



Planning Halifax's economic future.



Report on **ECONOMIC STRATEGY SCORECARD 2007**







Halifax Economic Strategy Scorecard Table of Contents

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Welcome to the Halifax Chamber of Commerce's first annual Economic Strategy Scorecard event.

We are revisiting the goals of Halifax's economic strategy, published in *Strategies for Success* in November 2005. These goals were based on recommendations from the Economic Summit the Chamber hosted in 2004, for a long-term, comprehensive economic strategy to guide the city's growth.

After our Economic Summit, city council created an advisory committee that produced *Strategies for Success*. City council adopted the document on October 18, 2005.

What we're doing now is reviewing the progress on the goals of the strategy.

While the Halifax Regional Municipality owns the strategy, many organizations and all three levels of government are involved in its implementation. I believe the Chamber plays an important role in the ongoing process and, in February 2006, we outlined that role for the city and the Greater Halifax Partnership.

The Chamber will provide an independent and objective evaluation of the work being done to reach the goals of the economic strategy. We have committed to an annual public event to help keep the strategy top of mind. We have also designed a scorecard to measure how we are progressing. It's our hope that the event and the scorecard will build in some accountability so the strategy, and the good work that led up to it, will not be lost.

We want to shine a light on the strategy so we can, as a community, move forward with implementation and receive full benefits of well-planned growth for Halifax.

Thank you for joining us for this review. I believe together we can build on existing momentum that will lead to the success of the strategy and, ultimately, our city.

Sincerely,

Valerie Payn President, Halifax Chamber of Commerce



Economic Strategy Important Dates

JUNE 2004: Halifax's municipal government asks the Halifax Chamber of Commerce to host an economic summit

SEPTEMBER-OCTOBER 2004: Volunteers meet in preparation for the Economic Summit

NOVEMBER 2004:

- Economic Summit
- Chamber presents Economic Summit findings to city council

MARCH 2005:

- Chamber sends municipal staff the Economic Summit report
- Municipal staff starts to bring an advisory committee together to work on the economic strategy

OCTOBER 2005: City council approves the economic strategy policy Strategies for Success

NOVEMBER 2005: Strategies for Success is released

NOVEMBER 2006: Chamber starts work on Economic Strategy Scorecard

FEBRUARY 2007: Chamber hosts the first annual Economic Strategy Scorecard event



Economic Strategy Scorecard Analysis

INTRODUCTION

November of 2006 marked the first anniversary of the publication of *Strategies for Success*, Halifax's first economic strategy. In keeping with the spirit of the work that went into producing this document, the Halifax Chamber of Commerce decided to annually review the strategy implementation.

The Chamber will host a public event to maintain momentum, provide accountability and measure the outcomes of the strategy. As an external observer, the Chamber is well placed to provide such a report. Though we have had research support from the municipality and the Greater Halifax Partnership the scorecard results are our own, and we accept responsibility if there are any errors.

In *Strategies for Success*, there are 94 activities (e.g. Develop Business Case for DND and Federal Government Offices), of which 11 have been identified as high priority. There are also 30 outcome measures (e.g. Enhance access to broadband) and targets (e.g. Reach 100 per cent broadband access within five years) to help track the progress of the activities.

As a result, the Chamber designed a scorecard to track the economic strategy annually through to 2010, the date outlined in the strategy's five-year plan. It is meant to monitor the 30 outcome measures, evaluate individual targets and determine how each one is progressing.

The data used to evaluate the targets were determined to be sufficient if: a) It was from a reliable source, e.g. Statistics Canada, Province of Nova Scotia, Conference Board of Canada etc. b) It is specific to Halifax; only in a few instances was provincial data used, c) It was collected on a regular basis, preferably annually, and d) It was easily accessible.

RESULTS

The first year of the strategy has been slow. Only 11 of the 30 measures are on target to meet the five-year goal. Another two have shown progress close to, but below, the planned rate. Thirteen measures are seriously off-target with several deteriorating rather than improving. Finally, for four of the measures we were unable to find a valid measurement.

To show the progress on the measures the Chamber's scorecard has six possible marks: two green lights, one green light, one yellow light, one red light, two red lights or no score.





Economic Strategy Scorecard Analysis



Two green lights indicate the measure is tracking above target.

