



Message from the CAO

Mayor Bigger and Members of Council,

The proposed 2020 Budget describes the anticipated service outcomes and supporting financing plans required by the municipality and its service partners. It reflects the direction provided by Council's Strategic Plan and emphasizes results that demonstrate its vision for Greater Sudbury: To be a centre of excellence and opportunity – a vibrant community of communities living together.

The 2020 Budget follows the directions Council provided in the second quarter of 2019. Particularly, the proposed budget adheres to the direction for a plan that requires no more than a 3.5% property tax levy change. Council may recall the updates provided throughout the budget development process and will recognize this direction was particularly challenging to follow. A combination of factors, including changes in provincial funding for cost-shared services, planned changes in costs associated with capital financing decisions made in prior periods, and increased costs for inputs required to support daily programs and services all significantly influenced the choices involved in preparing the 2020 Budget.

The proposed 2020 operating budget is \$614.9 million. This includes costs required for supporting municipal services and service partners. Noteworthy features of the operating budget include increased emphasis on road maintenance and renewal work, more resources to support winter control services and additional financial support requirements for service partners, such as the Greater Sudbury Police Service, Public Health Sudbury and Districts and Conservation Sudbury. To facilitate these types of cost increases, other service adjustments needed to be made to adhere to the financial guideline included in the 2020 Budget Directions. These adjustments include the reduction or elimination of some services, a choice to increase the risk actual prices will be higher than planned for commodities required to support routine operations, a reduction in the annual financial transfer to support the capital budget, and new salary and benefit cost controls. More details are provided in this document, and will be highlighted again in the staff report that will be published to support the Finance and Administration Committee's deliberations at its December 3 meeting.

The proposed 2020 Capital Budget is \$162.1 million. Emphasis is on asset renewal, continuing the work required to advance the multi-year projects approved in prior periods and the introduction of long-awaited technology solutions that will support significant service improvements. Approximately half of the 2020 capital budget is dedicated to roads and drainage projects. Other noteworthy features include continued investment in transit fleet renewal, equipment to support more road maintenance activities, and progress on Council's Large Projects.

Notwithstanding the improvements that will be produced by the proposed capital budget, staff believe longstanding asset condition issues could be further addressed with the introduction of a special capital levy. Like most municipalities, Greater Sudbury underinvested for decades in asset





maintenance and renewal. Now, it experiences unplanned maintenance costs or service interruptions that reflects the generally advanced age of its infrastructure. If a special levy is approved, staff would prepare a report in the first quarter of 2020 describing and recommending specific roads projects for inclusion in the capital plan, although Council retains full discretion to direct where these funds would be applied.

As described in this document in more detail, Greater Sudbury's economy is performing well and the municipal corporation's financial condition is strong. By any objective measure, Greater Sudbury has the conditions and potential to realize the desired outcomes Council described in its Strategic Plan.

2019 has been successful for many reasons, and it is reasonable to anticipate we will produce similarly positive results in 2020. The collaboration and trust between Council and staff is a key factor in our organization's performance, as is the staff expertise that went into preparing a budget which accurately reflects the links between services, service levels and costs. With a focus on Council's strategic priorities and properly resourced plans, I am confident we will produce results that continue to build trust and confidence with the community we serve. I thank Members of Council for having the trust in staff to implement Council's vision, and for their support throughout the year.

I also thank staff for the continued focus, dedication and commitment they offer every day to our city. I am proud of the work my team produces and their daily commitment to serving the community in which we all live, work and play.

Respectfully submitted,

A handwritten signature in black ink, appearing to read 'Ed Archer'.

Ed Archer
Chief Administrative Officer
City of Greater Sudbury



Mayor and Council

Greater Sudbury City Council is the decision-making body for the organization of the City of Greater Sudbury. It makes decisions about how municipal services are provided to residents, the level of services provided and how to pay for them.

Our Council is composed of the Mayor, who represents the city as a whole, and 12 Councillors, each of whom represents a ward, or geographic area, of the community.

The role and authority of Council is established under the Municipal Act. Council is elected for a four-year term. The current term of office runs from December 1, 2018, to November 14, 2022.

Council meets the second and fourth Tuesday of the month and meetings are streamed online at greatersudbury.ca/livestream.



Mayor	Brian Bigger
Ward 1	Mark Signoretti
Ward 2	Michael Vagnini
Ward 3	Gerry Montpellier
Ward 4	Geoff McCausland
Ward 5	Robert Kirwan
Ward 6	René Lapierre
Ward 7	Mike Jakubo
Ward 8	Al Sizer
Ward 9	Deb McIntosh
Ward 10	Fern Cormier
Ward 11	Bill Leduc
Ward 12	Joscelyne Landry-Altmann

Various Committees meet throughout the month including Planning, Operations, Community Services, Emergency Services, Hearing, Finance and Administration, and Audit.



Executive Leadership Team

The Chief Administrative Officer (CAO) must ensure policies and procedures are in place to implement Council’s decisions. The CAO works with a team of Executive Leaders. There are four General Managers accountable for four City departments: Corporate Services, Community Development, Community Safety and Growth and Infrastructure. Each General Manager reports directly to the CAO and they, along with key advisory positions that include finance, communications, economic development and strategic initiatives, make up the organizations’s Executive Leadership Team (ELT).



Ed Archer
Chief Administrative Officer



Kevin Fowke
General Manager of Corporate Services



Steve Jacques
General Manager of Community Development



Tony Cecutti
General Manager of Growth and Infrastructure



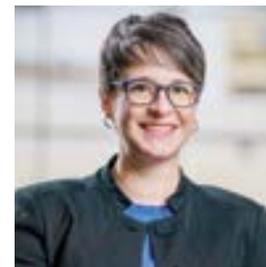
Joseph Nicholls
General Manager of Community Safety



Ian Wood
Executive Director of Strategic Initiatives, Communications and Citizen Services



Ed Stankiewicz
Executive Director of Finance, Assets and Fleet



Meredith Armstrong
Acting Director of Economic Development



Marie Litalien
Acting Director of Communications and Community Engagement



Greater Sudbury in 2019



330

freshwater lakes



3,228

square kilometres,
the largest municipality in
Ontario



58

municipal service
areas



177

kilometres of
non-motorized trails

Our Population



166,000

population
(2016 Census)



1,600

new residents welcomed
to Greater Sudbury
2011 to 2016



26%

of residents identify French
as their mother tongue



9%

of residents identify as
Indigenous

Our Transportation Network



3,600

lane kilometres
of roadway



4,063,000

GOVA transit
trips per year



59

GOVA Plus buses on
23 routes



250,000

passengers travelling
to and from the
Greater Sudbury
Airport
(average over 5 years)



