

London Housing Advisory Committee

Report

1st Meeting of the London Housing Advisory Committee
December 12, 2018
Committee Room #4

Attendance PRESENT:: B. Odegaard (Vice Chair), A. Galloway, M. Inthavong, K. Kaill, J. Malkin, J. Peaire, D. Peckham, N. Reeves, J. Stickling: and P. Shack (Secretary)

ALSO PRESENT: J. Binder, J. Browne, S. Giustizia, G. Matthews, A. Scott and B. Turcotte

REGRETS: J. Coley Phillips and D. Nemeth

The meeting was called to order at 12:20 PM.

1. Call to Order

1.1 Disclosures of Pecuniary Interest

That it BE NOTED that no pecuniary interests were disclosed.

2. Scheduled Items

2.1 Rental Market Survey Update

That it BE NOTED that the attached presentation from A. Scott, Canada Mortgage and Housing Corporation, with respect to Rental Market Survey Update, was received; it being noted that the London Housing Advisory Committee held a general discussion, with respect to this matter.

3. Consent

3.1 9th and 10th Reports of the London Housing Advisory Committee

That it BE NOTED that the 9th and 10th Reports of the London Housing Advisory Committee, from its meetings held on October 10, 2018 and November 5, 2018, respectively, were received.

3.2 Municipal Council resolution adopted at its meeting held on November 20, 2018, with respect to the recruitment and appointment of Advisory Committee members for the up coming term

That it BE NOTED that the Municipal Council resolution from its meeting held on November 20, 2018, with respect to the recruitment and appointment of Advisory Committee members for the up coming term, was received.

3.3 ReThink Zoning Draft Terms of Reference

That discussion of the ReThink Zoning Draft Terms of Reference BE DEFERRED to the next London Housing Advisory Committee meeting.

4. Sub-Committees and Working Groups

None.

5. Items for Discussion

5.1 Western Off-Campus Survey - G. Matthews

That it BE NOTED that the attached presentation from G. Matthews with respect to the Western Off-Campus Survey, was received.

6. Deferred Matters/Additional Business

None

7. Adjournment

The meeting adjourned at 2:05 PM.

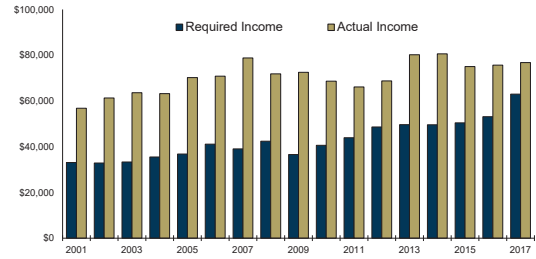


London Housing Advisory Committee Meeting December 12, 2018

Canada



Required income to purchase average home increasing faster than actual household income.

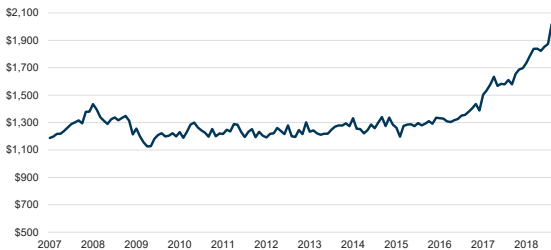


Source: CMHC, Statistics Canada
Required income is mortgage carrying costs divided by 0.32 to reflect the usual 32 per cent gross debt service ratio. Mortgage carrying costs are calculated based on a 10 per cent down payment, the posted fixed five-year mortgage rate and the longest available amortization for a mortgage.

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Mortgage payment on average priced home rising

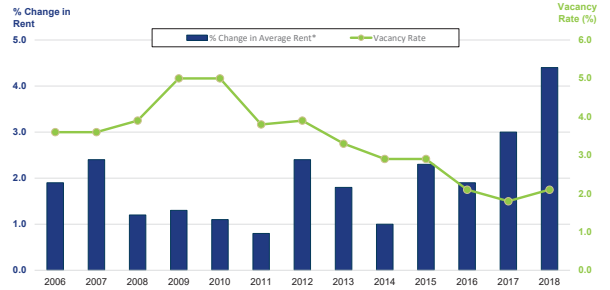
Mortgage payment* based on MLS® average price, London and Surrounding Area



Source: CREA, CMHC calculations
Assumptions: Average home price with 5% down payment amortised over 25 year at five year conventional mortgage rate

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Historically low vacancy rate resulting in rising rents

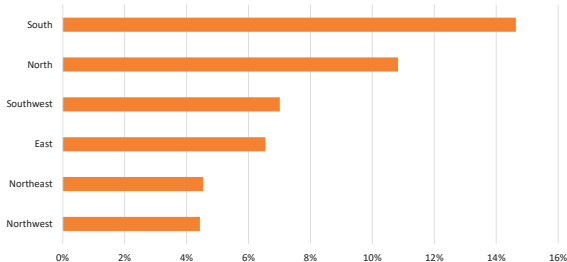


Source: CMHC
*Same sample rent increases

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Penalty to move resulting in lower turnover

