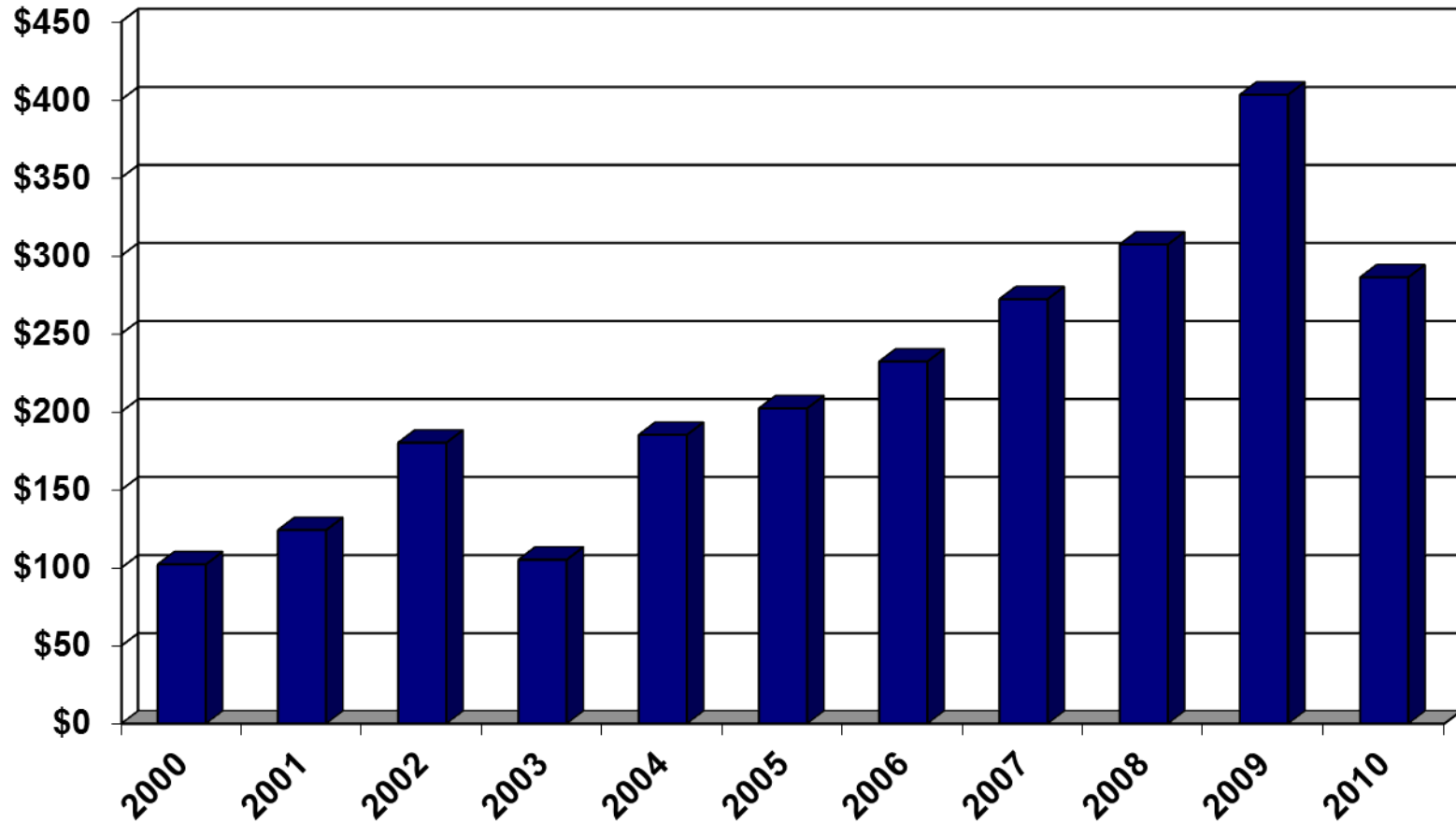
2010 Construction Value per Capita



Building permit value per capita provides an indication of the relative activity in each municipality – Sudbury has the second highest construction activity in Northern municipalities

Building Permit Activity Trend

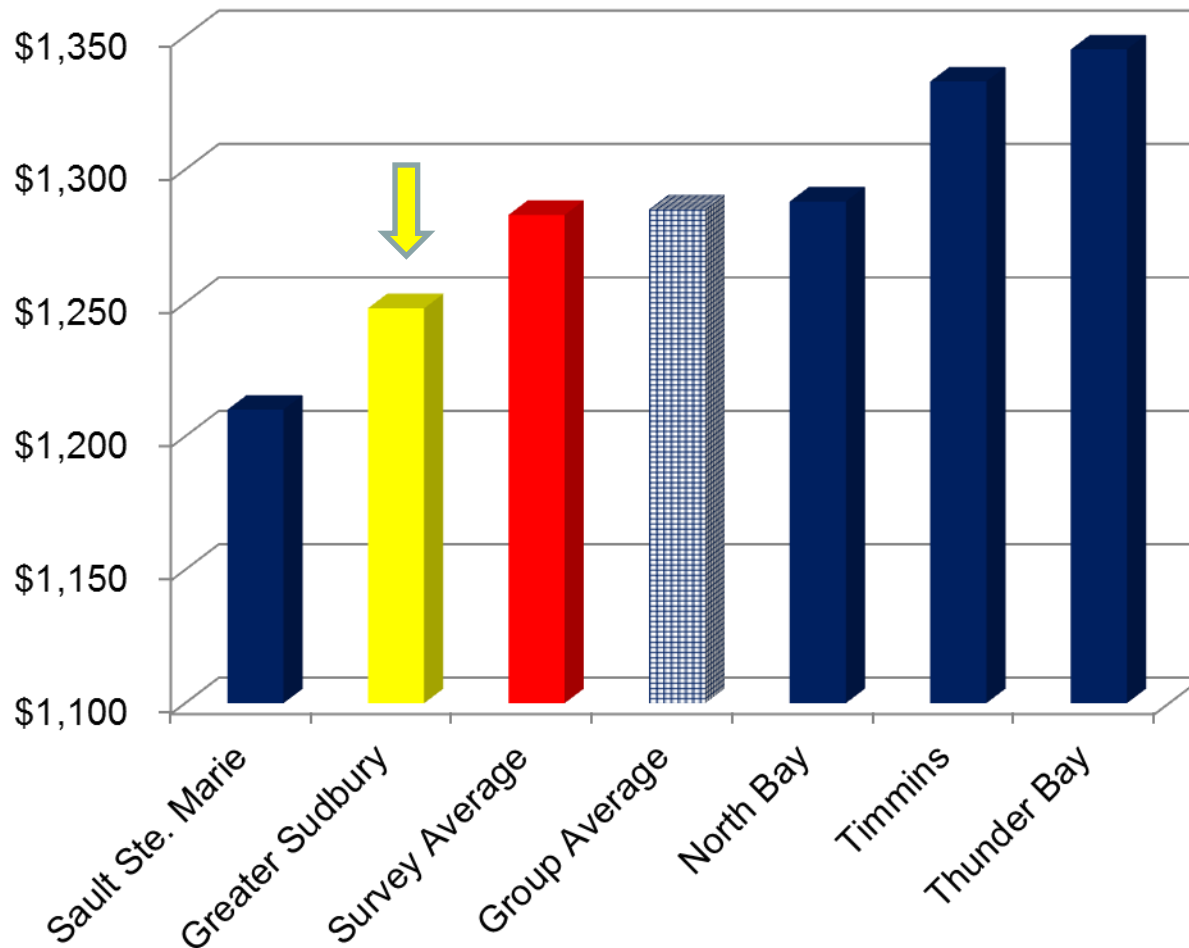
Greater Sudbury Building Permit Construction Value (in millions)