There are five measures that have met or are exceeding the target set for the measure:

- 1. Foster Greater Awareness of Halifax as a place to do business: Growth in GHP website hits exceeds goal by 49%.
- 2. Business Confidence: Business confidence continues to be the best in Atlantic Canada.
- **3.** Implement Gateway Strategy: A very comprehensive gateway strategy is up and running within the first year.
- 4. Benchmark Business Climate: This target has been completed and a comprehensive business climate benchmarking capability has been established.
- Grow Commercial Tax Base: The base has grown 12% since 2004 and is exceeding the targeted outcome.

ONE GREEN LIGHT

One green light indicates the measure is on target. There are six measures on target:

- Improve Employment Growth: Employment is tracking satisfactorily toward the goal of 215,000 in 2010.
- 2. Decrease Unemployment Rate: There is a .6% reduction, and so far the measure is progressing ahead of schedule.
- 3. Improve Average Income: Halifax is slightly below the Canadian average, but moving well toward target.
- 4. Increase Support for Economic Development: Spending has grown by 5%.
- 5. Enhance Access to Broadband: Halifax has 75% coverage, and moving well toward target of 100%.
- Reduce Crime Rate: Halifax's crime rate has gone down, as have the rates for similar Canadian cities.

ONE YELLOW LIGHT

One yellow light indicates the measure is tracking close to but below target There are two measures that received a yellow light:

- 1. Attract More Immigrants: The number of immigrants has increased slightly but not enough to track toward the goal of 2,800 in 2010.
- 2. Improve DND and Federal Employment: DND employment has grown, but slowly.

ONE RED LIGHT

One red light signifies the measure is off target. Five measures are off target:

- 1. Enhance Quality Labour Force: The number of persons with a post-secondary education remained level, rather than growing from the present 52% toward the goal of 70%.
- 2. Attain High Community Satisfaction: Has remained flat at 62% rather than growing toward the goal of 80%.
- 3. Joint Economic Development Initiatives Implemented: Only six of the 11 high priority actions are showing satisfactory progress.
- Set Competitive Commercial Taxes: Halifax's commercial taxes are not competitive, to other cities across Canada.
- 5. Increase Private Investment: Halifax's private investment has improved but continues to remain below the national average.

TWO RED LIGHTS

Two red lights indicate the measure is off target, deteriorating or is not being addressed. There are eight measures that have garnered this designation:



- 1. Increase Population Growth: The goal is to be among the top 10 metropolitan areas in Canada, but we have slipped slightly to 21st.
- 2. Enhance Participation Rate in the Labour Force: Halifax's participation rate has dropped sharply.
- 3. Increase University Admissions: Halifax's universities are very important both as providers of a skilled workforce and as economic engines in their own right. Instead of the planned growth in admissions we have had a reduction of 500 in the first year of the plan.
- 4. Increase Public Investment (in the Our Creative Community section): Halifax's per person public investment in infrastructure to support our creative communities has decreased and continues to be well below comparator cities.
- **5.** Increase Visitors to Heritage Sites: A useful barometer for tourism and related facilities. The number of visits has decreased.
- Increase Room Nights Sold: Another good measure for tourism. After a flat year in 2005 visits dropped 7.5% in 2006.
- Enhance Brand Recognition: No action has been taken to set up a Quality of Place Council, which was to lead this effort.
- 8. Increase Public Investment (in the Our Business Climate section): Halifax's per person public investment is considerably below the average of benchmark cities.

NO SCORE

No score signifies that a viable information source cannot be located at this time to evaluate the measure's target.



There are four outcomes that have not been assigned a score:

- Retain More Immigrants: The present formula relies on infrequent Census data. Have been unable to locate an alternate information source for this item.
- Improve Decision Times for Construction Projects: We have not seen evidence that appropriate measures have been developed for Halifax, or researched for other jurisdictions.
- 3. Increase Research and Incubation Space: It is not clear how this would be measured.
- **4. Grow Employment in Capital District:** Employment data on that geographical split (Capital District vs. Halifax Regional Municipality) does not exist.