% Difference between rent for vacant and occupied units, two-bedrooms by area



Source: CMHC

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Unemployment rate trending down, yet low participation rate signals more slack

Unemployment rate (%), seasonally adjusted, London CMA

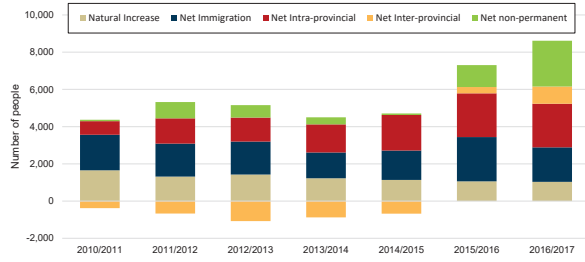


Source: Statistics Canada
Last data point: September 2018

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Strong migration pushing up population growth

Contribution to population growth by component, London CMA

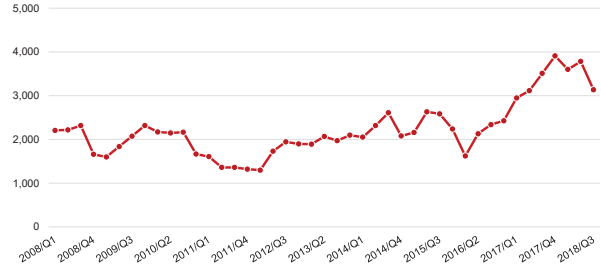


Source: Statistics Canada
Note: 2016/17 are preliminary estimates

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Number of units under construction lower in 2018, but remain elevated

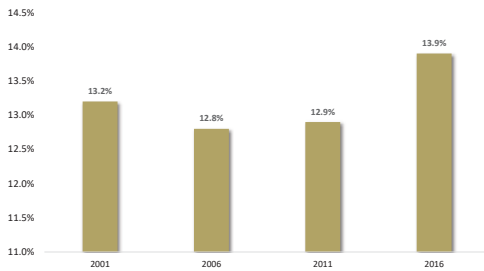
Number of Units Under Construction, London CMA



Source: CMHC
Last data point: 2018 Q3

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Share of households in core housing need



Source: CMHC, Statistics Canada (Census)
London CMA

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Core housing need is derived in two stages

- Whether the household was living in a dwelling considered unsuitable, inadequate or unaffordable.
 - Suitability identified whether the dwelling had enough bedrooms according its occupants needs.
 - Housing adequacy was assessed based on the dwelling condition being reported in need of major repairs.
 - A shelter-cost-to-income ratio of less than 30% was required to deem the housing affordable.
- Whether the household could be expected to have affordable access to suitable and adequate alternative housing by comparing the household's total income to an income threshold based on local housing costs. Only those households who could not afford alternative housing would be considered in core housing need.

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Who is in core housing need?

- 80% had household incomes less than \$30,000
- 76% are renters
- 64% were renting in non-subsidized housing
- 56% lived alone
- 25% were seniors (65+)
- 23% were lone-parent families

Source: CMHC, Statistics Canada (Census 2016)
London CMA

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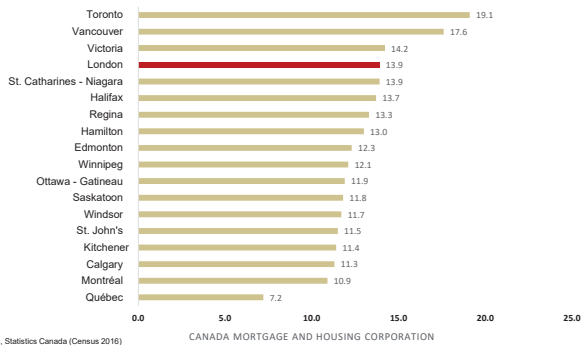
Why are households in core housing need?

- 92% were below affordability measure
 - 40% paid more than 50% of income on housing
- 13% were below adequacy measure
- 9% were below suitability measure

Source: CMHC, Statistics Canada (Census 2016)

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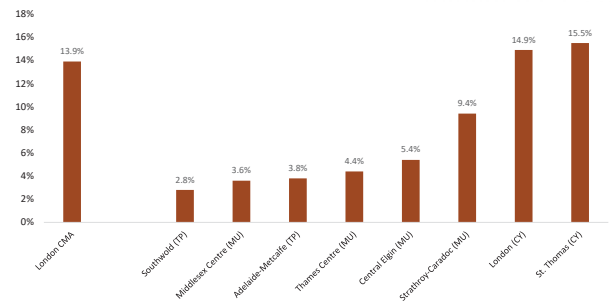
Percentage share of households in core housing need by large and mid-sized cities