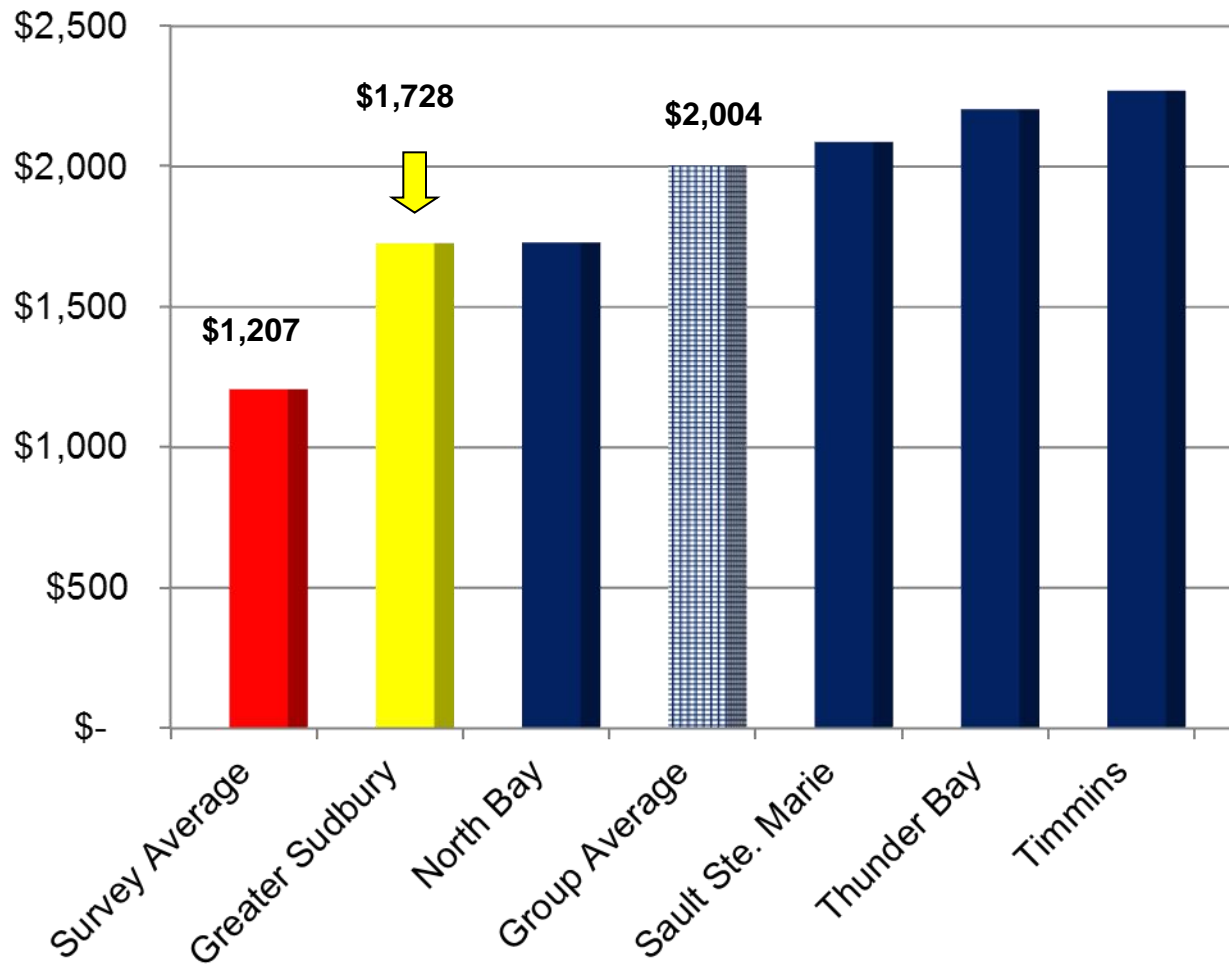
Municipal Financial Information

2011 Net Municipal Levy per Capita

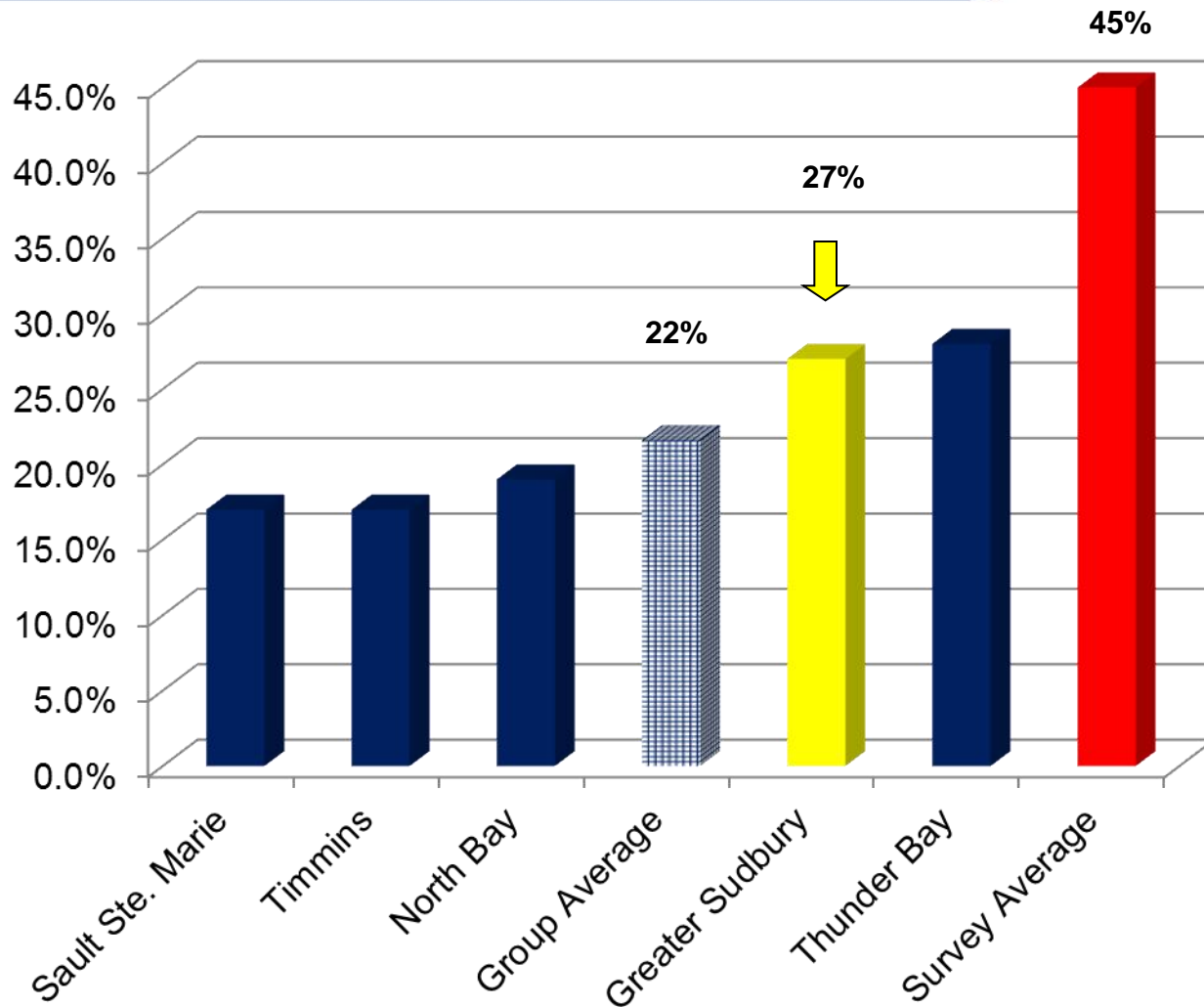


Below survey and group average and lower than most other northern municipalities in the Study

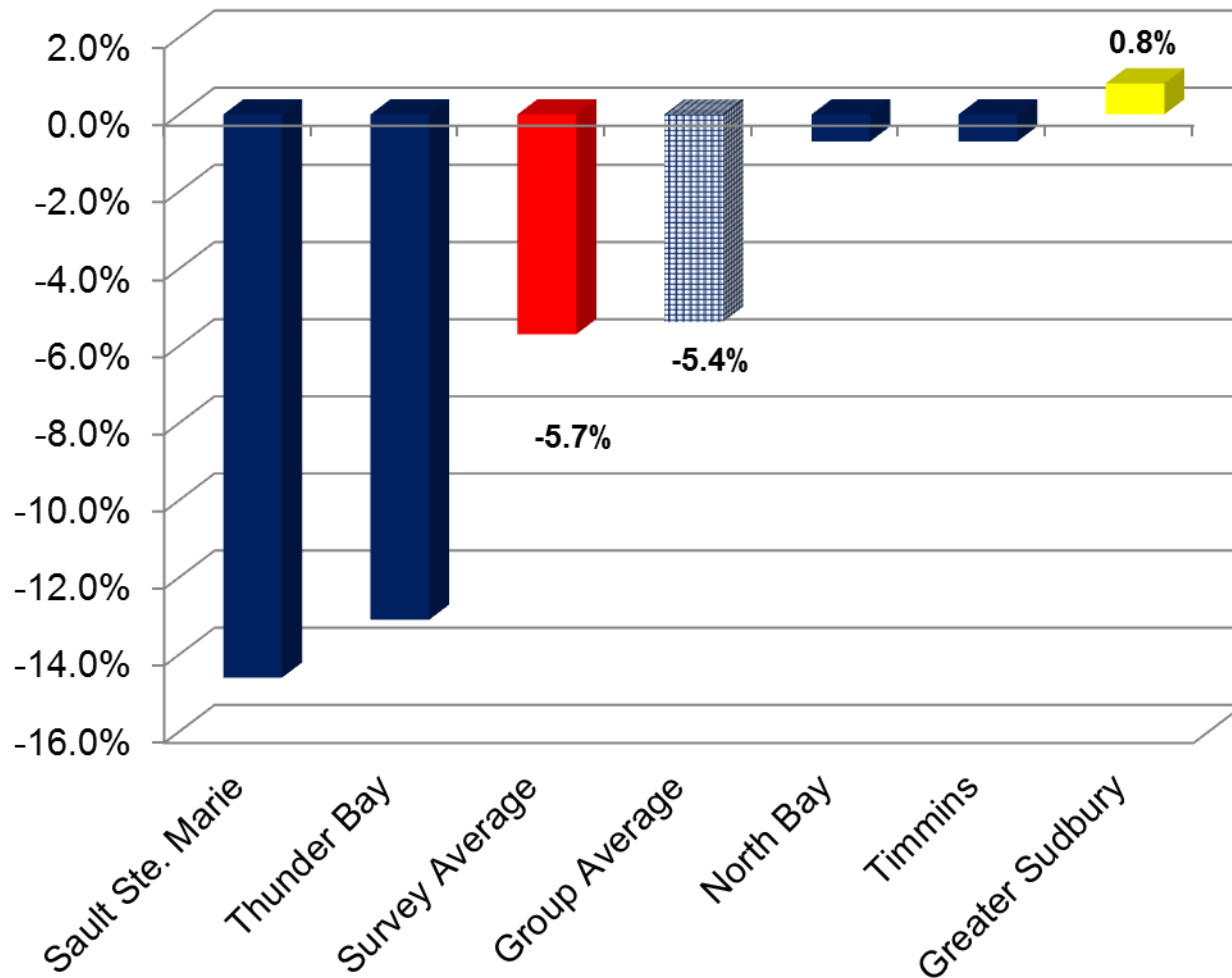
2011 Net Levy per \$100,000 Assessment



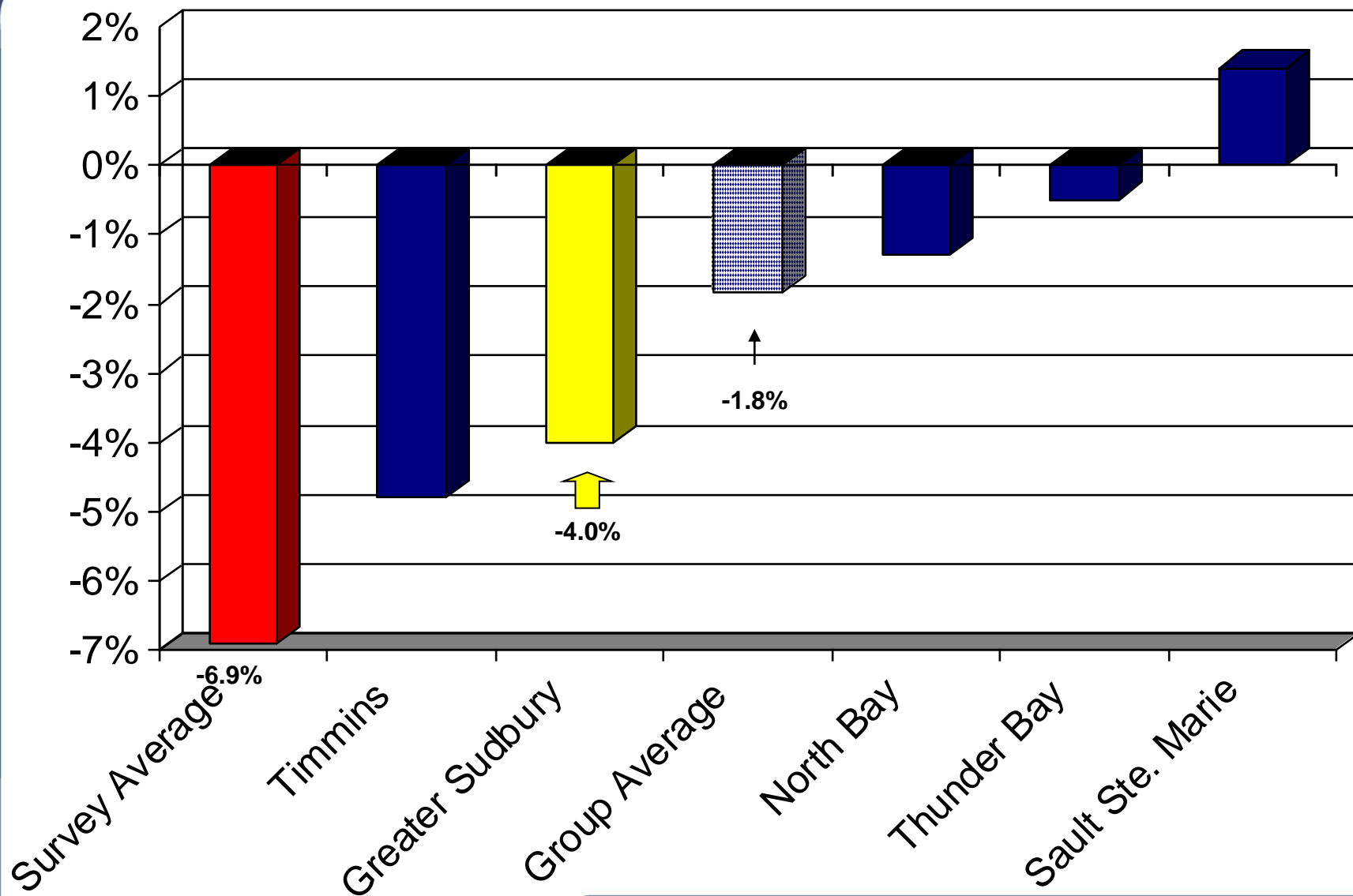
2010 Reserves as a % of Own Source Revenues