People People

MEASURE

Increase Population Growth

TARGET

Rank among the top 10 Census Metropolitan Areas with the fastest population growth over the next five years

SCORE





MEASURE

Improve Employment Growth

TARGET

Increase employment growth by more than 10 percent over the next five years

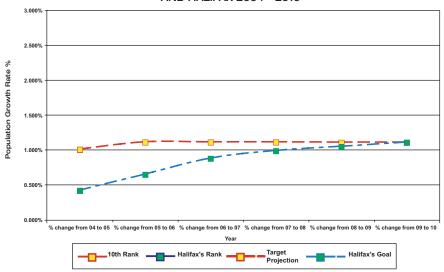
SCORE



Halifax Economic Strategy Scorecard Measures & Targets

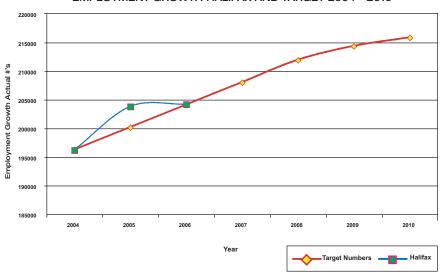
Halifax's population growth did not increase enough to rank among the top 10 CMAs. In 2004/2005, Halifax's population growth was 0.42% and ranked 21st. However, in 2003/04, Halifax was ranked 19th and, in 2002/03, Halifax was ranked 13th. In 2004/05 Abbotsford, BC, was ranked first with a population growth of 2.50%, followed by Oshawa, ON, at 2.42% and Calgary, AB, in third at 2.08%. The 10th ranked CMA, St. John's, NL, had grown by 1.01%. The average population growth of the top 10 CMAs was 1.70%.

POPULATION GROWTH COMPARISON TOP 10 RANKED CMA RATES AND HALIFAX 2004 - 2010

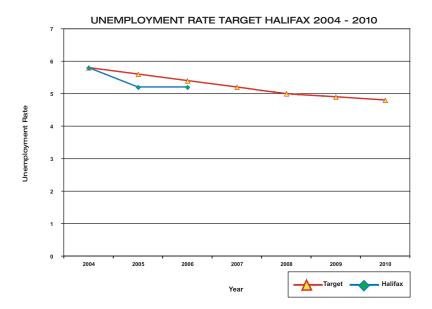


Employment growth in Halifax increased by 4.8% between 2004 and 2006. At this rate, Halifax is ahead of target and expected to reach the overall target of 10% over the next five years.

EMPLOYMENT GROWTH HALIFAX AND TARGET 2004 - 2010



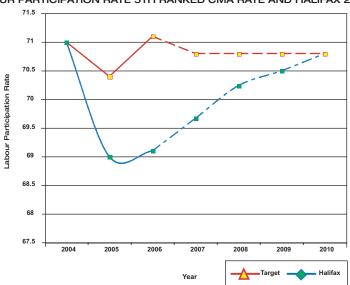
The unemployment rate in Halifax has declined. In 2005 there was a decrease of 0.6% from 5.8% to 5.2%. In 2006 the unemployment rate remained steady at 5.2%. Despite little movement over the last year, Halifax's unemployment rate remains on target to achieve its goal of a 1% reduction to 4.8% by 2010.



Halifax's labour participation rate has fallen. In 2004, Halifax's labour participation rate was on target at 71% and ranked 5th. However, in 2005, Halifax slipped to 12th place with a rate of 69%. The rate had a very slight increase to 69.1% in 2006 but the rank remained the same.

In 2006, Ottawa-Gatineau was ranked 5th with a rate of 71.1%. The top five ranked CMAs maintained an average rate of 72.76%. They were led by Calgary, AB, at 76.9%, followed by Regina, SK, at 73.1% and Kitchener, ON, at 71.5%.

LABOUR PARTICIPATION RATE 5TH RANKED CMA RATE AND HALIFAX 2004 - 2010





MEASURE

Decrease Unemployment Rate

TARGET

Reduce the overall unemployment rate by 1 percent over the next five years

SCORE



MEASURE

Enhance Participation Rate

TARGET

Rank among the top five Census **Metropolitan Areas with** the highest labour force participation rate







M E A S U R E
Attract More Immigrants

TARGET
Attain 2,800 Immigrants
a year by 2009

SCORE





M E A S U R E Retain More Immigrants

TARGET
Retain 70% of new immigrants by 2009.

NO SCORE





MEASURE

Increase University Admissions

TARGET

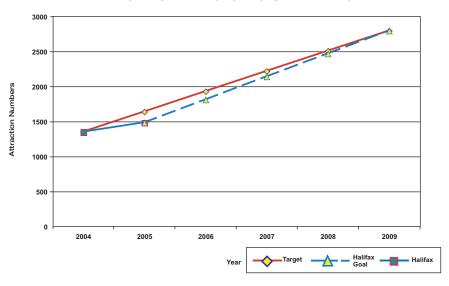
Increase admissions by 500 a year in Halifax for the next five years

SCORE



Immigrant attainment in Halifax is below target. Halifax attracted 1,355 immigrants in 2004 and 1,488 in 2005, below the annual target of 2,800.