35

kilometres of cycling
infrastructure

Our Educational Institutions



3

post-secondary institutions:
Collège Boréal, Cambrian College
and Laurentian University



595

Medical Doctor graduates
from Northern School of Medicine
since 2009

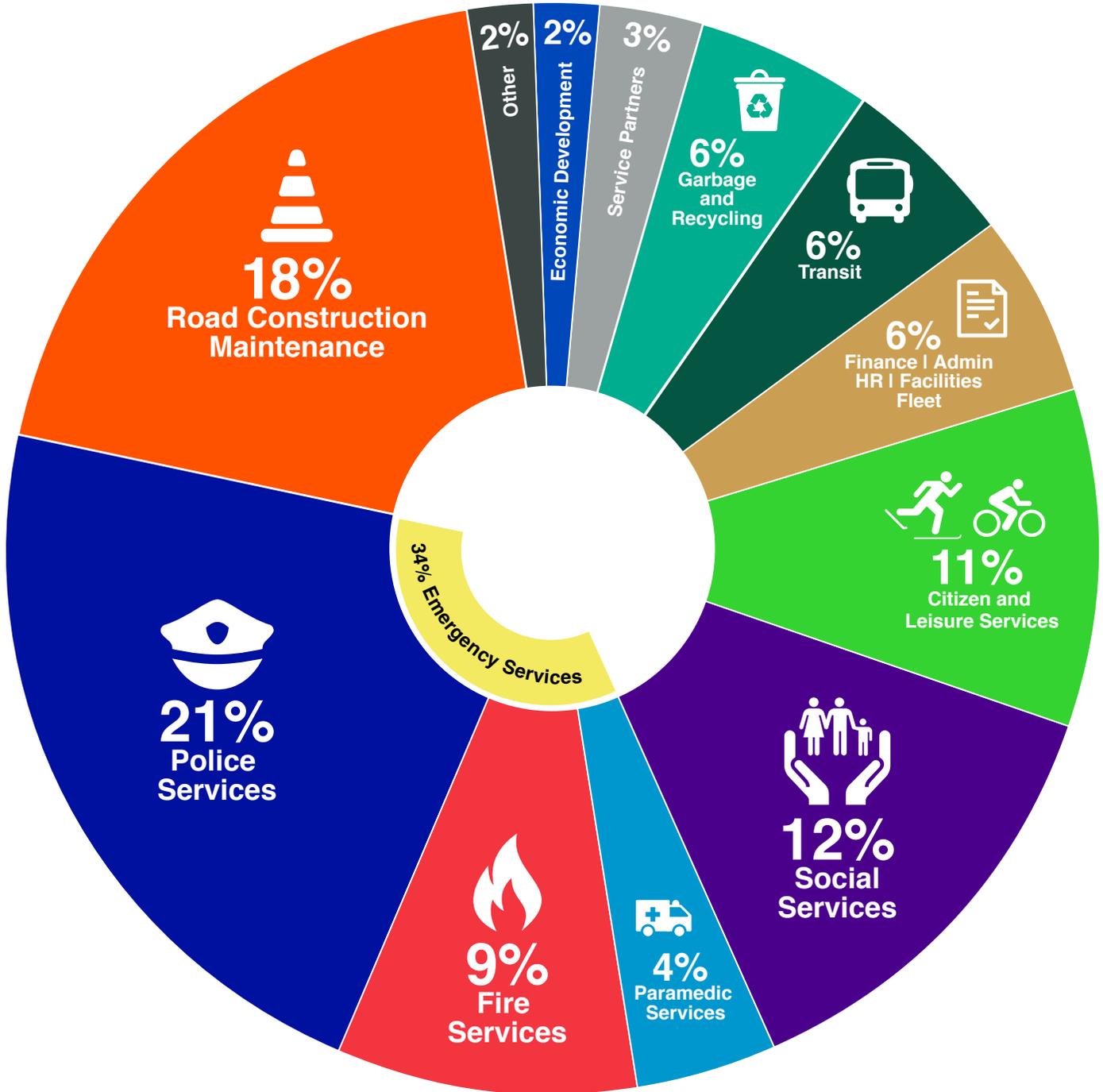


1,510

post-secondary international
students in 2019



Where do your taxes go?





Organizational Focus

The City of Greater Sudbury is a single-tier municipality, which means it is responsible for all municipal services and assumes all responsibilities set out under the Municipal Act and other provincial legislation. The City has 58 different service areas, each one important to various members of our community.

Resident Health and Safety

Your municipality is dedicated to keeping our residents safe and healthy through prevention, promotion and maintenance services. This group of services maintains community and individual safety through first response services, infrastructure maintenance and improvements, education programs and law and by-law enforcement.

- Animal control and shelter services
- Security and by-law enforcement
- Building inspections, permit approvals and plans examinations*
- Emergency management, public safety planning and prevention*
- Fire services, response
- Fire safety, education and prevention*
- Paramedic services, medical care and transportation*
- Community paramedicine
- Water collection, operations and maintenance
- Water* and wastewater treatment*
- Police services
- Transportation road safety and traffic control
- Drainage and flood management
- Public Health Sudbury and Districts
- Conservation Sudbury



**Resident
Health and
Safety**

* includes legislated services



Transportation

Transportation

With our large geographical area, the routes that connect us to our destinations are important. This group of services maintains and improves the transit systems and roads, bike lanes and walking paths that help us get around our community.

- Roads and bridges, operations and maintenance
- Sidewalks and bike lanes
- Parking
- Project planning, design and delivery
- Construction services
- Transit
- Winter road maintenance
- Greater Sudbury Airport



Quality of Life

Quality of Life

Your municipality is committed to maintaining and improving the quality of life of residents. These services give us opportunities to live, play, learn and come together.

- Service requests and inquiries (311)
- Communications and engagement
- Housing*
- Parks and playgrounds
- Recreation programs and facilities
- Community grants
- Museums and archives
- Libraries
- Cemeteries*
- Children services*
- Long-term care
- Shelters and homelessness
- Ontario Works*

* includes legislated services



Corporate Services

Corporate services are the backbone of our City's operations. These departments ensure that front-line services can be delivered efficiently and effectively, keeping our residents safe, healthy and connected.

- Information technology
- Legal services*
- Provincial Offences court*
- Clerk's Services and Council support*
- Taxation*
- Accounting and payroll
- Financial planning and budgeting
- Human resources and labour relations
- Compensation and benefits
- Real estate
- Facilities management
- Fleet



Corporate Services

Community Sustainability

A sustainable community has the right pieces in place to support and strengthen a bright future for the residents of our city. We continue to build a strong future for Greater Sudbury through improvements in policies and strategies.