Source: CMHC, Statistics Canada (Census 2016)

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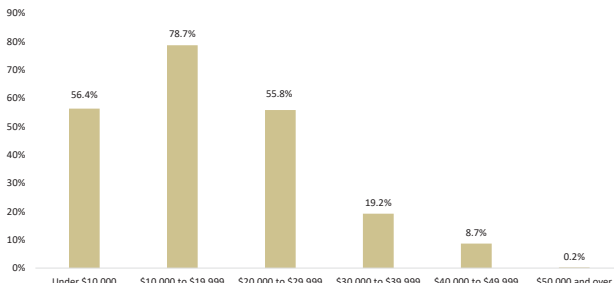
Share of households in core housing need



Source: CMHC, Statistics Canada (Census 2016)

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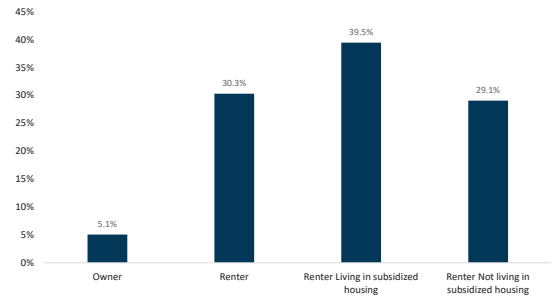
Core housing need by household income group



Source: CMHC, Statistics Canada (Census 2016)

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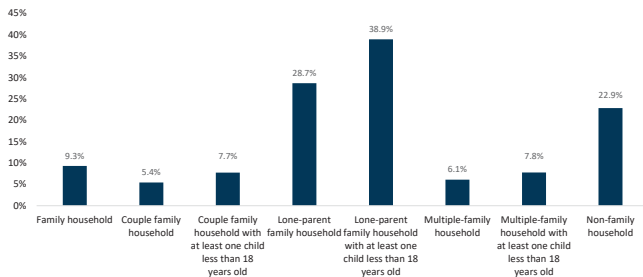
Share of households in core housing need by tenure



Source: CMHC, Statistics Canada (Census 2016)

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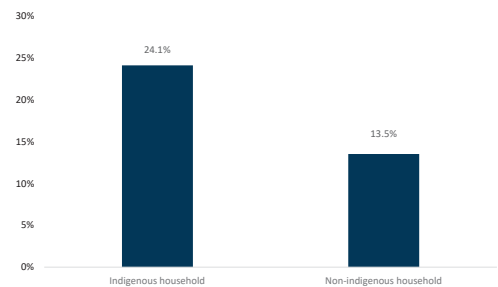
Share of households in core housing need by household type



Source: CMHC, Statistics Canada (Census 2016)

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Share of households in core housing need by aboriginal status



Source: CMHC, Statistics Canada (Census 2016)

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Summary

- Economic and population growth increasing demand for housing, whether it be rental or ownership tenure.
- Affordability deteriorating for a greater portion of households.
- Low vacancy and turnover rates, as fewer renters transitioning into homeownership.
- Rents increasing above rate of inflation.

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CANADA MORTGAGE AND HOUSING CORPORATION



London Housing Advisory Committee

Report

9th Meeting of the London Housing Advisory Committee
October 10, 2018
Committee Room #1

Attendance

PRESENT: B. Odegaard (Vice Chair), A. Galloway, M. Inthavong, D. Nemeth, J. Peaire, D. Peckham, N. Reeves, J. Stickling: and P. Shack (Secretary)

ALSO PRESENT: G. Matthews and S. Giustizia

REGRETS: J. Coley Phillips and J. Malkin

The meeting was called to order at 12:24 PM.

1. Call to Order

1.1 Disclosures of Pecuniary Interest

That it BE NOTED that no pecuniary interests were disclosed.

2. Scheduled Items

2.1 Inclusionary Zoning Update

That it BE NOTED that the ~~attached~~ presentation from G. Barrett, Manager, Long Range Planning and Research, with respect to Inclusionary Zoning Update, was received.

3. Consent

3.1 7th and 8th Reports of the London Housing Advisory Committee

That it BE NOTED that the 7th and 8th Reports of the London Housing Advisory Committee, from its meetings held on July 11, 2018 and September 12, 2018, respectively, were received.

3.2 Letter of Resignation - Nickey Calford

That it BE NOTED that a communication dated July 10, 2018 from N. Calford with respect to her resignation from the London Housing Advisory Committee, was received.

4. Sub-Committees and Working Groups

None.

5. Items for Discussion

5.1 LHAC Terms of Reference

That consideration of the London Housing Advisory Committee(LHAC)Terms of Reference BE DEFERRED to a future meeting of LHAC.