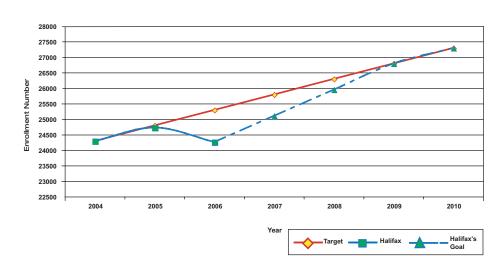
IMMIGRATION ATTRACTION ACTUAL AND TARGET



Research has not produced a viable source to determine this measure.

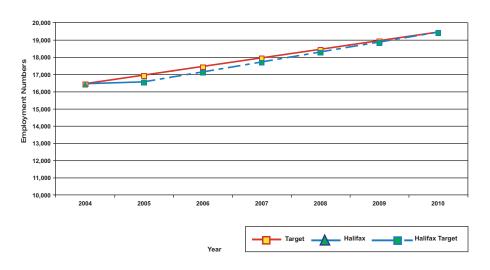
Halifax's university admissions are failing to make their marks. With the economic impact universities have on Halifax this is a problem that needs to a priority in future planning. Halifax's fulltime university admissions rose appropriately between 2004 and 2005 acquiring 435 admissions to bring the number just slightly off target. Then in 2006 instead of increasing the targeted 500 the admissions jumped off by 467 falling off target by 1032.

FULLTIME UNIVERSITY ENROLLMENT IN HALIFAX WITH TARGET 2004 - 2010



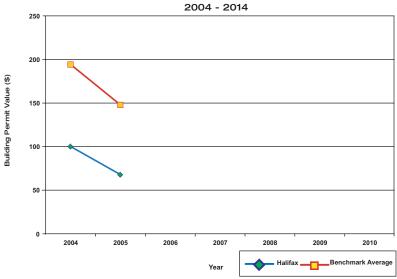
Federal/DND employment is close to, but below target. In 2005, DND and federal employment saw a growth of 107 jobs from 16,437 to 16,544. However, it was approximately 200 fewer jobs than the projected target for Halifax for 2005.

DND & FEDERAL EMPLOYMENT NUMBERS HALIFAX AND TARGET 2004 - 2014



Halifax's per person public investment is considerably below the average of benchmark cities. In 2005, the average investment of benchmark cities was \$148.36. Halifax was \$68.17, or 46% less. The benchmark cities that Halifax was compared to were: Victoria, BC, London, ON, Regina, SK, St. John's, NF, and Quebec, QC.

PUBLIC INVESTMENT: COMPARISON HALIFAX AND AVERAGE BENCHMARK CITIES 2004 - 2014





MEASURE

Improve DND and Federal Employment

TARGET

Increase defence and federal employment presence by 3,000 persons by 2010, recover half of the job losses since the 1990s

SCORE





MEASURE

Increase Public Investment

TARGET

Increase per person public investment to be on par with benchmark cities





MEASURE

Enhance Quality Labour Force

TARGET

Have the number of people employed with post-secondary degree or diploma at 70% within five years

SCORE





MEASURE

Increase Support for Economic Development

TARGET

Increase economic development funding over the next five years

SCORE

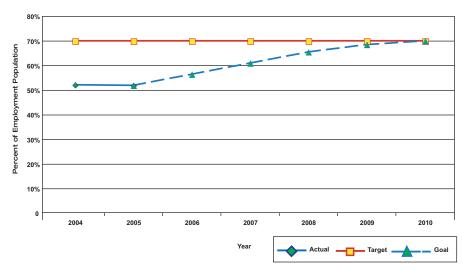


The number of people employed with a post-secondary education is off the target of 70%.

In 2005, the number slipped to 51.92% from 52.13% in 2004.

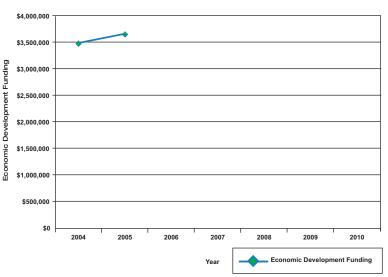
There was a decrease in people employed in most post secondary education types (certificates, diplomas, bachelors degrees, etc). However, there was an increase of people employed with qualifications above a bachelor's degree.

