

## Overview of Steps in an Amalgamation Study

This document is an overview of the key activities in an amalgamation study. It is for illustrative purposes and may not account for all the steps in an amalgamation project. This page is meant to illustrate the connections between the activities undertaken by local governments and the Ministry. Timelines for the project will vary depending on design and scope of each component of the project, but such a project typically takes several years. The following page contains more details on the steps outlined below.

### Saanich and Victoria (Municipalities)

**Councils** come to agreement on the framework for the project

**Staff jointly** draft terms of reference (TOR) and submit for **Councils'** consideration

**Councils** agree on TOR for project

**Councils** submit **request for funding to Minister**

**Municipalities** undertake request for proposals (RFP) for Consultant(s)

**Municipalities** select members of Citizens' Assembly

**Municipalities** launch, and they/their consultants undertake component projects – e.g.

- a) Citizens' Assembly
- b) Technical report on impacts of structural, administrative, and service changes
- c) Other reports/engagement with key interests (as desired)
- d) Transition plan

**Municipalities** share findings and they/their consultants undertake public consultation with their residents

**Councils** decide on whether to request that the **Minister consider ordering** votes on amalgamation

**Municipalities** hold assent votes

**Municipalities** start implementation of their transition plan in advance of incorporation of new municipality

**A Municipality** runs Election of First Council  
Incorporation of the new municipality

### Ministry of Municipal Affairs and Housing (MAH)

*Optional: Share TORs for review by Ministry staff prior to council considering them*

**Minister** considers request for funding  
If yes, **MAH** creates contribution agreement

**MAH** notify area First Nations (can be done with municipalities)

**MAH** coordinates requests for information from consultants regarding Provincial programs as required

**MAH** coordinates the Provincial Commitment of Restructuring Assistance (assistance if votes are in favour)

If **Minister** supports ordering the votes, then Ministerial Orders for each municipality are issued

If the outcomes of the votes are yes, **MAH starts** drafting of legislative instruments

**Minister** puts forward Letters Patent for **Government** consideration. If Letters Patent are issued, then **Municipal** transition plan kicks in

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| <b>Examples of considerations for a Project Framework</b><br>Typically, a framework will contain high-level information on the purpose, principles of engagement, timelines, governance, roles and methodologies; this may be used by councils to guide their work.   | <b>Leads: Municipalities</b>  |
| <b>Examples of content for Terms of Reference (TOR)</b><br>Name of project(s), Proponents<br>Roles and responsibilities for various participants, including elected officials<br>How decisions are made (e.g., project governance)<br>Budget – including who is going to administer the study grant and which municipality will run the RFP<br>How the work is going to be done (methodology etc.)? | <b>Leads: Municipalities</b> , with MAH input (if desired)<br>Goals for each component of the project(s)<br><br>Steps in each component of the project(s)<br>What is in scope and what is out of scope?<br>Work breakdown including sequencing and scheduling of events<br>What are the deliverables for each phase of the project? |
| <b>Councils submit request for funding to Minister</b><br>Reasons for/details on the project (e.g., project framework, budget and any other pertinent information)<br>Overview of work done to date   | <b>Leads: Municipalities</b><br><br>TOR   |
| <b>MAH Provincial Funding Review</b><br>Is there adequate engagement of the public?<br>Is there an adequate resource plan?<br>If the study grant is approved by the <b>Minister</b> , <b>MAH staff</b> will draft a contribution agreement  | <b>Lead: MAH</b><br>Request additional documents as required<br>Is there room in the program budget and does it meet the requirements of the regulation?  |
| <b>Selection of consultants</b><br>As per municipal procurement procedure   | <b>Leads: Municipalities</b>  |
| <i>Municipalities may opt to run the following three "projects" plus any additional reports or engagement concurrently or separately</i>  |   |
| <b>Citizens' Assembly</b><br>Creation of per agreed steps outlined in the TOR<br>Assignment of municipal representatives  | <b>Leads: Municipalities</b><br>Clear methodology for the selection of participants<br>Clear scope of duties and purpose  |
| <b>Examples of content for Technical Study</b><br>Creation of agreed steps outlined in the TOR<br>Analysis of anticipated impacts on services, governance and assumptions about service delivery including arrangements   | <b>Leads: Municipalities</b><br>Comparison of the two organizations<br>Analysis of anticipated impacts on other local governments (e.g., CRD)   |
| <b>Examples of content for Transitional Plan</b><br>Name of Chief Election Officer for election of first council<br>How will the name of the new municipality be selected?<br>Name of interim corporate officer for the new municipality  | <b>Leads: Municipalities</b><br>Procedures for holding joint council meetings (i.e., from issuance of Letters Patent to incorporation of a new municipality)<br>Principles of HR management<br>Provisions for the continuation of services and governance for residents   |

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| <b>Provincial Commitment of Restructuring Assistance</b>  | <b>Lead: MAH</b>   |
| After a draft of technical report is provided to MAH, the Province will consider scope of Assistance (i.e., both financial and non-financial) and send it to councils   |  |
| <b>Public Engagement</b>  | <b>Leads: Municipalities</b>   |
| Municipalities share results from reports as per the TOR and the provincial commitment of restructuring assistance  |  |
| <b>Request for votes on amalgamation</b>  | <b>Leads: Municipalities</b>   |
| <b>Councils</b> submit a joint request for votes on amalgamation to the Minister, providing evidence that supports their request (e.g., outcomes from public engagement, Citizens' Assembly, technical report and transition plan)    |  |
| <b>Legislative Instruments</b>  | <b>Lead: MAH, with Local Government staff participation (both municipalities and the CRD)</b>                              |
| Review of existing regulations, legislation and Letters Patent  | Drafting of Letters Patent for the new municipality, amending letters patent (CRD), regulation and legislation as required |
| Discussing provisions for the Letters Patent, including creation of local area services - municipal staff to identify service names, geography and the related bylaws to be referenced in the Letters Patent for the new municipality |  |