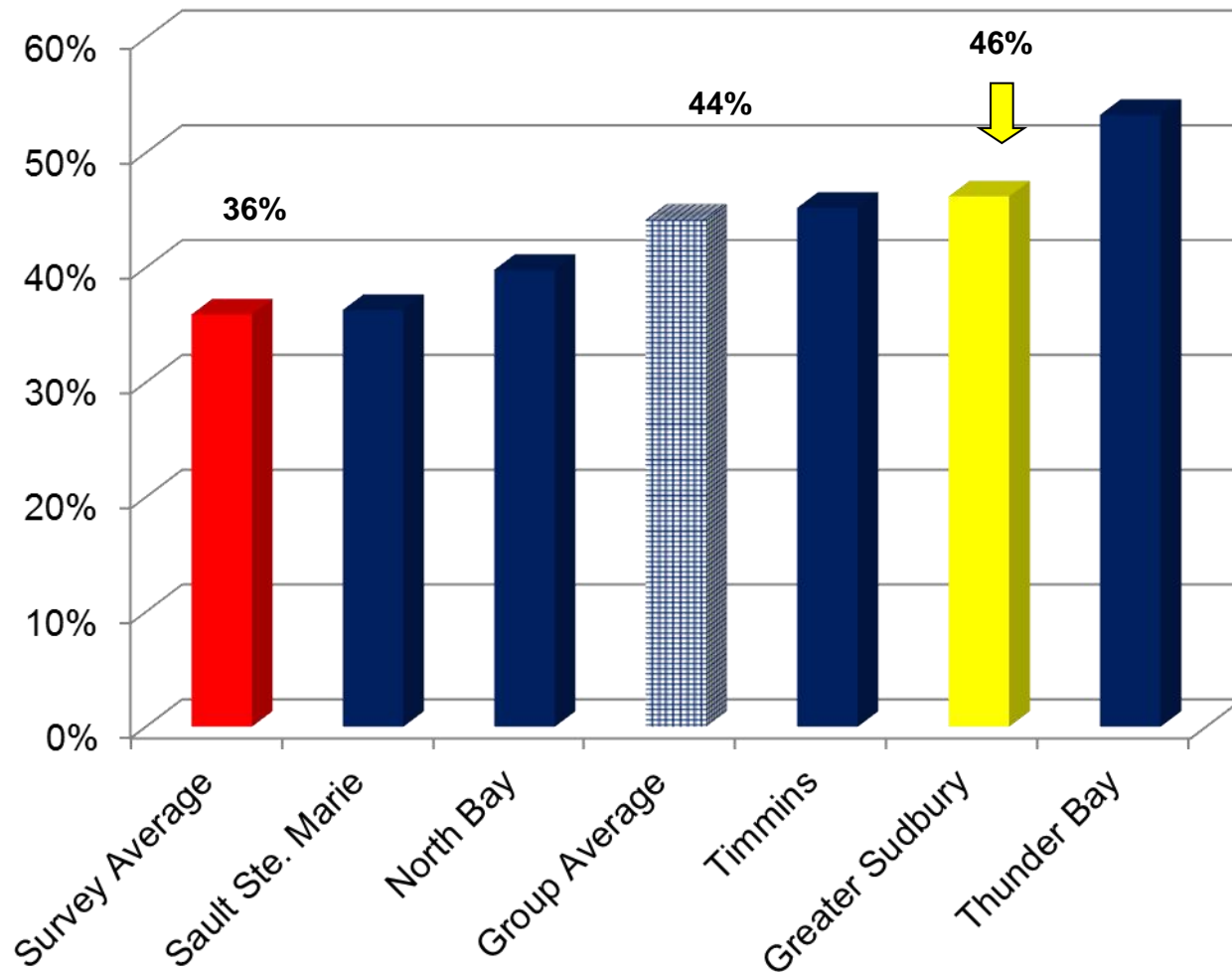
2010 Tax Supported Surplus Ratio



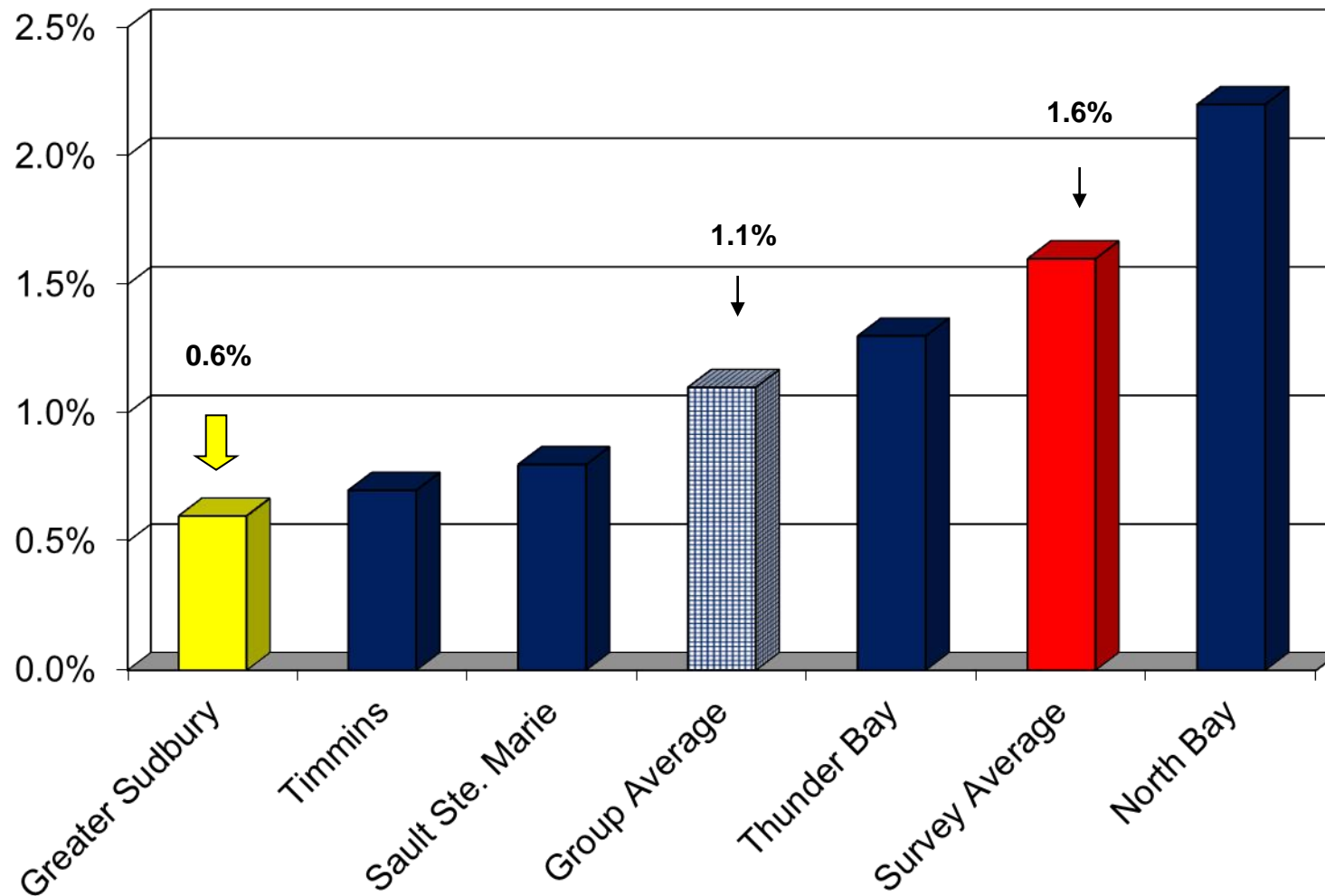
2009 Tax Supported Surplus Ratio



2010 Asset Consumption Ratio

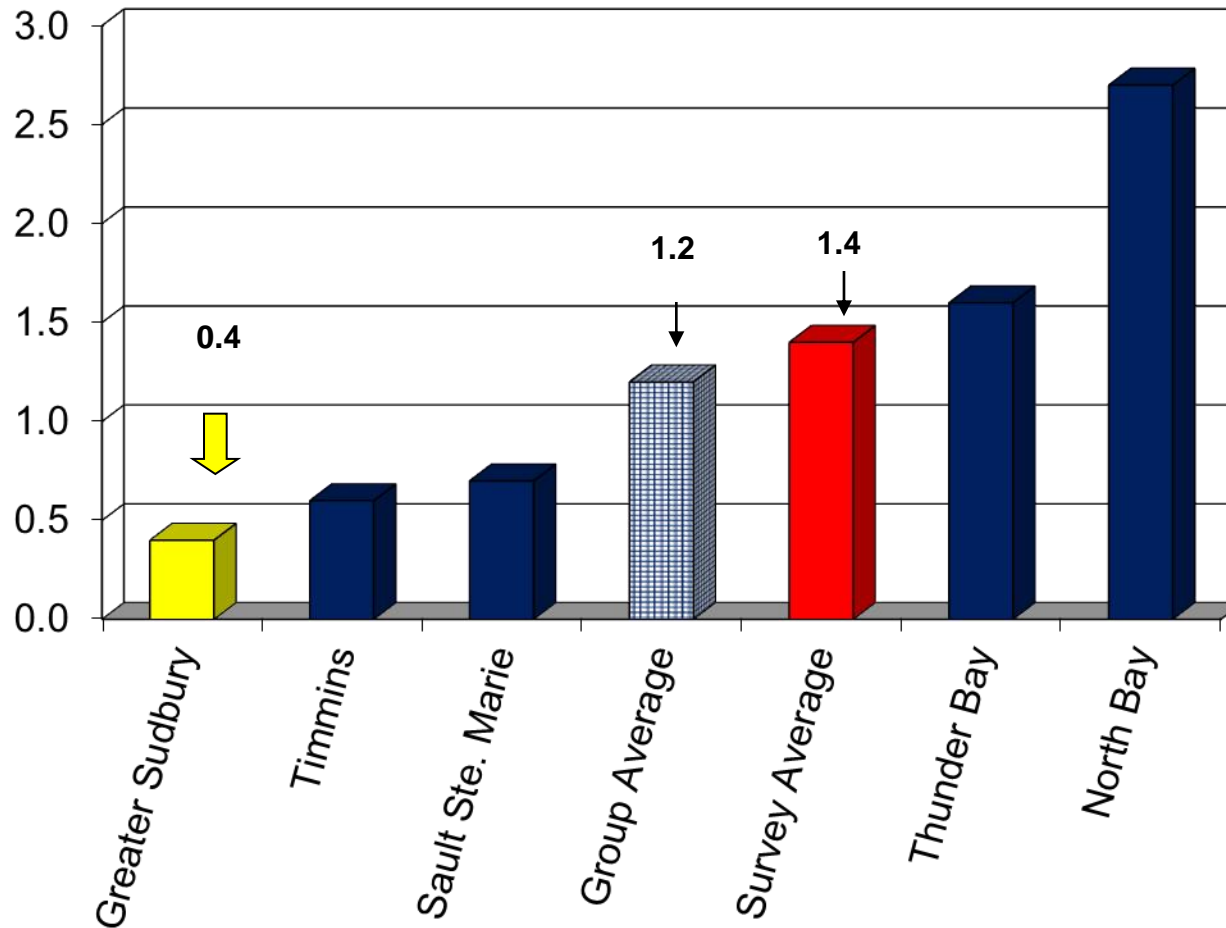


Tax Debt Interest as a % of Own Source Revenues



Debt in Greater Sudbury is significantly lower than the group and survey average

2010 Outstanding Debt to Reserve Ratio



Recommended to
have a ratio 1:1

For every dollar of
reserves, Sudbury
has \$0.40 of debt

2010 Expenditure Comparison

	Assistance to the Aged per capita	Storm cost per capita	Transit passenger trip	Fire \$100,000 assessment	Winter per lane km	Waste Disposal per tonne	Winter Control per capita
North Bay	\$ 41	\$ 28	\$ 57	\$ 220	\$ 45	\$ (10)	\$ 45
Sault Ste. Marie	\$ 10		\$ 89	\$ 175	\$ 59	\$ 24	\$ 59
Timmins	\$ 47	\$ 49	\$ 97	\$ 219	\$ 38	\$ (6)	\$ 38
Thunder Bay	\$ 61	\$ 19	\$ 94	\$ 137	\$ 106	\$ 37	\$ 106
Group Average	\$ 40	\$ 32	\$ 84	\$ 188	\$ 62	\$ 11	\$ 62
Survey Average	\$ 22	\$ 24	\$ 68	\$ 101	\$ 44	\$ 8	\$ 44
Greater Sudbury	\$ 26	\$ 9	\$ 59	\$ 134	\$ 62	\$ 10	\$ 62
	Below	Below	Below	Below	at	Below	at