5.2 Mayors New Years Honour List

That consideration of the Mayors New Years Honour List BE DEFERRED to the next meeting of the London Housing Advisory Committee.

6. Deferred Matters/Additional Business

6.1 (ADDED) November Meeting

That it BE NOTED that the November meeting of the London Housing Advisory Committee has moved from November 14th, 2018 to November 5th, 2018.

7. Adjournment

The meeting adjourned at 1:50 PM.

London Housing Advisory Committee

Report

10th Meeting of the London Housing Advisory Committee
November 5, 2018
Committee Room #5

Attendance

PRESENT: J. Coley Phillips (Chair), D. Nemeth, B. Odegaard, J. Peaire, N. Reeves; and P. Shack (Secretary)

ALSO PRESENT: J. Browne, S. Giustizia and G. Matthews and D. Purdy

REGRETS: A. Galloway, M. Inthavong, J. Malkin, D. Peckham and J. Stickling.

The meeting stood adjourned at 12:45 PM, due to lack of quorum.



London
CANADA

P.O. Box 5035
300 Dufferin Avenue
London, ON
N6A 4L9

November 21, 2018

C. Saunders
City Clerk

I hereby certify that the Municipal Council, at its meeting held on November 20, 2018 resolved:

That the following actions be taken with respect to the recruitment and appointment of Advisory Committee members for the up-coming term:

- a) the recruitment for voting members, BE UNDERTAKEN;
- b) the appointments for the above-noted recruitment BE LIMITED to a term from June 1, 2019 to February 28, 2021; it being noted that the current terms of Advisory Committee members will be extended to the date of June 1, 2019; and
- c) the City Clerk BE DIRECTED to report back to the Corporate Services Committee with respect to input from current Advisory Committee members related to existing Terms of Reference and the recommendations from the Diverse Voices for Change project, prior to the end of February 2019. (2.4/20/CSC) (2018-C04)

C. Saunders
City Clerk
/hw

cc: B. Westlake-Power, Deputy City Clerk
M. Schulthess, Manager of Legislative Services
H. Lysynski, Committee Secretary
J. Bunn, Committee Secretary
P. Shack, Committee Secretary



MEMO

To: City of London Advisory Committees

From: Justin Adema

Department: Planning Services

Date: October 31, 2018

Re: **ReThink Zoning Draft Terms of Reference**

The City is in the beginning stages of a new project called ReThink Zoning, which includes preparing a new Zoning tool that will replace the current Zoning By-law. The new by-law is needed to be consistent with the London Plan and implement its vision and policy direction.

Draft Terms of Reference were prepared and sent to the Planning and Environment Committee on August 13, 2018, following this Council gave direction to circulate the draft Terms of Reference to stakeholders, agencies, and the public for comments.

City Advisory Committees are now asked to review the Draft Terms of Reference before a finalized version is brought to Council for approval. Opportunities will be provided for Advisory Committees to comment throughout the ReThink Zoning process, and these Terms of Reference will frame what that process will include and establishes the goals, objectives, and desired outcomes for the new by-law.

1.0 ReThinking Zoning in London

In 2011, the City of London – including Council, staff, and all of its citizens – began a conversation about the future of our city. It started with a launch event where Peter Mansbridge spoke about the importance of civic engagement in a successful local government, and ended in June, 2016 when City Council adopted the London Plan – a new plan for growth and development in our city.

The London Plan is the culmination of a community conversation, it represents the shared vision, values, and goals for all Londoners. The Plan's key directions are a summary of this vision for the City, and the rest of plan provides a framework to achieve that vision. The next step in the process of planning our city is to examine tools that help us realize the vision we have set.

One important tool to achieving the planning framework articulated in The London Plan is the zoning by-law. London's current zoning by-law is dated, having been prepared following the approval of the 1989 Official Plan to help implement that Plan. With The London Plan we have a new, more strategic approach to City Building that requires a new by-law for its implementation.

ReThink Zoning is a continuation of the original conversation about how Londoners want to see their City grow – only the focus has now shifted from broader policy matters to more technical questions about how we should realize the vision. Instead of asking Londoners what kind of city do you want to live in, we will be working with Londoners to determine how we should get there and how each development across the city should be considered.

1.1 Implementing the London Plan

The London Plan provides a strategic approach to development in London that is based on City Building policies, a City Structure Plan, and a variety of place types. The City Building Policies provide the over-arching direction for how we will grow as a city over the life of the Plan and define the shape, character and form of the City. The City Structure Plan identifies five key foundations that inform the other policies of the Plan: The Growth Framework, The Green Framework, The Mobility Framework, The Economic Framework, and The Community Framework. Each place type is planned to play a unique role within the City Structure and has its own identity and character. The place types work together to create a complete city. All aspects of the place type must contribute to the achieving the Plan's objectives, including the use, intensity, and form of every building and parcel of land.