PERCENT OF EMPLOYMENT POPULATION WITH POST SECONDARY EDUCATION (NOVA SCOTIA) 2004 - 2010



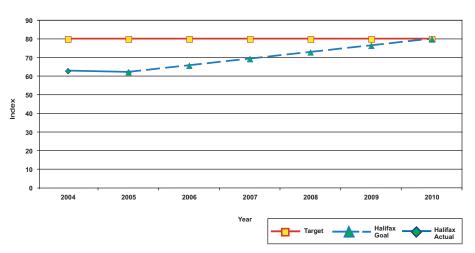
Support for economic development in Halifax has grown 5% from 2004 to 2005. In 2004 the amount of funding provided to the city's economic development agencies was \$3.47 million, and in 2005 it increased to \$3.65 million.

ECONOMIC DEVELOPMENT FUNDING IN HALIFAX 2004 - 2010



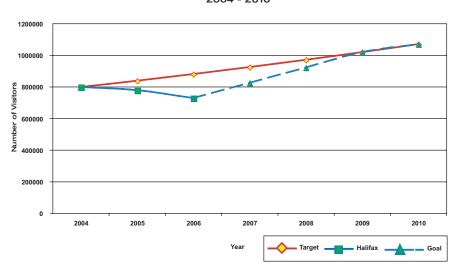
Halifax has maintained a consistent community satisfaction index rating of 62 in 2004 and 2005, but remains below the target of 80.

HALIFAX COMMUNITY SATISFACTION INDEX COMPARISON -HALIFAX AND TARGET 2004 - 2010



The tourism industry continued to take another hit in 2006. Visitor numbers to heritage sites have been steadily decreasing since 2004, and are well below target. As of October 2006, Halifax was off target by 6.39%.

VISITORS TO HERITAGE SITES HALIFAX AND TARGET 2004 - 2010





MEASURE

Attain High Community Satisfaction

TARGET

Reach 80 on the Community Satisfaction Index

SCORE





MEASURE

Increase Visitors

TARGET

Increase visitors to heritage sites by five percent per year in five years





MEASURE

Improve Average Income

TARGET

Increase average weekly wage to meet the Canadian average within five years

SCORE





MEASURE

Increase Room Nights Sold

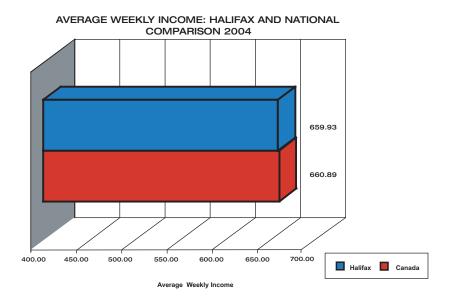
TARGET

By five percent per year

SCORE

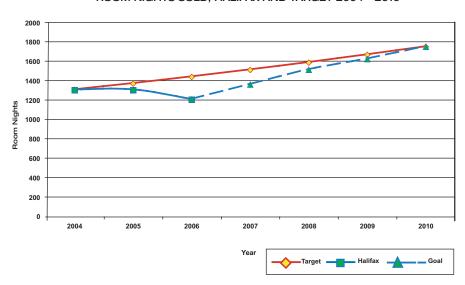


Halifax's average weekly income is on track and meeting the national average. In 2004, Halifax sat just below the Canadian average, but nevertheless on target: Halifax's average \$659.93, Canadian average \$660.89, a 0.14% difference.



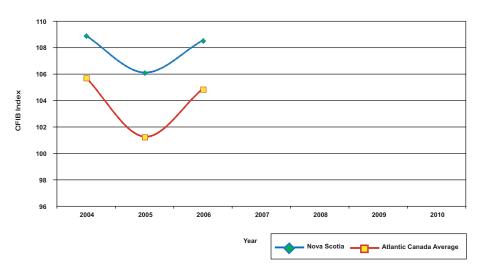
Room nights sold in Halifax were down in 2006 and heading in the wrong direction. In 2004 and 2005 the number of room nights sold in Halifax remained a consistent 1,307,000. However, in 2006 the number of rooms sold took a 7.5% dive to settle at 1,209,000.

ROOM NIGHTS SOLD; HALIFAX AND TARGET 2004 - 2010



Business confidence continues to thrive and remain on target. Since 2004 we have been maintaining a higher average of business confidence than the Atlantic average. In 2005 the level of confidence dropped down slightly but rebounded in 2006.