The table below includes services where the cost in Sudbury is at or below the group average

2010 Expenditure Comparison

	Ambulance cost per capita	Public Health per capita	Social Housing per capita	Recreation Programming and Facilities per capita	Roadways per lane km	Recycling per tonne	Waste Collection per tonne
North Bay	\$ 38	\$ 26	\$ 81	\$ 80	\$ 208	\$ 24	\$ 17
Sault Ste. Marie	\$ 4	\$ 27	\$ 2	\$ 96	\$ 78		\$ (21)
Timmins	\$ 68	\$ 19		\$ 137	\$ 178	\$ 10	\$ 39
Thunder Bay	\$ 68	\$ 28	\$ 89	\$ 107	129	\$ (14)	\$ 23
Group Average	\$ 45	\$ 25	\$ 57	\$ 105	\$ 148	\$ 7	\$ 15
Survey Average	\$ 49	\$ 22	\$ 95	\$ 133	\$ 129	\$ 20	\$ 15
Greater Sudbury	\$ 47	\$ 33	\$ 113	\$ 121	\$ 203	\$ 35	\$ 29
	Above	Above	Above	Above	Above	Above	Above

The table above includes services where the cost in Sudbury is above the group average

2011 Development Charges – Single, Semi-Detached

Municipality	2010 Single Semi-Detached per unit
North Bay	\$ 6,160
Greater Sudbury	\$ 11,597
Sault Ste. Marie	none
Thunder Bay	none
Timmins	none
Group Average	\$ 8,879
Survey Average	\$ 22,496

Amongst the lowest residential development charges in the survey



Tax Policies

Summary of Tax Ratios - 2011

Property Type	Multi-Residential	Commercial	Industrial (Residual)	Industrial (Large)
Greater Sudbury	2.2667	2.1302	3.0255	3.4293
North Bay	2.2054	1.8822	1.4000	1.4000
Sault Ste. Marie	1.2597	1.8609	2.4007	3.4207
Thunder Bay	2.7400	1.9527	2.4300	2.4650
Timmins	1.6816	1.7501	2.1783	2.7114
Northern Group Average	2.0307	1.9152	2.2869	2.6853
Survey Average	2.0102	1.6867	2.2229	3.0554

- Greater Sudbury's tax ratios are higher than both the Northern Group and survey averages

2011 Total Property Tax Rates

Property Type	Residential	Multi-Residential	Commercial Residual	Office Building	Shopping Centre	Industrial Residual	Large Industrial
North Bay	1.6723%	3.4096%	4.0428%	4.0428%	4.0428%	3.3478%	3.3478%
Sault Ste. Marie	1.9425%	2.3869%	4.5149%	5.9817%	4.7110%	5.4283%	7.1697%
Thunder Bay	1.9731%	5.0044%	4.7318%	4.7318%	4.7318%	5.6330%	5.6243%
Timmins	2.0572%	3.3019%	4.5260%	4.5260%	4.5260%	5.3080%	6.2816%
Group Average	1.9113%	3.5257%	4.4539%	4.8206%	4.5029%	4.9293%	5.6059%
Survey Average	1.3315%	2.3521%	3.1593%	3.1786%	3.1804%	4.1120%	4.2959%
Greater Sudbury	1.6558%	3.4606%	4.3249%	4.3249%	4.3249%	5.5836%	6.1512%

Sudbury's tax rates in Residential, Multi-Residential and Commercial are below the group average



Comparison of Relative Taxes

Property Types

- ☐ Detached Bungalow
- ☐ Senior Executive

- ☐ Neighbourhood Shopping
- ☐ Office Building
- ☐ Hotel
- ☐ Motel

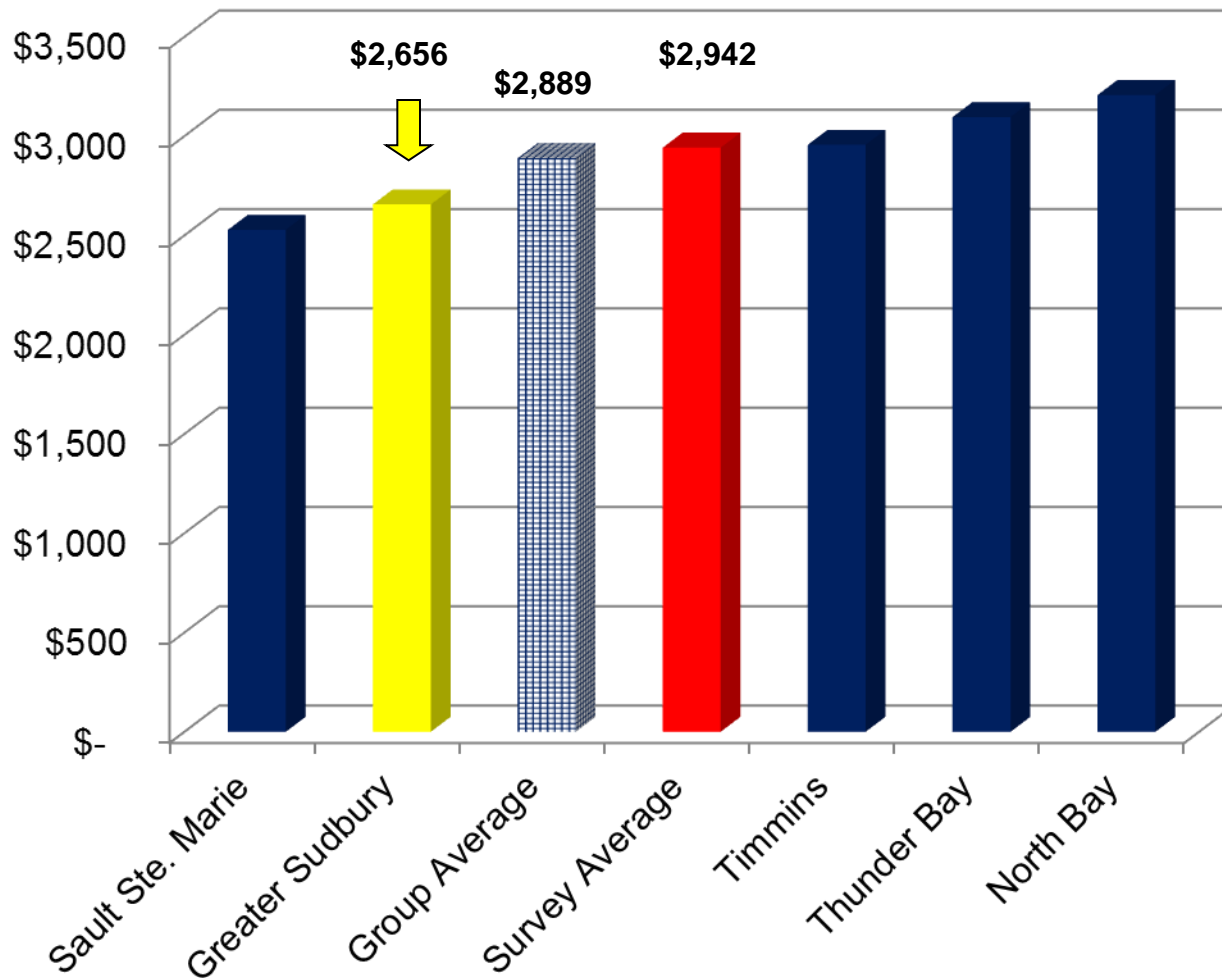
- ☐ Walk-up Apartment
- ☐ High-rise Apartment

- ☐ Vacant Land Industrial
- ☐ Large Industrial
- ☐ Standard Industrial

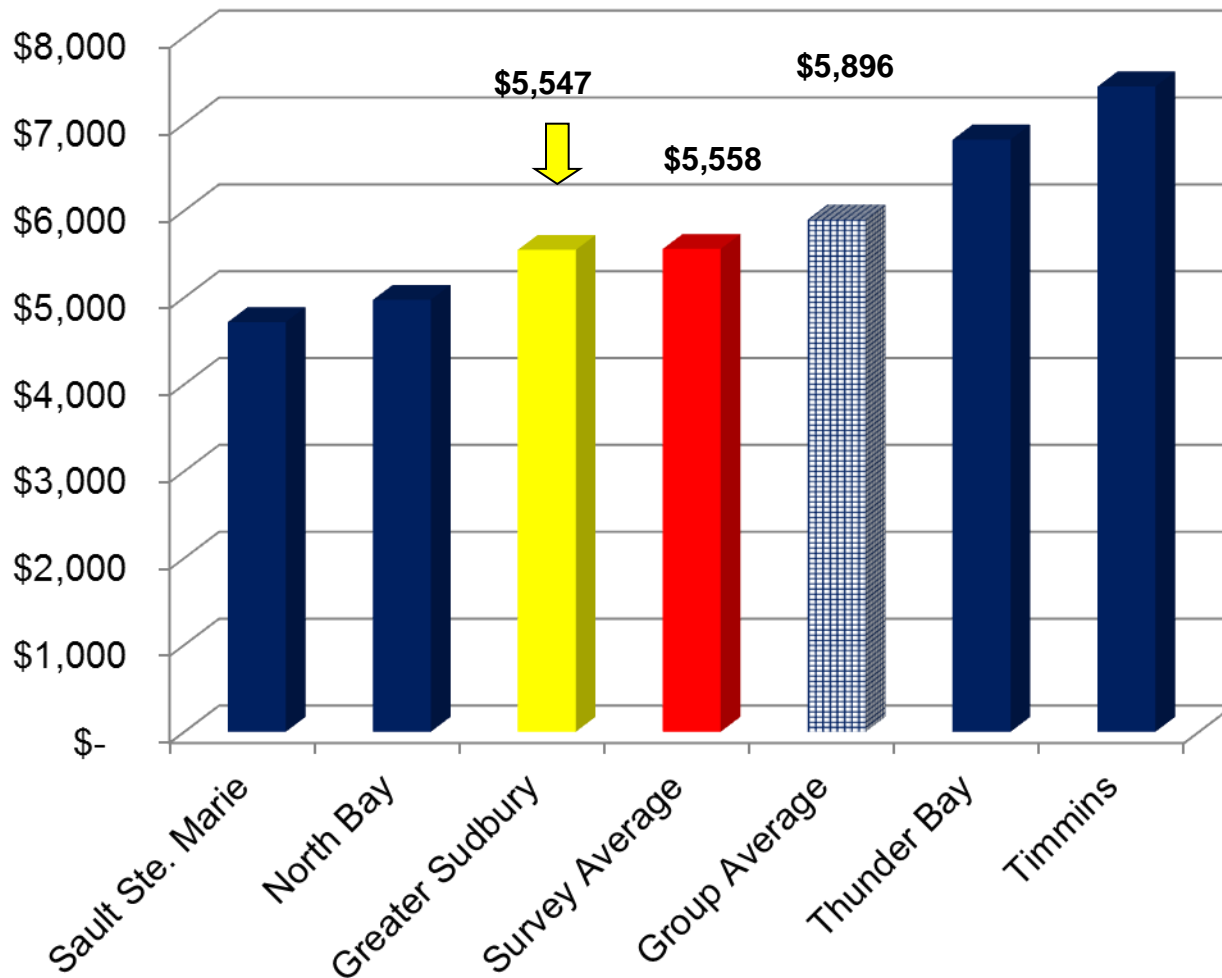


- Comparable properties are used across the 84 municipalities
- Multiple properties are included in each municipality
- Focus should be on the trends rather than the absolutes