Zoning is the tool that we currently use to regulate the land use, intensity, and form of development. Therefore, zoning should be viewed as an extension of the Plan and a mechanism to meet its City Building goals. A zoning tool that is linked intrinsically to the policy direction of the London Plan is necessary for the implementation of the Plan.

1.2 Legislated requirements

In addition to requiring our regulatory tools to align with The London Plan, there are also legal issues to consider. The *Planning Act* is the applicable legislation for planning matters in Ontario. It is what requires the City of London to have an Official Plan and permits the City to regulate development as a way of implementing the Plan. The *Act* says that no by-law shall be passed that does not conform with the Official Plan (Section 24(1)). The *Act* also requires that when an Official Plan is updated after a comprehensive review, a municipality shall update the zoning by-law within three years of coming into effect (Section 26(9)). Because The London Plan completely replaces the 1989 Official Plan, it is appropriate to replace the Zoning By-law with a new by-law that conforms to its policies within three years.

2.0 Overarching Goal, Objectives, and Desired Outcomes

This is a major project that will have a lasting impact on how London will be shaped to meet the vision established in The London Plan. This section describes the guiding principles for the project.

2.1 Overarching Goal

To continue the momentum of ReThink London, implement the new London Plan, and foster the growth and development of a great city.

1.2 Objectives

- To create the best implementation tool to fit London's current and future needs
- To implement The London Plan's vision, values, and key directions
- To implement The London Plan place types in terms of use, intensity, and form
- To create a user-friendly and plain language document while recognizing the regulatory nature of the by-law
- To make use of new technologies available for the application and administration of zoning
- To allow for flexible application of the by-law while maintaining a level of certainty and predictability
- To create a tool that allows for efficient planning processes

2.3 Desired Outcomes

- Quality developments across the City that contribute to our city-building goals
- Efficient planning processes that result in great neighbourhoods
- A by-law that can be understood by all users involved in the planning process – including developers, professionals, community groups, and the general public
- A by-law that meets all legislative requirements, is defensible on its planning merits, and includes clear, enforceable regulations.
- A by-law that is intrinsically linked to The London Plan with obvious connections to the use, intensity, and form requirements of the place types as well as the City Building and Our Tools parts of the Plan.

3.0 Work Plan

ReThink Zoning is not just about updating the Zoning By-law Z.-1 to match the London Plan place types. It will consider the full range of possibilities that are available under the *Planning Act* and will look carefully at approaches being taken in other cities to see whether there are opportunities to improve on how we regulate development in our city. The work plan will include time for the research to be completed and analyzed, and needs to be flexible to allow later stages to fit with whatever direction or approach is identified as the best fit in London. To achieve this, a two-phase work plan is proposed. Details are provided for Phase One, however Phase Two will be refined after the details of the types of tools and approaches will be utilized has been confirmed through Phase One. Detailed Terms of Reference for Phase Two are included as a deliverable in Phase One.

3.1 Phase One

Phase One will provide an opportunity to investigate alternate approaches to development regulation and determine what tools should be used to implement the London Plan to achieve its goals.

Tasks to be completed in Phase One include:

- Prepare an RFP and work plan for the completion of Phase One
- Retain a consultant to work collaboratively with staff to complete Phase One
- Complete background research with regards to:
 - Ontario legislated requirements for zoning, including options available to municipalities for the implementation of Official Plans
 - The London Plan policies and directions, in regards to compatibility with different development regulation options available in Ontario

- Best practices from North America and other comparable parts of the world
- Review existing Zoning By-law No. Z.-1 to identify areas of strength or concern, determine what is working and what needs improvement to achieve the overall goals
- Engagement with key stakeholders to assess strengths and weaknesses of our current by-law and the desired outcomes of a new by-law
- Public engagement program to listen to ideas, concerns, and suggestions from Londoners
- Identify key elements/components/areas to be addressed through the new zoning by-law
- Recommend the best zoning approach to implement the policy directions of The London Plan
- Prepare Terms of Reference for Phase 2 – the preparation of the by-law, based on the direction provided by Council

Deliverables to be submitted in Phase One include:

Deliverable	Assignment
● Terms of Reference (Phase 1) – to include Community Engagement Strategy for Phase 1	Prepared by staff
● Request for Proposal (RFP) for consultant to undertake Phase 1	Prepared by staff
● Background Paper – overview of research and engagement findings and linkages to The London Plan	Prepared by consultants
● Recommendation Report – Analysis of issues, recommended tool, draft terms of reference for Phase 2	Prepared by staff, based on recommendations from the consultants
● Terms of Reference (Phase 2) – to include Community Engagement Strategy for Phase 2	Prepared by staff

3.2 Phase Two

Phase Two is when the new by-law will be prepared, based on the approach confirmed through Phase One. The information in this section is general in nature and will be clarified in the detailed Terms of Reference to be prepared in Phase One.