- Economic development
- Community and strategic planning*
- Environmental planning and initiatives
- Development approvals*
- Solid waste collection and management*



Community Sustainability

* includes legislated services



Mission, Vision, Values

Our Mission:

At the City of Greater Sudbury, we work in partnership with our community to provide global leadership in technological, social and environmental development.

We build and foster a welcoming city that offers outstanding opportunity, wellness and value.

We recognize and appreciate our employees and ensure our staff receive the same level of respect and commitment they are expected to give to the community.

We are focused on fiscal, social and environmental responsibility for current and future generations. With trusted leadership and innovation, we provide resilient, dependable, accessible services and progressive policies that promote sustainable progress.

We work today to fulfill the needs of all those who work, live, visit, invest and play in our city.

Our Vision:

To be a Centre of excellence and opportunity – a vibrant community of communities living together.



Our Values:

We continuously find improvements to meet our communities' changing needs.

Innovation

We are fair and consistent. We deliver on our promises and acknowledge our mistakes.

Integrity

We show deep respect for everyone – employees, residents and visitors – and for the communities in which they live.

Respect

We act today in the interests of tomorrow.

Foresight

Actions speak louder than words. We do what is right, always.

Trust

We care about our residents, employees and businesses and how they relate to our services. We find the right solutions for their needs.

Compassion





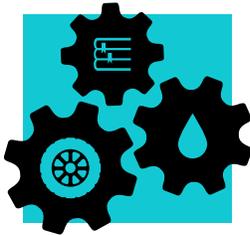
Look for these icons throughout the Budget to see how we are putting the Strategic Plan into action.

Strategic Plan

Council approved the 2019-2027 City of Greater Sudbury Strategic Plan to guide decisions about the city’s evolution over the next eight years.

Many stakeholder groups provided feedback into the Strategic Plan, including City Council, the Executive Leadership Team, staff and members of the community. Council attended a two-day workshop where they developed the foundation for the new Plan.

The Plan includes seven goals, each with specific initiatives that will be reflected in annual workplans.



1. Asset Management and Service Excellence

- 1.1 Optimize asset service life through the establishment of maintenance plans
- 1.2 Establish sustainable asset service levels to assess results from maintenance and renewal efforts
- 1.3 Maximize value of relationships with provincial and federal governments to support community infrastructure goals
- 1.4 Reinforce infrastructure for new development
- 1.5 Demonstrate innovation and cost-effective service delivery



2. Business Attraction, Development and Retention

- 2.1 Build economic development initiatives to support existing businesses, attract new businesses and promote entrepreneurship
- 2.2 Position Greater Sudbury as the global leader in mining and mining supply/service innovation
- 2.3 Strengthen business and development processes and services to support business growth
- 2.4 Revitalize our town centres, nodes and corridors with public investment that supports and leverages private investment



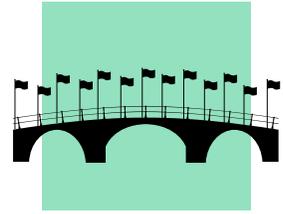
3. Climate Change

- 3.1 Support ecological sustainability
- 3.2 Develop and strengthen strategies and policies to mitigate impact of climate change
- 3.3 Build climate resiliency into existing programs



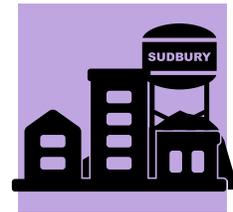
4. Economic Capacity and Investment Readiness

- 4.1 Review key core services and service levels
- 4.2 Leverage Greater Sudbury's public sector assets and intergovernmental partnerships to generate new economic activity
- 4.3 Build on opportunities resulting from our clustered network of health and education institutions
- 4.4 Invest in transformative facilities, spaces and infrastructure initiatives that support economic activity
- 4.5 Support the attraction, integration and retention of a highly skilled workforce
- 4.6 Develop strategies to support Indigenous economic development partnerships and opportunities
- 4.7 Launch new initiatives to attract and retain more newcomers for integration into new economic development partnerships and opportunities



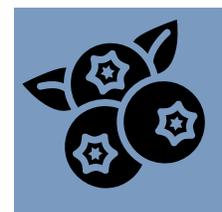
5. Housing

- 5.1 Expand affordable and attainable housing options
- 5.2 Revitalize and improve existing housing stock
- 5.3 Develop and promote solutions to support existing housing choices
- 5.4 Solidify the City's role in Greater Sudbury housing operations



6. Create a Healthier Community

- 6.1 Advance population health agenda
- 6.2 Invest in infrastructure to support community recreation with a focus on quality of life
- 6.3 Strengthen Indigenous relations toward reconciliation
- 6.4 Work with health stakeholders to determine appropriate role in local health team development
- 6.5 Build community pride through internal and external promotion of the city





7. Strengthen Community Vibrancy

- 7.1 Develop a public art implementation plan
- 7.2 Develop and implement policies, practices and enabling technologies that encourage meaningful citizen engagement at the neighbourhood and community level
- 7.3 Strengthen the framework of programs that support the artistic, cultural and creative expression of local residents and groups
- 7.4 Review the Official Plan and other corporate policies to ensure they are appropriately aligned with the strategic objective of community vibrancy
- 7.5 Where relevant, incorporate the objective of community vibrancy into the development of new municipal facilities and infrastructure.

Plans that Shape our Decisions

The **2019-2027 City of Greater Sudbury Strategic Plan** works in combination with other guiding documents to inform staff's recommendations and the decisions made by Council.

These documents provide direction based on in depth analysis and prior Council decision making. They ensure sustainability and improved processes as the City evolves and grows.

These documents include:

- The **Communications Strategic Plan** outlines a framework for the City's communications practices over three years, with a focus on connecting the community to the organization through community understanding, positive story sharing and empowered communications.
- The **Corporate Information Technology Strategic Plan** aims to create customer and staff interactions facilitated by simple, easy to use technologies that improve service quality and efficiency.
- The **Customer Service Strategy** is a framework for the City's customer service approach over the next three years, which aims to provide consistent, timely, and solution-oriented service for residents and employees.
- The **Downtown Master Plan** presents strategies for improving the downtown's level of economic, cultural and retail activity, its sense of place, and its role as the urban centre for the region.
- The **Economic Development Strategic Plan** outlines a number of goals including the development of an entrepreneurship ecosystem, a welcoming and open community, a highly skilled and creative workforce, one of Ontario's top tourism destinations, and more.
- The **Enterprise Asset Management Policy** outlines best practices for long-term financial planning and the process for making informed decisions regarding the acquisition, operation, maintenance, renewal, replacement and disposal of physical City assets.
- The **Official Plan** helps guide Greater Sudbury's development and land use by establishing long-term goals, policies and development



strategies for our city, including long-term goals relating to social, economic and environmental matters.