2011 Residential Detached Bungalow



2011 Senior Executive Home

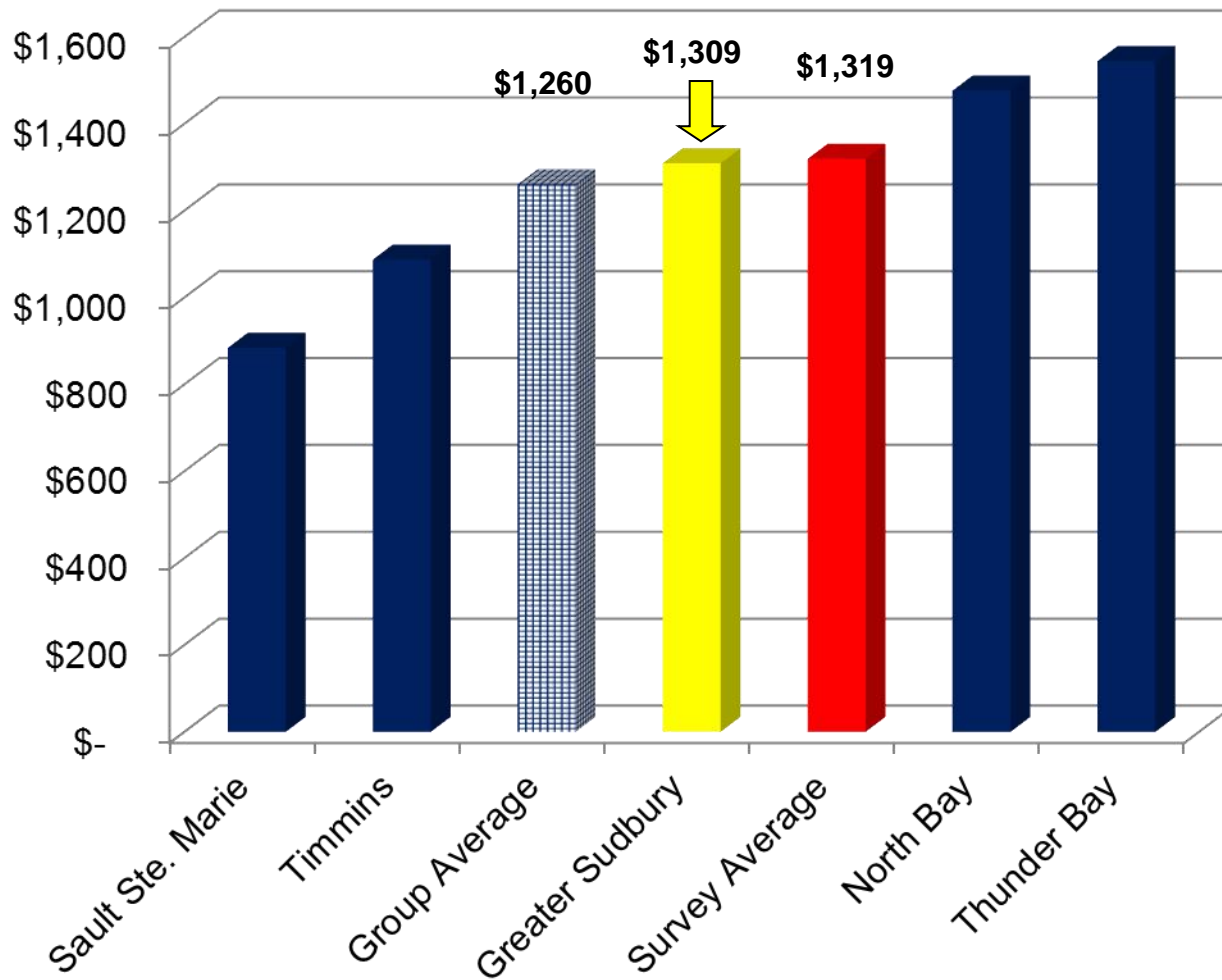


2011 Residential - Summary

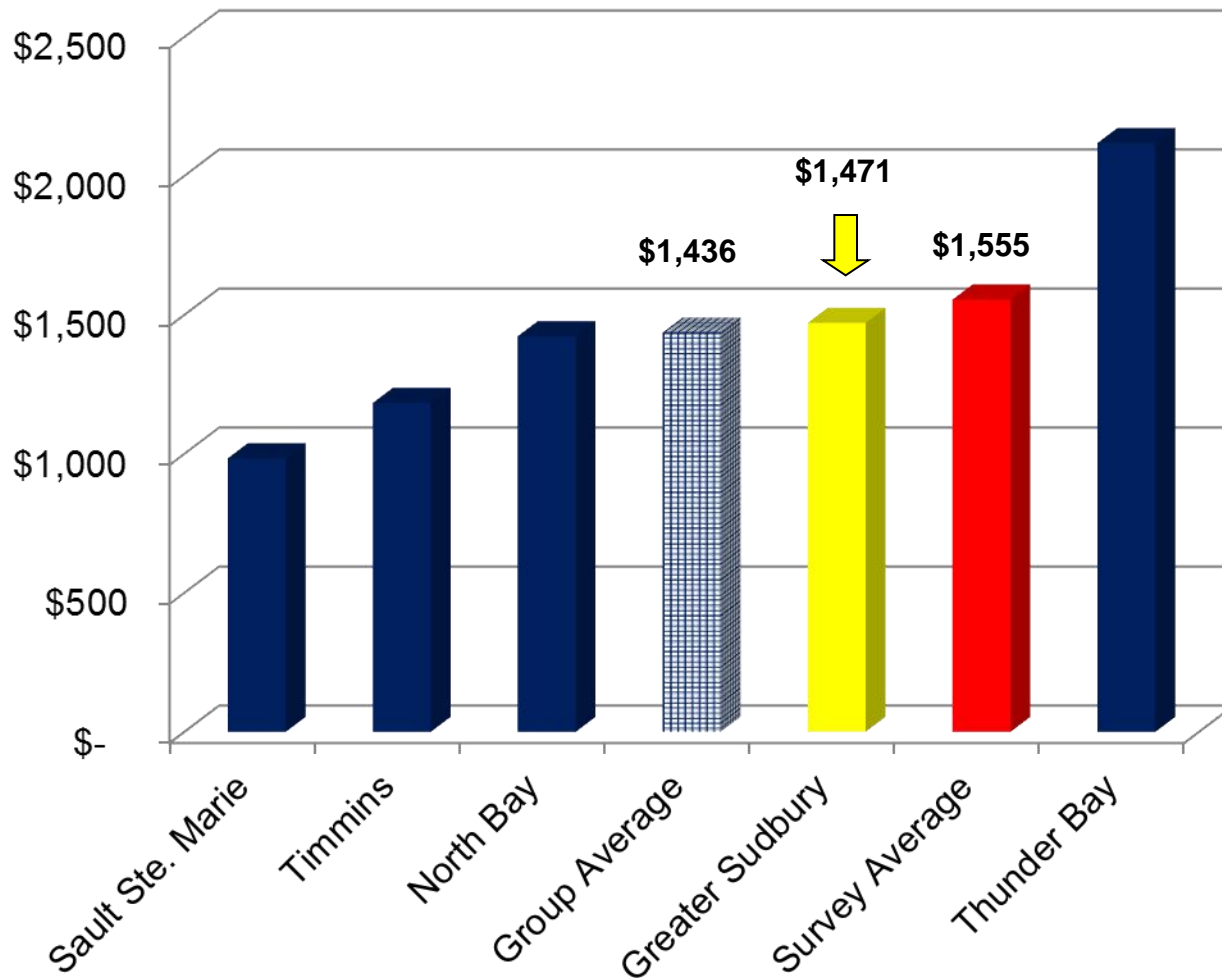
- In relation to the other Northern municipalities in the survey, Greater Sudbury's relative tax position for the blended two residential classes is "low-mid"

low

2011 Multi-Residential Walk Up (per unit)



2011 Multi-Residential Mid/High Rise (per unit)



2011 Multi-Residential - Summary

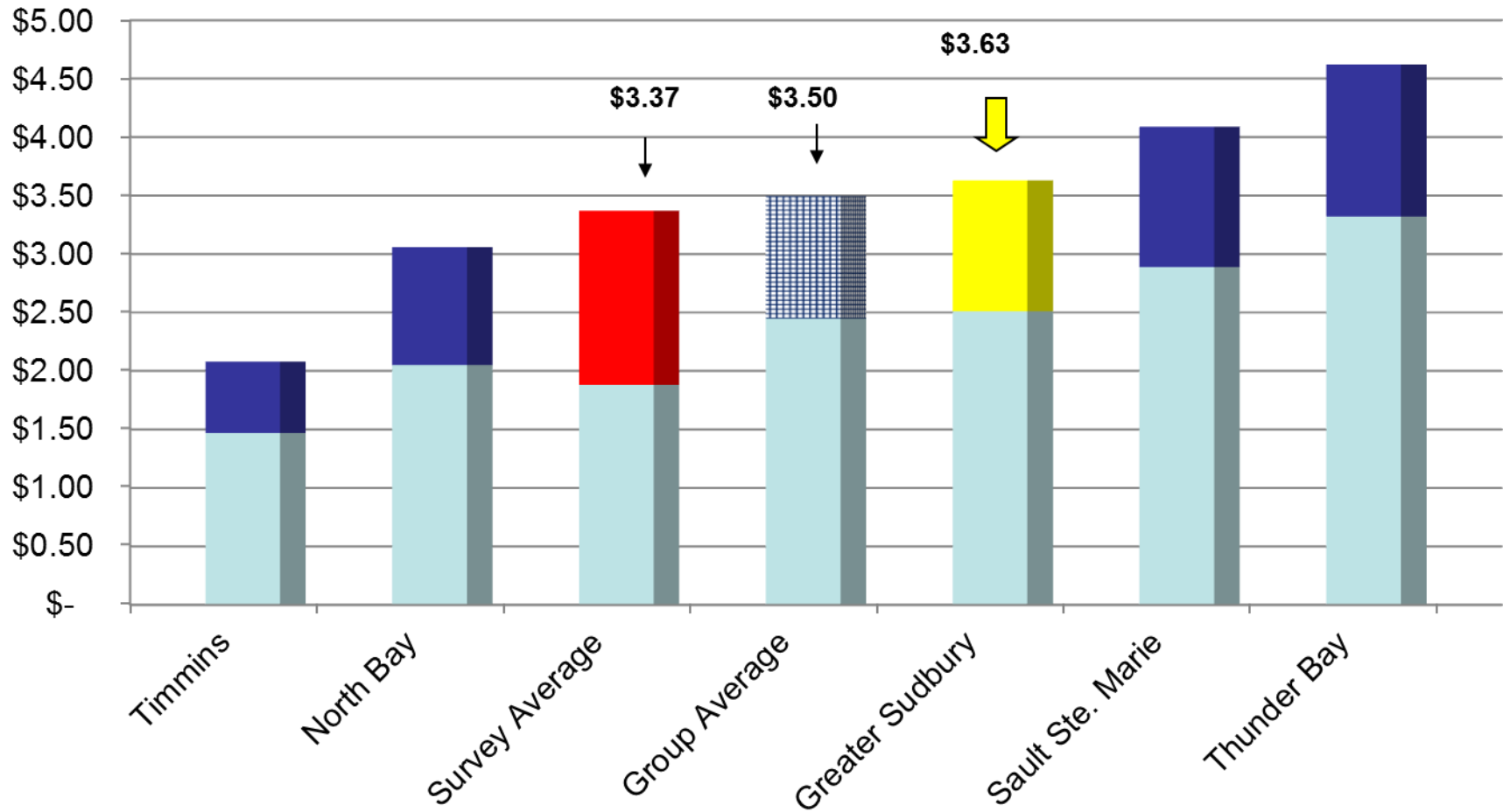
- In relation to the other Northern municipalities in the survey, Greater Sudbury's relative tax position for the blended two multi-residential classes is "low-mid"