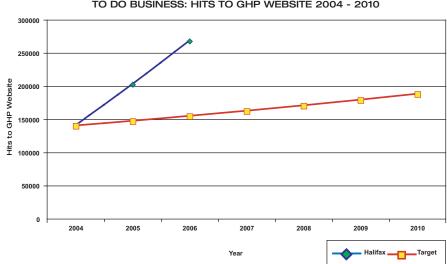
BUSINESS CONFIDENCE COMPARISON NOVA SCOTIA AND ATLANTIC CANADA AVERAGE 2004 - 2010



No action has yet been taken to put in place a brand strategy and/or a "Quality of Place" council.

The number of hits to Halifax business development organizations websites is presently exceeding 2006's target by 73%. In 2006 there were 268,331 hits to Halifax's economic development websites, the target was 155,159.

FOSTER GREATER AWARENESS OF HALIFAX AS A PLACE TO DO BUSINESS: HITS TO GHP WEBSITE 2004 - 2010



Our Awareness

MEASURE

Improve Business Confidence

TARGET

Improve business confidence over the next five years so that it is the highest in Atlantic Canada

SCORE





MEASURE

Enhance Brand Recognition

TARGET

Improve brand recognition of Halifax in national and international markets

SCORE





MEASURE

Foster Greater Awareness of Halifax as a place to do Business

TARGET

Increase by an average of five percent a year, over the next five years, the number of hits to Halifax business development organization websites



Our Partnerships

MEASURE

Joint Economic Development Initiatives Implemented

TARGET

Priority actions of the strategy are implemented

SCORE



MEASURE

Implement Gateway Strategy

TARGET

Have a fully operational gateway strategy up and running within one year

SCORE





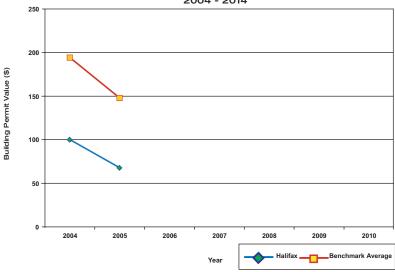
Six of the 11 high priority action items are showing satisfactory progress while five are showing inadequate progess. Please see page 22 for more details.



The Halifax Gateway Council has completed a very competent and comprehensive gateway strategy within the first year.

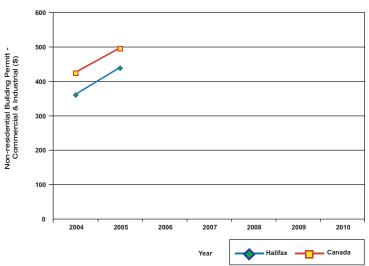
Halifax's per person public investment is considerably below the average of benchmark cities. In 2005, the average investment of benchmark cities was \$148.36. Halifax was \$68.17, or 46% less. The benchmark cities that Halifax was compared to are: Victoria, BC, London, ON, Regina, SK, St. John's, NF, and Quebec, QC.

PUBLIC INVESTMENT: COMPARISON HALIFAX AND AVERAGE BENCHMARK CITIES 2004 - 2014



Halifax's private investment remains below the national average. In 2005, Halifax's number rose to \$436.16 from \$361.13 in 2004, while the Canadian average grew slightly higher to \$496.15 from \$425.23.

PRIVATE INVESTMENT - COMPARISON HALIFAX AND NATIONAL AVERAGE 2004 - 2010





MEASURE

Increase Public Investment

TARGET

Increase per person public investment to be on par with benchmark cities.

SCORE





Business Climate

MEASURE

Increase Private Investment

TARGET

Have private investment above the national average within five years





MEASURE

Grow Commercial Tax Base

TARGET

Attain growth averaging three percent per year in five years

SCORE





MEASURE

Set Competitive Commercial Taxes

TARGET

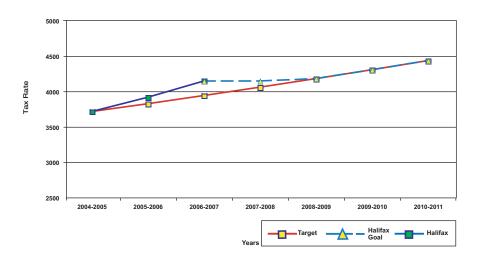
Have competitive levels of commercial taxation

SCORE



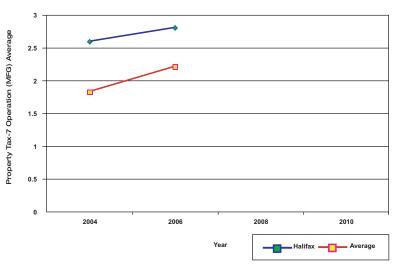
Halifax's commercial tax base has grown an impressive 12% since 2004 and is exceeding the targeted outcome.