- The **Roads 10-Year Financial Plan** outlines a phased-in plan to increase capital funding to address growing infrastructure needs.
- **Subwatershed Study and Stormwater Master Plans** provide recommendations on how to protect people, property and the environment now and in the future with respect to storm water. The studies and plans address specific geographic areas surrounding local waterways including Junction Creek, Ramsey Lake, Whitson River and Whitewater Lake.
- The **Transportation Master Plan** falls under the scope of the Official Plan and focuses on a sustainable transportation network for vehicles, pedestrians and cyclists and their needs, through to 2031.
- The **Water/Wastewater Master Plan** outlines replacement and/or expansions required for the water and wastewater servicing networks in the community.
- The **Water/Wastewater 10-Year Financial Plan** outlines the current and anticipated operating and capital funding requirements for water and wastewater services.



A Healthy Community – Population Health

Supporting the health and well-being of all its residents, and strengthening community vibrancy is one of our strategic priorities. Many variables come into play to build a community that is inclusive, resilient and sustainable, but the basic foundation rests with the well-being of individuals. The priorities identified for population health are fundamental to achieve progress.

Council established a Population Health and Well-being panel to provide a channel for the corporation to work with community stakeholders on sharing information and developing initiatives that address important community health priorities. The ultimate goal of the Panel is to achieve sustainable communities where everyone is safe and has a sense of belonging, where all residents have access to the programs and services to meet their needs, and where strategies exist to make the city more compassionate.

Over a dozen community partners have gathered over the past year to move overall health, safety and well-being upstream, where efforts are proactive through public policy and prevention.

Through a combination of presentations by community partners and input from community members, the Panel produced the Population Health Call to Action 2018-2028, which identifies ten priorities for improving population health in Greater Sudbury:

- Flexible learning opportunities for Indigenous youth;
- Skill building to encourage resiliency;
- Support networks for children, youth and families;
- Sensitivity and inclusion to promote mental health;
- Compassion to create a welcoming and supportive environment;
- Accessible opportunities for all ages to play;
- Affordable and available housing;
- Holistic health to shift focus from treatment to prevention;
- Age-friendly strategies for a safe and accessible community;
- Active and sustainable outdoor urban spaces.

These priorities, endorsed by City Council and reflective of the Corporate Strategic Plan, are guiding the work of the PHSWB Panel into 2020. For this year, the Panel has chosen two top priorities on which to focus effort: Mental Health and Housing. Age Friendliness and a Compassionate City designation were also brought forward for further imminent development.

The work of the PHSWB Panel continues into 2020 with renewed provincial reinforcement, and nationally with the City joining the Canadian Municipal Network on Crime Prevention.



Engaging Our Community

An important aspect of the decision-making process is providing residents with an opportunity to offer feedback on projects that matter most in the community. Over the course of each year, we provide a variety of opportunities, both online and in person, for residents to participate in discussions before decisions are made. Connecting with residents and listening to feedback is important in building trust between residents and the municipality and ensuring success is achieved in managing the long-term needs of the community.

In addition to a complement of existing engagement opportunities, we use an online platform called Over to You, which offers new ways for residents to share their feedback via surveys, forums, idea boards, map applications and more.

The platform offers reporting mechanisms to easily gather the feedback received and report back to demonstrate the priorities established by the community.

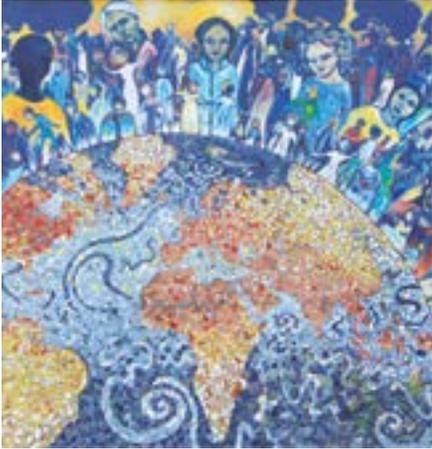
To date in 2019, the City has sought feedback on more than 30 projects and initiatives, including GOVA, the Parks, Open Space and Leisure Master Plan, Phase 2 of the Official Plan, the Valley East Twin Pad Multipurpose Sport Complex, Retail Cannabis Stores and more. Since launching the Over to You platform, more than 45,500 residents have learned about projects and over 9,000 people have offered feedback.

Community Action Networks

Sixteen Community Action Networks (CANs) help bring like minded residents together to work toward a healthy community. CAN members share a passion for community growth and improvement, and thrive on making a difference in their neighbourhoods. Meetings and events are open to anyone looking to contribute to helping Greater Sudbury be a great place to live, work and play, one CAN at a time.

A Commitment to Address Climate Change

This spring, City Council strengthened its commitment to addressing climate change by declaring a Climate Emergency. This commitment acknowledges opportunities for improving our community's health, air quality, community resiliency and economic development through addressing the risks of climate change. We have received international recognition for our greening efforts and municipal energy retrofits, and we are dedicated to continuing to protect our community, ecosystems and economy from climate change.



Diversity Policy

The City of Greater Sudbury has a Diversity Policy which emphasizes acceptance, inclusion and equality for all. The concept of a diversity policy was first advanced by the Diversity Advisory Panel and Chair Leonard Kim. The Diversity Advisory Panel worked over many months to develop the content, scope and audiences for the Diversity Policy and statement to ensure clear intentions and direct connection to human dignity, the Charter of Rights and Freedoms and the Ontario Human Rights Code. Following these efforts, the Diversity Advisory Panel presented the Diversity Policy and Statement to Council who adopted it unanimously in May 2014. The policy was then taken on by the Newcomer, Immigrant and Refugee Advisory Panel, which was established to provide advice to City Council on strengthening support in the community. This panel worked to develop the artwork and layout of the Policy to engage audiences and it is now displayed publicly in municipal facilities.

Large Projects

Large Projects continue to progress. Each project aligns with Council’s strategic objective to invest in transformative facilities, spaces and infrastructure initiatives that support economic activity.

Since the original proposals received from the community were shortlisted by City Council in 2016, the four selected Large Projects continue to advance:

- The Arena/Event Centre at the Kingsway Entertainment District
- Place des Arts
- The Library/Art Gallery (The Junction)
- Greater Sudbury Convention and Performance Centre (The Junction)

Work on the Large Projects has been ongoing, and each project is now in a different stage of exploration, analysis or development. Status updates are provided regularly to Council.

Arena/Event Centre at the Kingsway Entertainment District (KED)



The Arena/Event Centre will replace the existing 68-year-old Sudbury Community Arena as a location for sporting events and concerts. It will have a capacity of 5,800 for sporting events and 6,500 for concerts and will be an integral part of the Kingsway Entertainment District (KED).