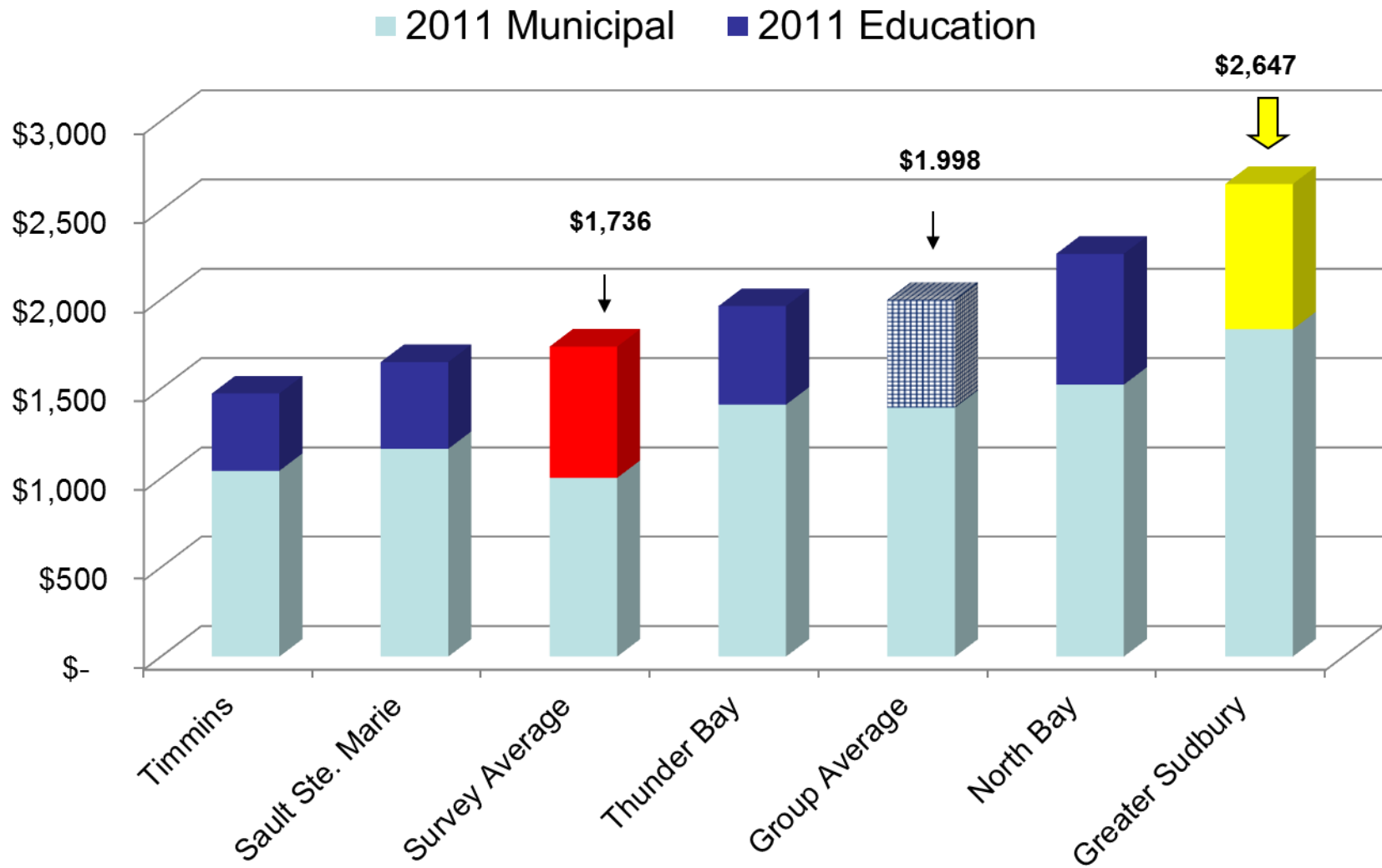
Mid

2011 Neighbourhood Shopping(\$ per sq. ft.)

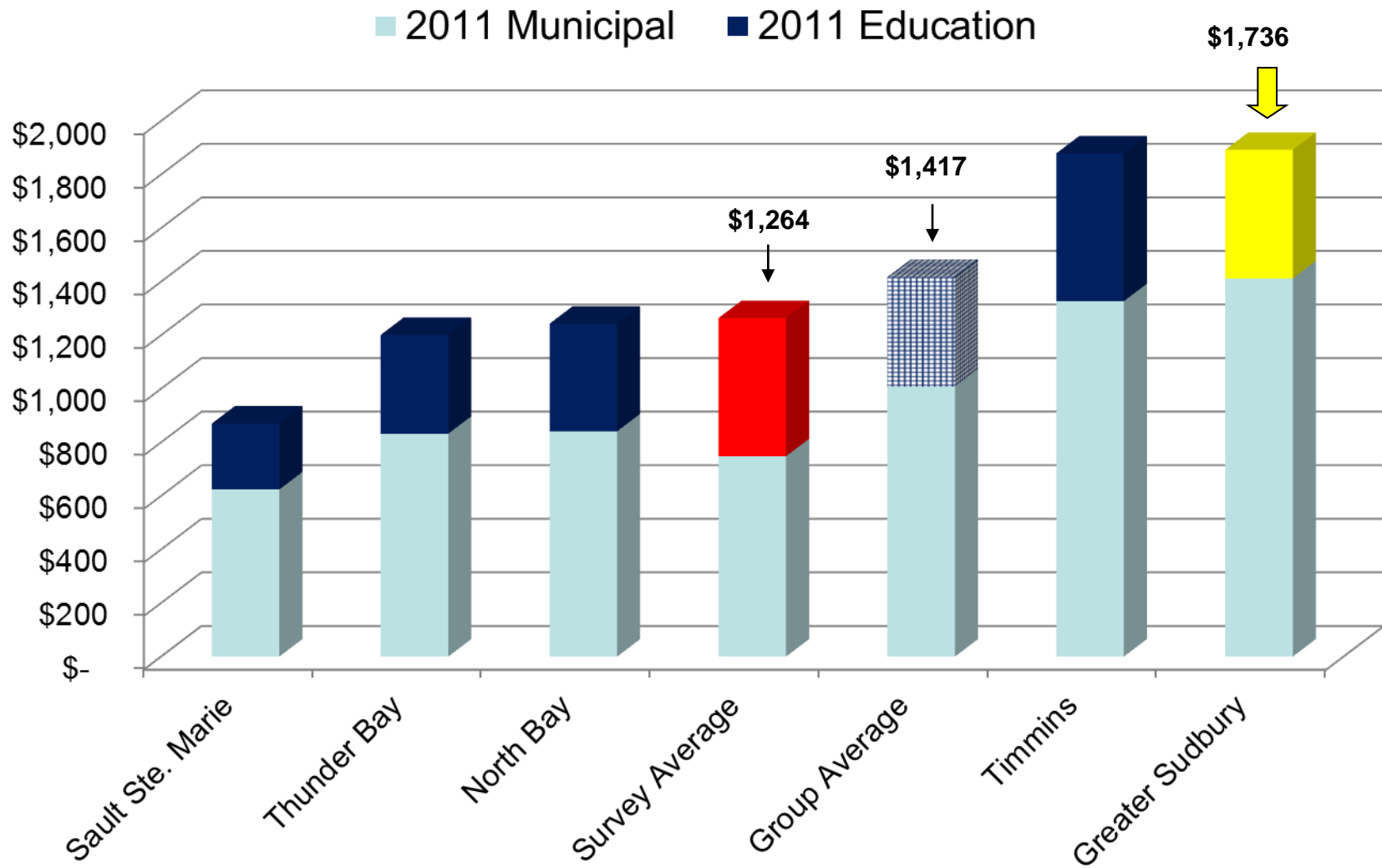
2011 Municipal 2011 Education



2010 Hotel (\$ per unit)

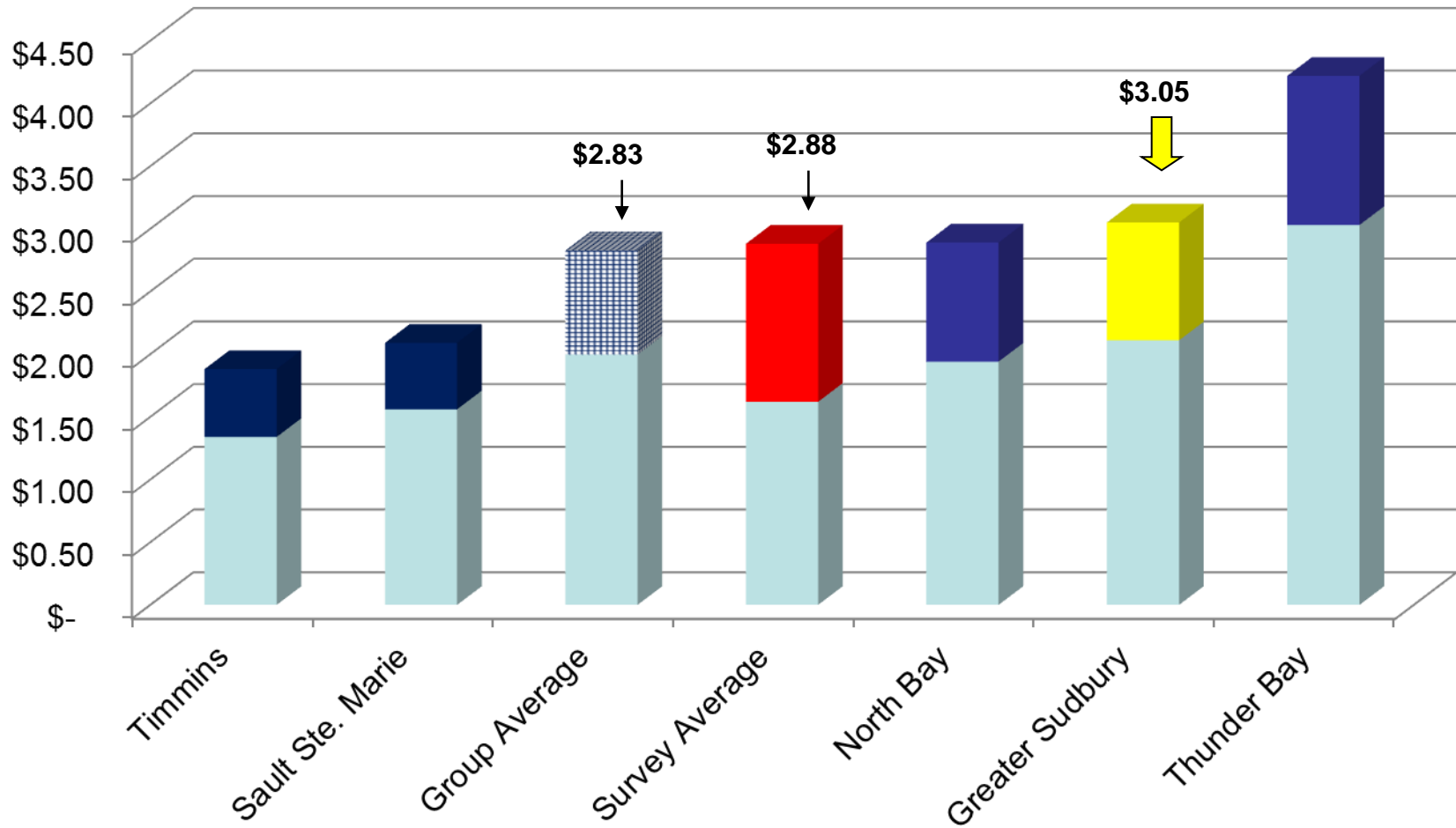


2011 Motel (\$ per unit)



2011 Office (\$ per unit)

2011 Municipal 2011 Education



2011 Commercial - Summary

- In relation to the other Northern municipalities in the survey, Greater Sudbury's relative tax position