COMMERCIAL PROPERTY TAX RATES COMPARISON HALIFAX AND TARGET 2004 - 2010



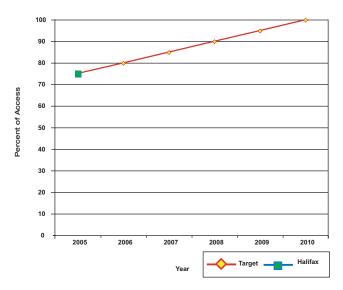
Halifax's commercial taxes are not competitive with other cities across Canada. In 2004, the property-based taxes per square foot of building space on a manufacturing operation in Halifax averaged US\$2.60. The average of other cities across Canada was US\$1.96. In 2006, Halifax increased to US\$2.81 and the Canadian city average climbed to US\$2.36.

COMPETITIVE COMMERCIAL TAX LEVELS AVERAGE CANADIAN CITIES (KPMG STUDY) AND HALIFAX 2004 - 2010



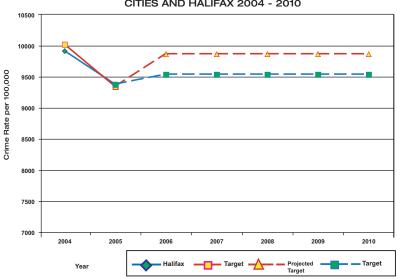
In 2005, Halifax had about 75% broadband access. While there isn't enough information at present to fully develop this trend, it is anticipated that various municipal projects over the next few years will help to increase this number and help this measure stay on target.

HRM BROADBAND ACCESS TARGET AND ACTUAL 2004 - 2010



Halifax's overall crime rate has decreased. Robbery, break and enter, and motor vehicle theft rates were down in 2005, although the homicide rate had gone up (from 2.4 to 2.6 incidents per 100,000). In 2004, the crime rate was below the average of similar Canadian cities. In 2005 Halifax was .04% above the average, but nevertheless on target. The average number of incidents in Canadian cities was 9,348 per 100,000. In Halifax the same year, the rate was 9,385 per 100,000. Halifax was compared with Windsor, ON, Hamilton, ON, Regina, SK, Victoria, BC, London ON, and Saskatoon, SK.

CRIME RATES: COMPARISON OF AVERAGE BENCHMARK CITIES AND HALIFAX 2004 - 2010





MEASURE

Enhance Access to Broadband

TARGET

Reach 100 percent broadband access within five years

SCORE



Business Climate

MEASURE

Reduce Crime Rate

TARGET

Decrease crime rate per 100,000 so it is below the average of similar Canadian cities within five years





MEASURE

Grow Employment in Capital District

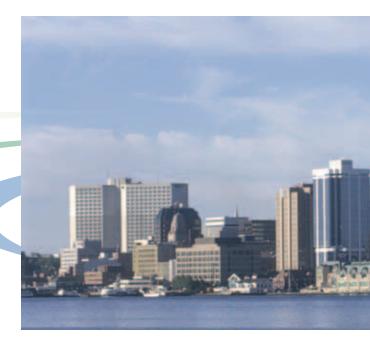
TARGET

Achieve growth of 1,000 jobs within five years

NO SCORE



Employment data on that geographical split does not exist.





MEASURE

Improve Decision Times for Construction Projects

TARGET

Achieve appropriate decision time for major projects that are below the average of benchmark cities within five years

NO SCORE



Data not yet available, working with Halifax Regional Municipality staff to acquire.

Unable to identify a source to develop this target.



A comprehensive business climate benchmarking capability has been established and has reached target. The Greater Halifax Partnership developed a series of questions for its smartgrowth business information database that will be used as a measurement to evaluate the business climate annually.

Business Climate

MEASURE

Increase Research and Incubation Space

TARGET

Increase research and incubation space by 100,000 sq ft within five years

NO SCORE





MEASURE

Benchmark Business Climate

TARGET

Establish a comprehensive business climate benchmarking capability within two years



Halifax Economic Strategy Eleven High Priority Actions



There are five goals identified in the Strategies for Success report: Supercharge our Labour Force, Leverage Our Creative Community, Create a Gung-Ho Business Climate, Capitalize On Our Reputation and finally, Convert Rivalries Into Partnerships. Under the umbrella of these five goals fall 94 activities to help guide Halifax's growth over five years.