The approved budget for the project is \$100 million. The new Arena/Event Centre is anticipated to generate \$142 million in direct and indirect spending and provide additional employment growth.

An integrated site design has been collaboratively developed by the partners involved in the development, which was extensively reviewed with the community. The design features innovative new public spaces and will become a destination for the northeastern Ontario region. Subject to the resolution of planning policy appeals, the project is ready to begin the practical work of site preparation and construction.



Pre-development engineering work is continuing to ensure that site preparation can be underway as soon as decisions are rendered on third-party zoning appeals. The Local Planning Appeal Tribunal has scheduled a four-day hearing to commence on May 5, 2020.

The design-build RFP for the Arena/Event Centre is being developed and will be finalized so that it is ready to issue around the same time as work begins on the site.

The Junction

The Library/Art Gallery

The main branch of the Greater Sudbury Public Library and the Art Gallery of Sudbury focus on community service, and have both long outgrown their current locations. This co-location was identified as a way to reduce capital and operating costs relative to separate facilities. In May 2019, Council voted for the Shaughnessy Street East parking lot, beside the Sudbury Theatre Centre, as the new preferred site for the Library Art Gallery.

The Library Art Gallery (LAG) will create a cultural hub in the city's historic downtown and contribute to an arts and culture district giving both organizations more space to serve the community as a resource for information, and catalyst for ideas and imagination. More space will also provide access to Greater Sudbury's important collection of archival materials and regional art. As the "living room" of the community, the new facility will foster a climate of lifelong learning, creativity, innovation and will contribute to economic revitalization.

The LAG has a conceptual design, functional program, business plan and an approved financing plan.

In an effort to provide maximum flexibility for this signature project, the City is actively engaged in efforts to secure adjoining properties, including the Sudbury Theatre Centre (STC) and the Sudbury Multicultural and Folk Arts Association (SMFAA). In addition, the opportunity for one level of parking under all or part of the new structure is under active consideration.





Greater Sudbury Convention and Performance Centre

The Greater Sudbury Convention and Performance Centre (GSCPC) will feature a community auditorium, a 950-seat main hall that will feature symphony concerts, public lectures and touring stage productions and, in less than 30-minutes, will convert to a flat-floor ballroom that can host 850 conference delegates. This innovative approach will address community needs that were first identified almost three decades ago, and will put Greater Sudbury firmly on the next level for public performances and convention business.

Preliminary capital costs for the project have been estimated at approximately \$63 million, with an additional \$2.5 million estimated for production and operational development. The GSCPC has a site, business plan, conceptual design and Council approved the financial plan in 2019. Private sector interest is also being solicited for the associated hotel development that has been identified as important to the success of the business plan.



Place des Arts

Place des Arts will be the first multidisciplinary arts centre in northeastern Ontario. The multipurpose cultural centre is a contemporary arts and culture facility for Francophones and for the entire community. Located at the corner of Elgin and Larch, north of Medina Lane in downtown Sudbury, the centre will offer nearly 850 activities per year, aiming to have 50,000 admissions annually. Place des Arts will include a performance hall, a multipurpose studio, a contemporary art gallery, a youth studio, a bistro with seasonal sidewalk terrace, a gift and bookshop, an early childhood artistic centre with a playground, and office space.

Place des Arts has leveraged City Council's commitment of \$5 million and the downtown property into a community centre cultural project with a construction budget of \$30 million. The project has secured several large private sector donations and continues to approach its community fundraising goal. The estimated economic effects of the project construction are \$18.7 million and the creation of 180 jobs. Site preparation is complete, a detailed design was unveiled and construction began in August 2019. The project is expected to be complete in 2020.



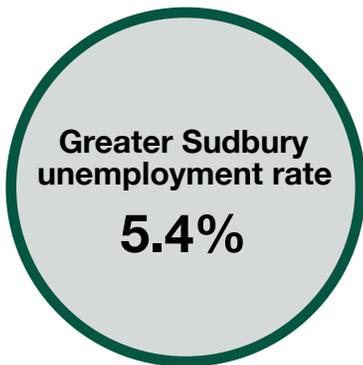
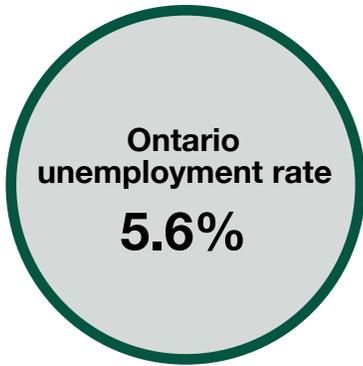
Our Economy

With our all-season, outdoor playground and positive work-life balance culture, Greater Sudbury is a wonderful place to live, work and play. Central to the economic growth of northeastern Ontario, our medical, retail, business, financial and research services are critical to residents across the northeastern part of the province. The Conference Board of Canada predicts Canada's Gross Domestic Product (GDP) will grow by 1.4 per cent in 2019 and 2 per cent in 2020. Greater Sudbury is expected to grow by 1.3 per cent in 2019 and 1 per cent in 2020.

Economic Outlook

Economic Indicators	2016	2017	2018	2019f	2020f	2021f	2022f	2023f
Real GDP at basic prices (2012 \$ millions)	8,393	8,511	8,722	8,833	8,923	8,991	9,070	9,134
Percentage change	0.1	1.4	2.5	1.3	1.0	0.8	0.9	0.7
Total employment (000s)	82	81	81	85	83	83	83	84
Percentage change	-0.8	-0.7	0.4	4.5	-2.2	0	0.2	0.2
Unemployment rate (per cent)	8.1	6.7	6.5	4.2	6.2	6.0	6.0	6.0
Household income per capita (\$)	46,718	48,149	49,386	49,294	51,321	52,702	54,357	56,016
Percentage change	1.2	3.1	2.6	-0.2	4.1	2.7	3.1	3.1
Population (000s)	169	170	171	173	173	173	173	173
Percentage change	0.3	0.3	1.1	0.7	0.1	0.1	0.1	0.1
Total housing starts	289	195	189	196	262	262	260	254
Retail sales (\$ millions)	2,115	2,250	2,334	2,366	2,432	2,497	2,568	2,636
Percentage change	6.1	6.3	3.7	1.4	2.8	2.7	2.8	2.6
CPI (2002 = 1.000)	1.297	1.319	1.35	1.376	1.406	1.436	1.466	1.495
Percentage change	1.8	1.7	2.4	2.0	2.2	2.1	2.1	2.0

Source: Metropolitan Outlook 2, Summer 2019, Conference Board of Canada
f = forecast



Source: Statistics Canada, Labour Force Survey, August 2019.

Employment

In August 2019, 84,600 people were employed in Greater Sudbury, which is 3,800 more people employed than in August 2018. The city reached its highest employment rate in April 2019, with 87,300 people working.