Tasks that will be completed in Phase Two include:

- Prepare a detailed inventory of existing development
 - Review land use
 - Review intensity – may include height, gross floor area, coverage, floor plate area, density in units per hectare, number of bedrooms, parking, floor area ratio
 - Review form – may include site layout (parking, landscaping, orientation, setbacks, and building location on a site), and buildings (massing, step-backs, materials, architecture)
 - Identify and analyze patterns of development to assist in property-appropriate zoning tools
 - Where appropriate, use new technologies to obtain this information (may include LiDAR, remote sensing, or other technologies)
- Analyze and recommend technologies for the administration and presentation of zoning information
 - Explore opportunities of GIS based applications
- Prepare outline of by-law, consideration to be given to:
 - Organization – chapters, types of zones, etc
 - Layout – use of tables, figures, illustrations, document design, etc
- Prepare and test sample zones against existing conditions and potential development opportunities

- Prepare first draft of by-law, provide opportunity for stakeholder and public comments
- Prepare second draft of by-law, circulate for stakeholder and public comments
- Review required amendments to other city by-laws/documents resulting from the replacement of the current zoning by-law
- Prepare final by-law for approval

Deliverables to be prepared in Phase Two include:

- Inventory and analysis of existing development
- Mapping/zoning data overview and recommendation
- First Draft By-law
- Second Draft By-law
- Results of public and stakeholder feedback
- Amendments to other City by-laws and documents
- Final By-law for approval

Note that the deliverables will be prepared by a combination of City staff and consultants. The specific breakdown of responsibilities will be defined through the detailed Phase Two terms of reference.

3.3 Project Scope

The nature of large projects such as ReThink Zoning often includes “scope creep” resulting from the encroachment of additional tasks than was originally planned. It is important to ensure that the scope of this project remains focused in order to achieve the milestones identified in the Project Schedule.

3.4 Project Schedule

Work to be completed	Target completion date
Terms of Reference and RFP for Consultant(s)	Q4, 2018
Retain consultants	Q2, 2019
Background Paper	Q3, 2019
Recommendation Report	Q4, 2019
Terms of Reference – Phase 2	Q4, 2019
Phase 2	TBD – based on TOR

4.0 Project Team

Staff from various departments within the Corporation as well as a consulting team will contribute to the success of ReThink Zoning. This section describes the roles of staff and the consultant to be retained on the project.

4.1 City Staff

This project is part of the Planning Services work plan and will be completed at the direction of the Managing Director, Planning and City Planner. The project lead will be the Manager, Current Planning and the project manager will be a Planner from Planning Services. However, given the scope of this project, significant participation from across all Service Areas of the City of London will be required. Of particular importance will be the contributions of Development & Compliance Services staff, who play a critical role in the implementation of the Zoning By-law. This important role will be reflected in the makeup of the various teams working on the project.

At the outset, three groups of staff will be established to contribute to the completion of this important project. The Project Team will be the main group working on the project on a daily basis, a Steering Committee will be established to provide guidance to the Project Team and contribute at key decision points, and a Technical Resource Group will include staff from virtually every Service Area in the City. This group will review materials and provide input as needed at various points in the process. Some members will play large roles while others will only be required to contribute at certain points.

4.1.1 Project Team

The project team will be responsible to complete the work plan of ReThink Zoning and will be the main contact for consultants retained on this project. The Project Manager will provide leadership to this team by delegating tasks, chairing meetings, and being the main source of information/communication on behalf of the project team. The makeup of the project team will include:

- Manager, Current Planning – Planning Services (Project Lead)
- Planner, Long Range Planning & Research – Planning Services (Project Manager)
- Planner, Current Planning – Planning Services
- Urban Designer – Planning Services
- Manager, Development Planning – Development Services
- Business and Zoning Coordinator, Zoning – Development & Compliance Services

4.1.2 Steering Committee

The Steering Committee will be made up of senior leaders at the City and managers with portfolios that interface with the Zoning By-law. The Role of the Steering Committee will be to provide input, advice, and guidance to the Project Team and will be particularly involved at any key decision point during the project. The Steering Committee will include:

- Managing Director, Planning and City Planner – Planning Services (Steering Committee Chair)
- Managing Director, Development and Compliance Services and Chief Building Official – Development & Compliance Services
- Managing Director, Environmental and Engineering Services and City Engineer
- Director, Development Services – Development & Compliance Services
- Manager, Current Planning – Planning Services
- Manager, Long Range Planning and Research – Planning Services
- Manager, Urban Regeneration – Planning Services
- Manager, Development Services (Site Plan) – Development & Compliance Services
- Manager, Zoning and Public Property Compliance – Development & Compliance Services
- Solicitor II, Legal and Corporate Services

4.1.3 Technical Resource Group

Most internal Service Areas and divisions will contribute at some point during this project. They will not be required to play a major role for all phases of the project but will provide input as needed. Individuals from the divisions/Service Areas listed below will contribute, and other groups may be added depending on the nature of input required.