Mid

Office

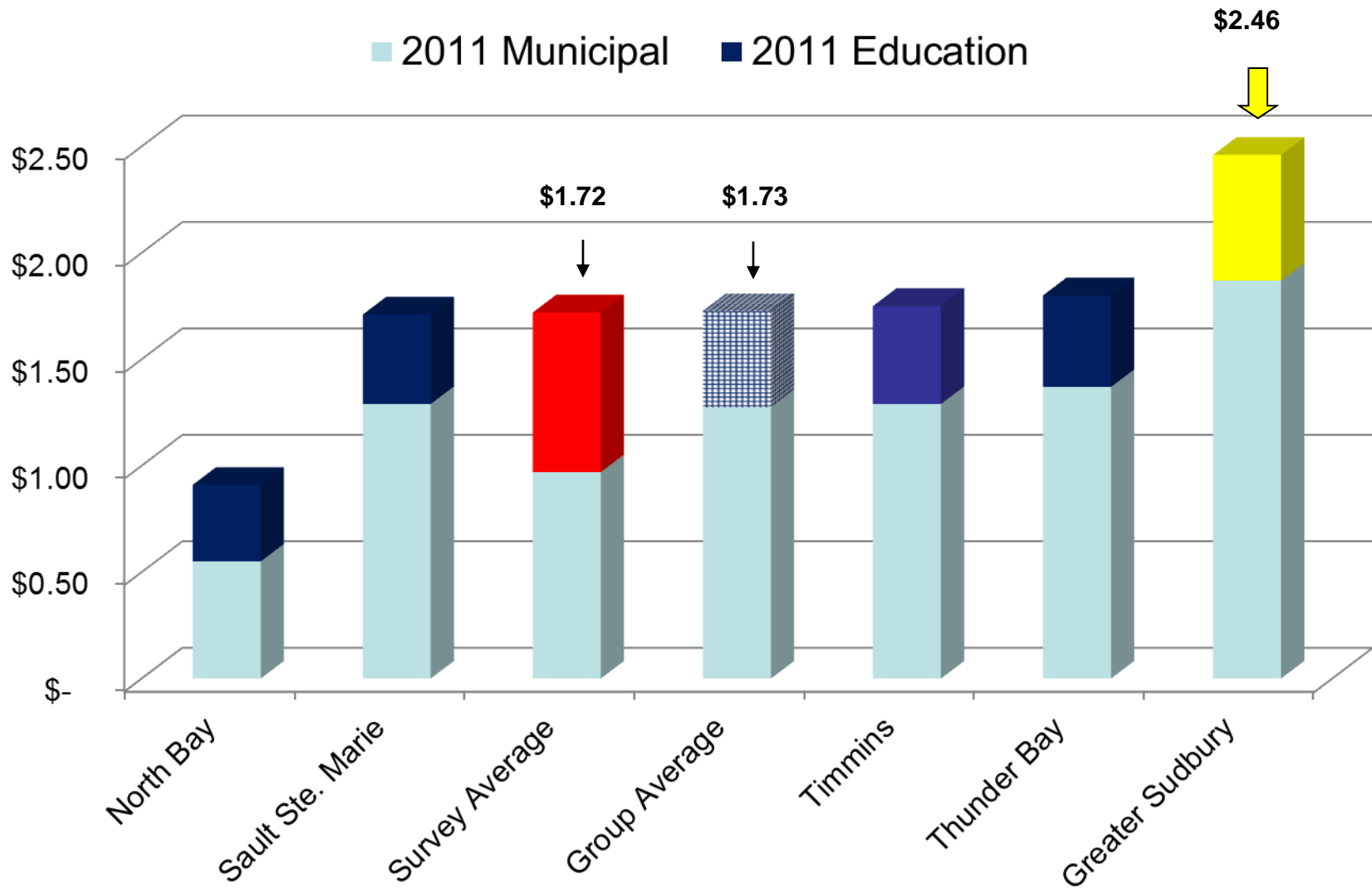
Mid

Neighbourhood Shopping

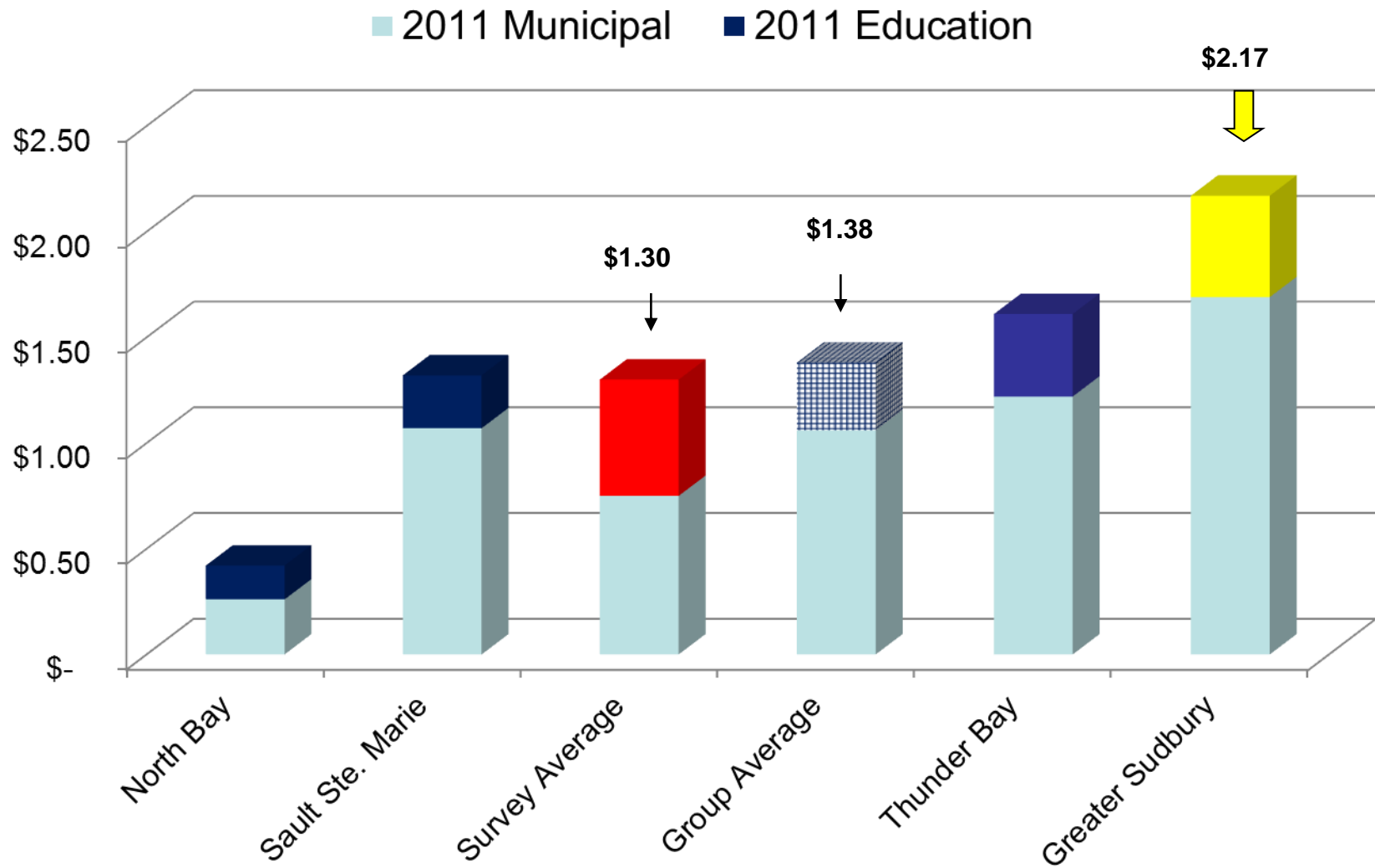
High

Hotel/Motel

2011 Standard Industrial (\$ per sq. ft.)



2011 Large Industrial (\$ per sq. ft.)



2011 Industrial - Summary

- In relation to the other Northern municipalities in the survey, Greater Sudbury's relative tax position for industrial classes are:

High

2011 “Like” Property Comparison: Summary

Municipality	Residential	Multi-Residential	Commercial	Industrial
Greater Sudbury Full Survey	low	mid	mid-high	high
Greater Sudbury Northern Municipalities	low	mid	mid-high	high

A close-up photograph of a water faucet with a single drop of water falling from it. The background is blurred, showing what appears to be a blue cloth or wall. The text "Comparison of Water/Sewer Costs" is overlaid in white.