In May 2019, Greater Sudbury ranked number four in employment growth on the national scale, exceeding the provincial and national results.

Unemployment

Greater Sudbury's unemployment rate in August 2019 was 5.4 per cent, down from 6.7 per cent in August 2018. In July 2019, Greater Sudbury had one of the lowest unemployment rates it has seen in recent history at 5 per cent. Ontario's unemployment rate in August 2019 was 5.6 per cent, while Canada's was also 5.6 per cent.

Community Planning

2019 has been busy for community planning, including:

- \$87,231,844 Capital contracts tendered by Engineering Services
- 7,637 building inspections
- 2 official plan amendments
- 20 applications for rezoning
- 12 site plan applications
- 75 applications for minor changes to the Zoning By-law
- 66 lot split/easement applications

Employment Land Management Strategy

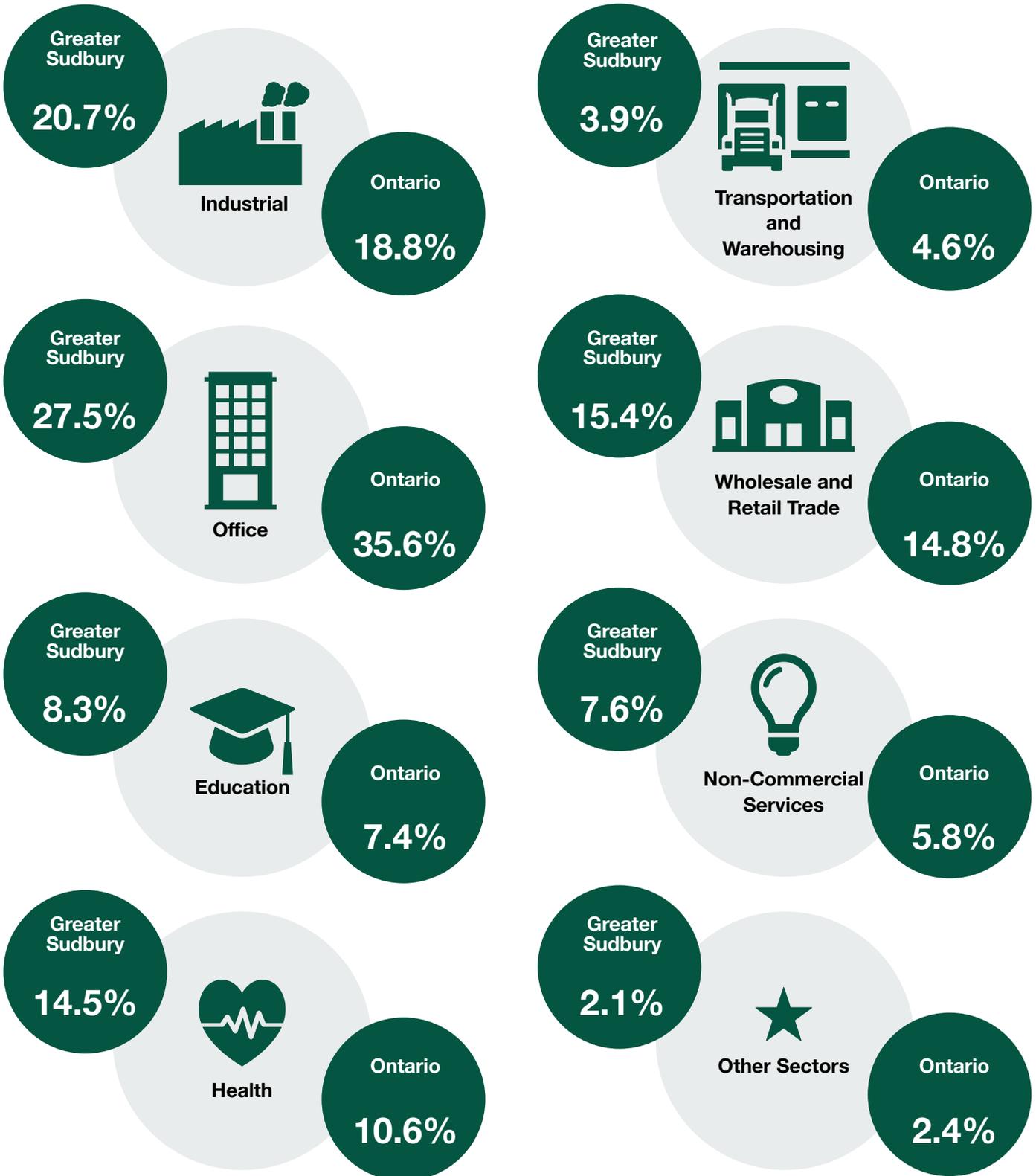
The Employment Land Management Strategy will help ensure the City of Greater Sudbury is well positioned to respond to emerging economic opportunities, and can continue to support a diversified economy now and into the future. The strategy will consider future economic and labour force trends, demand for employment, employment land supply, feasibility of development and incentives to meet anticipated demand.

This strategy will provide an opportunity to examine opportunities and issues in more detail and ensure that its land use and fiscal policies, infrastructure, and services are aligned and consistent with best practices. It also provides the opportunity to explore the role of municipal industrial parks within a modern economy.

The results of the strategy will also guide the development of financial incentive programs and policies that will assist with the marketing and promotion of employment lands to better position us to attract new investment and capitalize on local business expansion opportunities.



Employment by sector



Source: 2016 Census of Canada, Statistics Canada



Community Trends

In order to make informed decisions, Greater Sudbury draws on the best research available to understand the trends that are driving the Canadian economy and society, and how those trends are likely to affect us. The Conference Board of Canada, Canada's foremost independent, evidence-based applied research organization, produces regular reports on Greater Sudbury's outlook, as well as comparative studies with similar-sized cities.

Below are two key trends that will affect Greater Sudbury's economic outlook over the short-term future.

Nickel Demand

As one of the top nickel producers in the world, Greater Sudbury will no doubt benefit from the anticipated surge in demand for the metal as the global transition to electric vehicles begins to accelerate. Many of the key ingredients for electric vehicles such as nickel, copper, lithium and cobalt, are either produced in Greater Sudbury or in neighbouring communities.

The nickel industry is an important player in Greater Sudbury's primary and utilities sector. Despite a pullback during the last quarter of 2018, nickel prices still rose 26 per cent for the year overall. The World Bank expects lower nickel inventories to push prices up this year, a trend that materialized during the first quarter, with nickel prices increasing by 8.3 per cent. However, the Bank anticipates that prices will not be able to fully recover from the sharp pullback that occurred at the end of last year, leaving them 1.8 per cent lower for the year overall. The long-term outlook is more positive, with the increasing use of nickel in the batteries of electric vehicles expected to boost prices.