The Technical Group will comprise staff from Planning Services, Development and Compliance Services, Environmental and Engineering Services, the City Clerk's Office, Corporate Communications, and Neighbourhood, Children and Fire Services.

4.2 Hiring Consultants

Given the scope and complexity of this project, consultants will be retained to support staff in completing the work plan and providing specialized expertise throughout the process. A request for proposals for the Phase One consultant will be prepared and issued following the approval of these terms of reference. Contracts for this project will be divided into the project phases, recognizing that the best zoning approach is identified at the end of Phase One and may require specific knowledge and experience that is beyond the Phase One consulting team.

The selected consultant(s) will have a strong background in planning implementation, and should include experience with various approaches to zoning. The consultant team will need to be able to understand the approach taken through The London Plan and identify ways to achieve its objectives through development regulation. The consultant team will demonstrate the values that guide all planning decisions in London – these are

to be accountable, be collaborative, demonstrate leadership, be inclusive, be innovative, and think sustainably.

It is anticipated that there will be a team of consultants retained as multiple areas of expertise will be required. Some of the specialized areas include:

- Land use planning – ReThink Zoning is a planning review first and foremost. It is required that the lead consultant will include professional planners.
- Urban design – The London Plan integrates urban design into the planning process and approaches to regulation that consider how to ensure an engaging and attractive public realm will be important.
- Mapping/GIS – new and innovative approaches to the mapping components of the zoning by-law are encouraged, and it is expected that the consulting team will bring expertise on this issue.
- Community engagement – public input is important to the success of this project. Effective engagement with the community must be integrated into all parts of the project.
- Application review processes – implementation of the new by-law must work for those who are applying and interpreting the by-law, therefore consideration of this and other administrative matters must be included. The consulting team should have experience and insight into how the new by-law would be “operationalized”.

4.2.1 Expectations and responsibilities

The consulting team will work closely with the Project Manager and Project Team to complete the work plan for this project. Deliverables will be submitted to the Project Team who will coordinate with the Steering Committee and make recommendations, based on the information provided by the consultants, to City Council. The Work Program section of this report identifies what tasks will be led by the consultant team.

5.0 Community Engagement and Information Sharing

This project requires input from a variety of stakeholders, agencies, and the public if it is to be successful. This project will give direction to the way we grow as a city and will shape our neighbourhoods, urban centres, and other places within London. While the intent is not to engage in a discussion about first principles – issues like the city structure and the vision for each place type have been established through The London Plan – there is plenty of opportunity for stakeholders and the public to help shape our approach to how we implement the Plan.

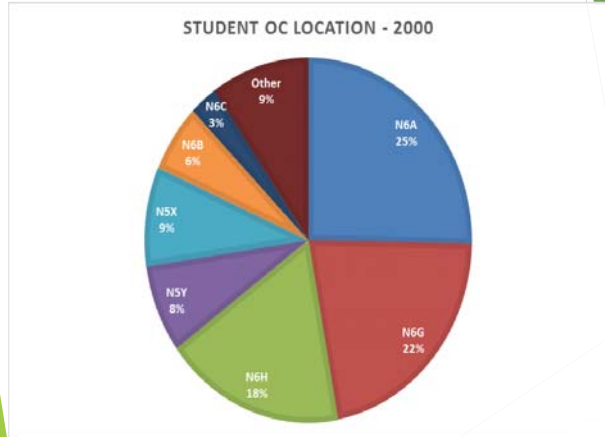
Equally important during this project is the availability of information. People will want to know where this project stands, what opportunities they will have for participation, and how changes to the zoning by-law could affect their properties and communities. Through the various tools available, including the city website, social media, open houses, traditional advertising, and other approaches, we will strive to provide up-to-date and useful information to the public regarding the project.