Of those 94 activities, the advisory committee marked 11 as high priority with the intention that they were to be completed within the first year. They were considered priority actions as their implementation would lay the groundwork for the successful execution of the other 83 actions.

Over the past year there has been a variety of progress on the 11 high priorities. Some have seen excellent progress, some have begun to take form while others have not yet been started.

This report seeks to provide an independent review of the progress of the individual priorities, while keeping our commitment to our community and ensuring that these identified, important areas stay top of mind. The information used to evaluate the priorities came primarily from an evaluation report given to city council by Halifax Regional Municipality's CAO Dan English in December 2006. However, this report is our own and the Chamber takes responsibility for the analysis.

First year status of the 11 high priority actions:

- Six priorities are showing satisfactory progress (completed or near completion).
- Five priorities are showing inadequate progress (not yet started or stalled).

PRIORITIES MAKING SATISFACTORY PROGRESS:

PRIORITY 1:

Work with businesses, existing ethnic, cultural communities and recent immigrants to attract and retain new immigrants.

PRIORITY 2:

Develop and promote a compelling business case for retention, expansion and attraction of DND and other federal government offices.

PRIORITY 3:

Establish new and enhanced maintenance initiatives and standards with a focus on year-round, 24/7 accessibility. Engage through a public/private approach that emphasizes individual and business responsibility and stewardship.

PRIORITY 7:

Work with Nova Scotia trade partners to inform and educate HRM businesses about exporting. Identify and assist trade-ready companies to enter new markets.

PRIORITY 9:

Support rural economic development by encouraging and providing support services to those individuals and organizations establishing or maintaining businesses in rural areas.

PRIORITY 11:

Work to reduce congestion on the landside movement of container traffic in HRM by exploring alternatives like an inland terminal and using the rail cut for truck traffic. (Develop Halifax Gateway as east coast logistics hub.)

PRIORITIES MAKING INADEQUATE PROGRESS:

PRIORITY 4:

Build support and work to fast track social investment projects that are already well advanced.

PRIORITY 5:

Benchmark tax, regulation and development permit approvals/timing against competing cities.

PRIORITY 6:

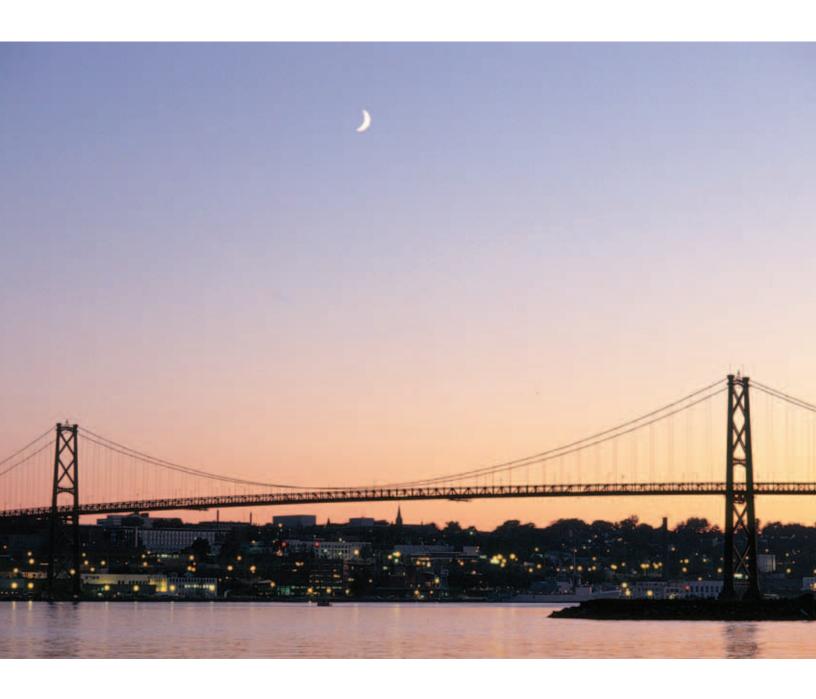
Bring infrastructure spending to appropriate comparable standards.

PRIORITY 8:

Establish a Quality of Place Council to review existing brand equity in HRM and develop a multi-partner approach to marketing HRM.

PRIORITY 10:

Work with all of our partners to identify common values and vision around growing our community. Create an "alignment of strategic intent" and "rules of engagement" to implement this vision.





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