Population

Greater Sudbury is expected to grow over the next 30 years by between 6,900 to 15,000 people, 6,000 to 8,400 households and 6,400 to 11,000 jobs under modest and high growth scenarios. Currently, the average age of a resident in Greater Sudbury is 42.2 years old. As our population ages, there will be a shift in services, increasing the demand on Paramedic Services, Housing and Long-Term Care (Pioneer Manor) which will prompt changes in other service areas.

Population growth in Greater Sudbury is expected to come in at 0.7 per cent this year and at 0.1 per cent in 2020, following a 1.1 per cent gain in 2018.

Organizational Trends

Customer Service Strategy

The City of Greater Sudbury puts the needs of residents at the forefront of the service delivery efforts. The Customer Service Strategy creates consistent, timely customer service.

In 2019, we extended 311 operating hours, introduced a customer feedback program and adopted a set of response standards.

These service enhancements help establish a positive customer service culture with clear expectations and measured results.

311 Extended Operating Hours

- In order to provide improved access to municipal information, the 311 call centre has extended its operating hours. New hours are Monday to Friday from 7:30 a.m. to 6 p.m. After-hours service is still available for public works emergencies and animal control issues.



Customer Feedback Program

- Residents now have a simple, quick avenue to provide feedback on their customer service experiences. Customer feedback forms are available at libraries and citizen service centres, arenas, and at service counters throughout Tom Davies Square. Gathering this important feedback allows ongoing opportunity to continuously improve customer service to the community.

Customer Service Standards

The City adopted a set of standards designed to provide consistent and reliable responses to inquiries. These standards lay out timeframes and best practices about when and how staff respond to resident requests. Telephone and email requests for information receive a reply within two business days, and correspondence by mail receives a response within 10 business days. These standards apply to all municipal services under regular operating conditions. Visit greatersudbury.ca/customerservice to find out more.

Technology Advances

- The City of Greater Sudbury's Customer Relationship Management (CRM) project will achieve a modernized system for the organization, provide customer service delivery improvements, and transform the way we do business and provide services to residents
- The Land Information Management System (LIMS) project will enable efficient development, licensing and permitting processes, and support web based access for citizens and customers
- The Recreation and Facility Booking system project will replace an older no longer supported system and transition to modernize and simplify the citizen experience
- The Advanced Metering Infrastructure (AMI) and Automatic Meter Reading (AMR) project will improve water meter accuracy, enhance efficiencies related to the process of reading water meters and enhance service to customers across the water system
- Ongoing improvements to Geographical Information System (GIS) includes adding layers of information and access to open data used extensively and is available to citizens on greatersudbury.ca/play/maps
- Ongoing development of CityWorks, a municipal maintenance management system that integrates with GIS to enable staff to better manage and record work on infrastructure assets
- Ongoing development of Enterprise Resource Planning (ERP)/PeopleSoft to efficiently plan, track and process financial and human resources transactions
- Implementation of Pay-by-Plate technology, offering residents an accessible digitized process and cash free option to pay for on street and municipal lot parking

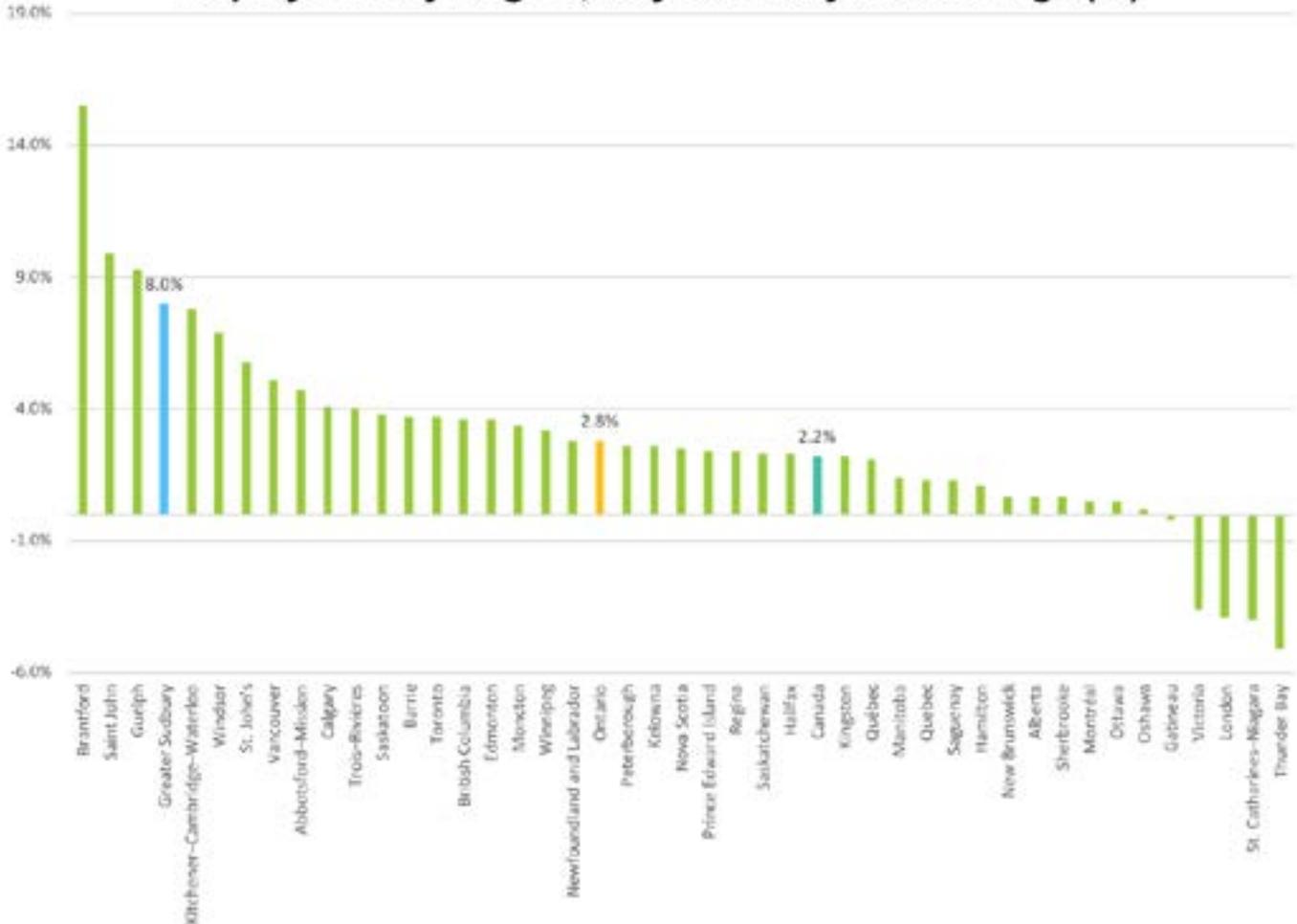


Economic Strategic Context for 2020

The Conference Board of Canada predicts Canada’s Gross Domestic Product (GDP) will grow by 1.4 per cent in 2019 and 2 per cent in 2020. Despite the soft economic growth, a solid 327,000 jobs are expected to be generated this year, although employment creation is projected to moderate to 185,000 next year.