All members of the public are invited to participate throughout the ReThink Zoning process. Some key stakeholders have been identified and will be invited to meet with staff and discuss the options to replace our zoning by-law. These stakeholders include:

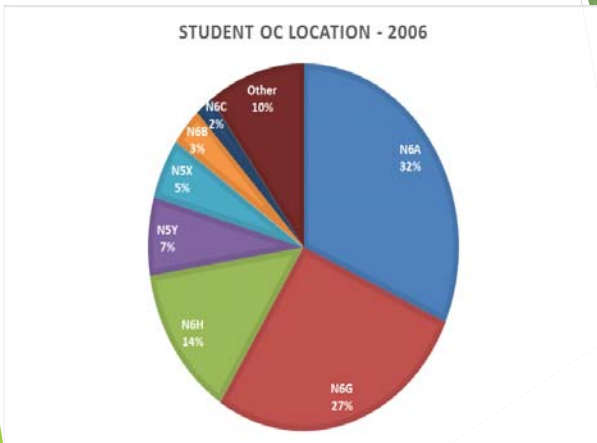
- All City Service Areas
- Advisory Committees to Council
- Public agencies – eg: London Economic Development Corporation, Upper Thames River Conservation Authority, London Hydro, London Housing Development Corporation, Ministry of Municipal Affairs.
- Community organizations – eg: business improvement areas, the Urban league of London, neighbourhood associations, ratepayer groups.
- The Development Industry – eg: London Development Institute, London Home Builders Association, London Association of Planning Consultants, and other members of the Building and Development Liaison Forum.

Western Off-Campus Survey

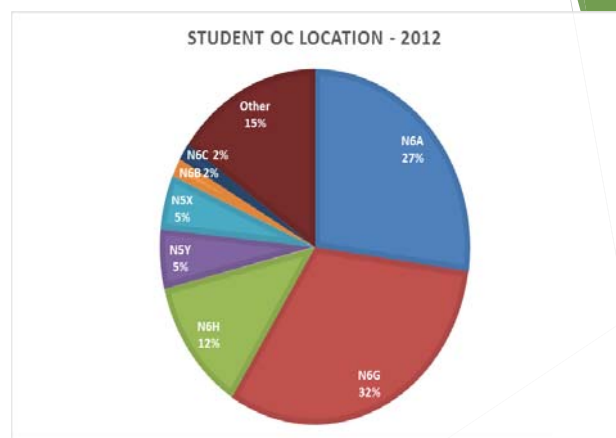
Western OC Survey 2000



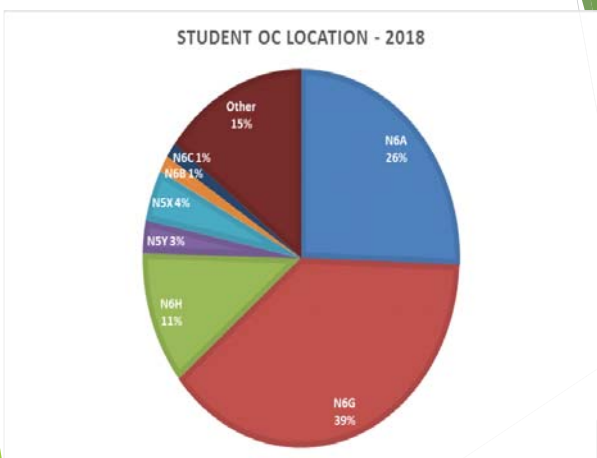
Western OC Survey 2006



Western OC Survey 2012



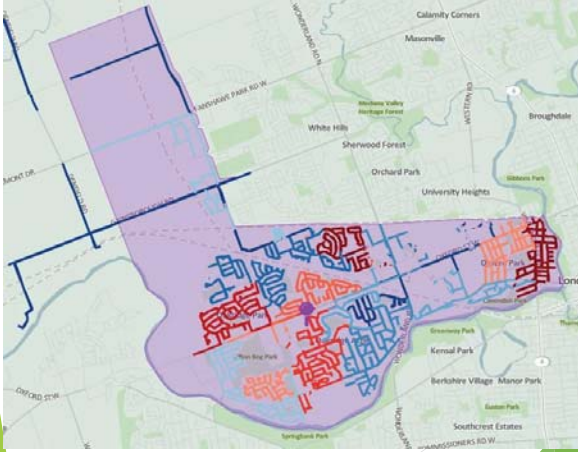
Western OC Survey 2018



Western OC Survey - N6A



Western OC Survey - N6H



Western OC Survey - N6G



Western OC Survey

- Significant changes between 2000 and 2018
- NGG has gone up 17%
- N6A has fluctuated but basically the same
- N6H down 6%

Western OC Survey

- ▶ Factors in renting
 - ▶ Location, Location, Location
 - ▶ Price
 - ▶ Number of Bedrooms

Western OC Survey

- ▶ Areas which had a lot of student tenants 25-30 years ago but are now off the mindset
- ▶ Kipps Lane
- ▶ White Hills

Western OC Survey

- ▶ Grad students now live where undergrad live

Western OC Survey

- ▶ Issues for OC Students
 - ▶ Maintenance
 - ▶ Distance to facilities
 - ▶ Connection to other students

Western OC Survey

- ▶ I pay ...
 - ▶ 10% pay nothing (at home)
 - ▶ 7% less than \$400
 - ▶ 56% between \$401 and \$600
 - ▶ 16% between \$601 and \$800
 - ▶ 11% pay more than \$801