Comparison of Water/Sewer Costs

2011 Water/Sewer Cost Summary

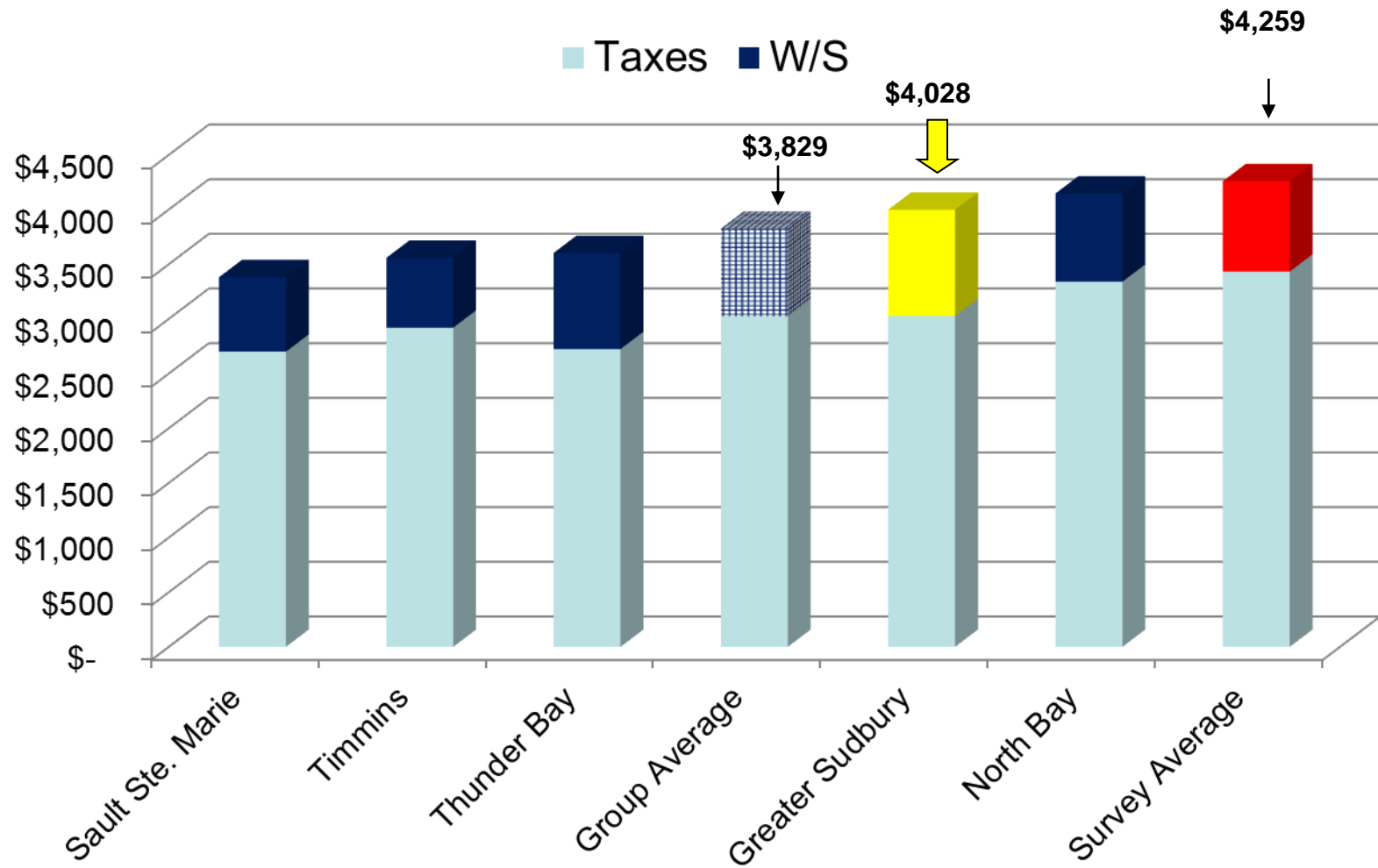
Municipality - Water & Sewer Costs Volume Meter Size	Residential 250 m3 5/8"	Commercial 10,000 m3 2"	Industrial 30,000 m3 3"	Industrial 100,000 m3 4"	Industrial 500,000 m3 6"
Sault Ste. Marie	\$ 681	\$ 18,603	\$ 50,631	\$ 161,729	\$ 794,815
Timmins	\$ 638	\$ 21,958	\$ 65,875	\$ 219,584	\$ 1,097,923
North Bay	\$ 807	\$ 16,208	\$ 44,306	\$ 142,651	\$ 704,619
Thunder Bay	\$ 879	\$ 16,879	\$ 45,766	\$ 140,569	\$ 671,190
Northern Group Average	\$ 751	\$ 18,412	\$ 51,645	\$ 166,133	\$ 817,137
Total Survey Average	\$ 825	\$ 24,777	\$ 72,415	\$ 235,173	\$ 1,157,145
Greater Sudbury	\$ 972	\$ 24,516	\$ 71,920	\$ 233,880	\$ 1,153,349
% difference from Group Average	29%	33%	39%	41%	41%
% Difference from Survey Average	18%	-1%	-1%	-1%	0%

Greater Sudbury's water/sewer costs are above the Northern Average but are the same as the total survey average of 84 Ontario municipalities for commercial and industrial consumptions

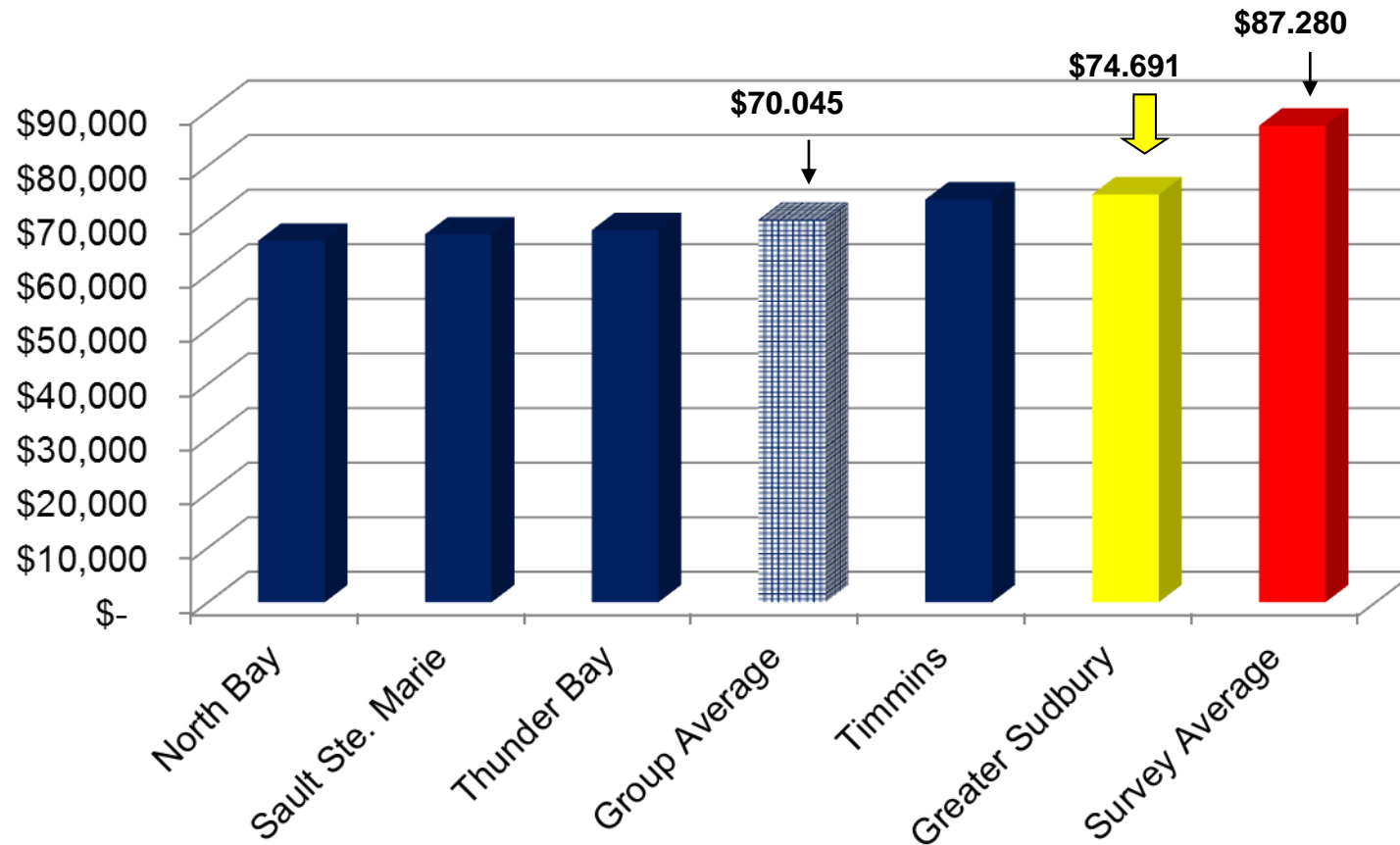


Taxes as a % of Income

Average Residential Taxes & Water/Sewer Rates

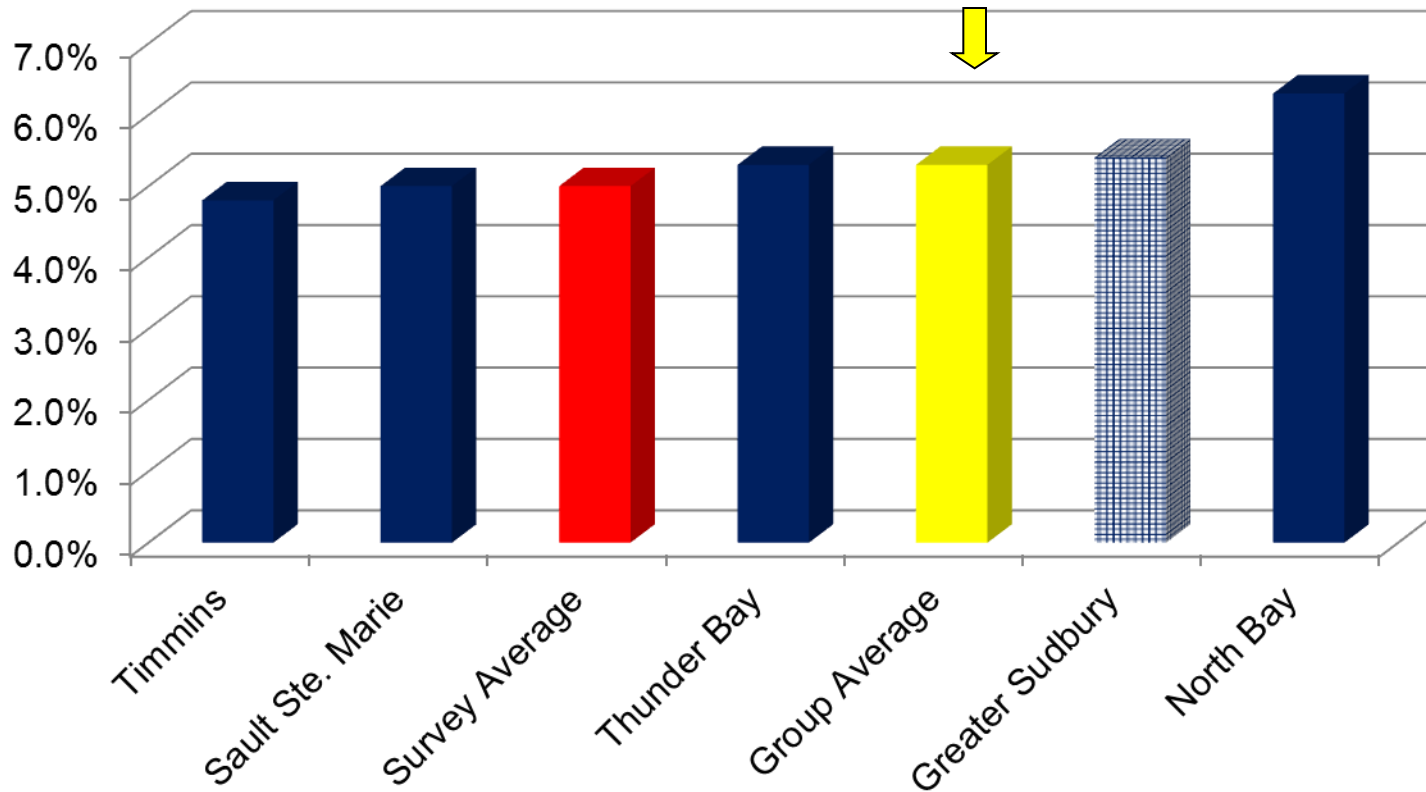


2011 Average Household Income



Greater Sudbury's average household income is below the total survey of 84 municipalities, but is above the group average for the Northern municipalities

2011 Property Taxes + W/S as a % of Income



Greater Sudbury's property taxes + W/S as a percentage of income is 5.4%, slightly below the group average of 5.3%

Greater Sudbury Summary

- Unweighted assessment is below average - 9th lowest in the entire survey – this poses challenges in funding municipal programs and services
- Building permit activity higher than Northern average
- Net municipal levy per capita in low range of group and mid in the survey
- Relatively low reserves but also low debt
- Low relative tax burden in residential and mid in multi-residential classes
- Mid-High relative tax burdens in commercial and high in industrial
- Water/Sewer rates are above the Northern average
- Municipal burden as percentage of income is slightly higher than the Northern average