Greater Sudbury’s economy grew 2.5 per cent in 2018. Economic activity is expected to be moderate over the coming months, with real GDP expanding by 1.3 per cent in 2019 and 1 per cent in 2020. Greater’s Sudbury labour market has struggled over the past few years. However, employment rates began to rise and are projected to increase by 4.5 per cent, translating into the generation of close to 3,690 net new jobs.

Employment by Region, May 2018/May 2019 change (%)



Source: Conference Board of Canada, Metropolitan Outlook, Greater Sudbury, September 2019



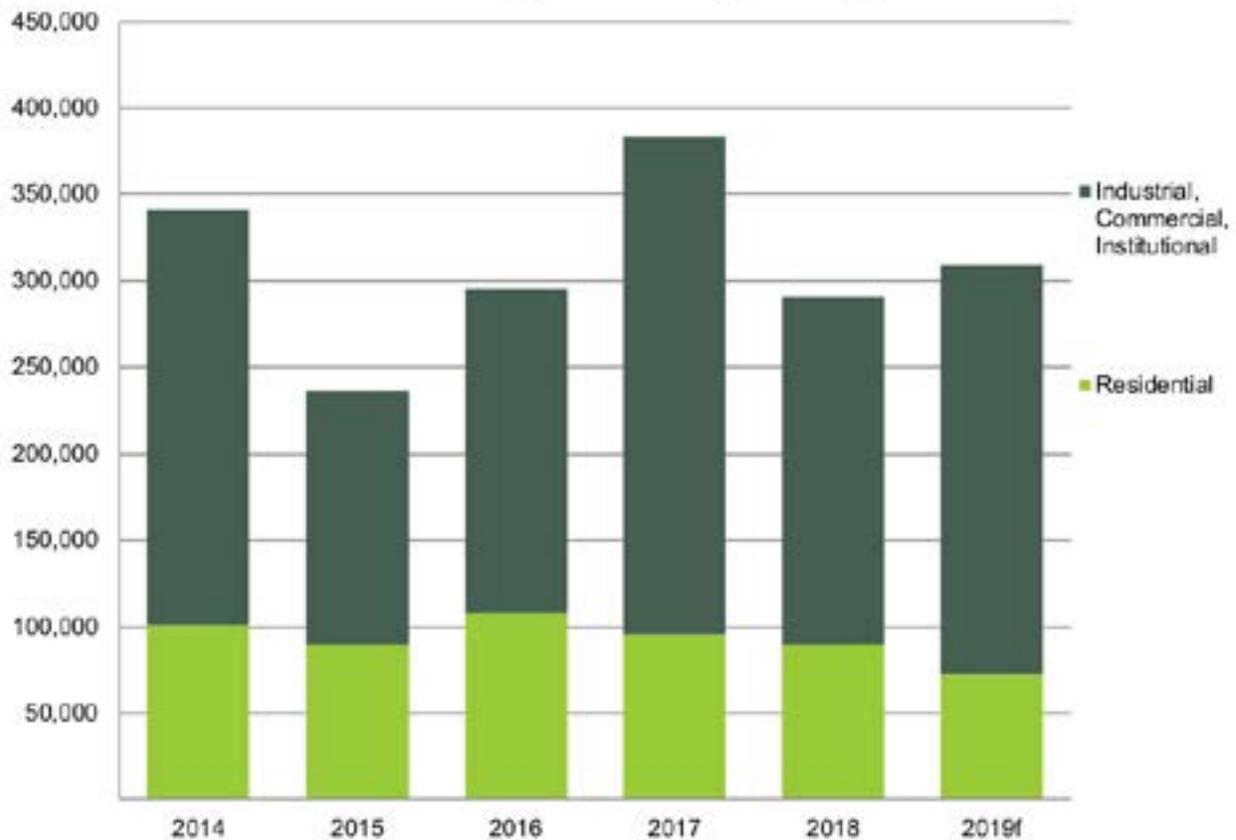
Housing and Building Permits

As of end of September 2019, 1,626 building permits have been issued, an increase of 13.2 per cent from 2018. The total construction value of building permits issued to date exceeds \$231.8 million, an increase of 14.6 per cent compared to \$202.3 million in 2018.

Building Permit Value of Construction by Sector:

- The Industrial, Commercial and Institutional (ICI) sector accounted for 71.8 per cent of the issued permit construction value totaling \$166.4 million, an increase of 19.8 per cent from 2018
- New Residential Construction (including seasonal dwellings) accounted for 14.3 per cent of the issued permit construction value totaling \$33.1 million, a decrease of 10.8 per cent from 2018
- Residential Additions, Alterations, and Renovations accounted for 10.2 per cent of the issued permit construction value totaling \$23.7 million, an increase of 25.4 per cent from 2018
- Residential accessory buildings and structures, accounted for 3.7 per cent of the issued permit construction value totaling \$8.6 million, an increase of 16.2 per cent from 2018

Building Permits (\$000's)





Jobs and Job Growth

According to the Conference Board of Canada, the top sectors for employment in Greater Sudbury in 2019 included:

- Health Care and Social Assistance
- Wholesale and Retail Trade
- Primary and Utilities
- Construction
- Educational Services

Municipal Accommodation Tax

The Municipal Accommodation Tax (MAT) was implemented in September 2018. The 4 per cent fee is applied to accommodations of less than 30 consecutive days such as hotels, motels, AirBnBs and other lodging options.

Since inception, \$2.2 million was collected. Half of the revenue is retained by the City to support programs and services, at the direction of City Council. The remaining half is used to promote and grow tourism through the Greater Sudbury Development Corporation.

Film and Television

Film and TV production continues to grow in Greater Sudbury. As of August 2019, there were 10 productions filmed and a total of 848 days of filming. Filming in our community has resulted in over \$18.7 million spent in our local economy from January to August, 2019.

Rural and Northern Immigration Pilot Program

Greater Sudbury has been selected as one of 11 northern communities to participate in the federal government's new Rural and Northern Immigration Pilot Program (RNIP). The program is designed to spread the benefits of economic immigration to smaller communities by creating a path to permanent residence for skilled foreign workers who want to work and live in Greater Sudbury. The City of Greater Sudbury will begin taking applications in late 2019. The program will run for three years with the possibility of an extension to five years.