Report to Planning and Environment Committee

To: Chair and Members  
Planning & Environment Committee

From: John M. Fleming  
Managing Director, Planning and City Planner

Subject: City of London  
Community Improvement Plans – New Measures and Indicators of Success

Meeting on: May 13, 2019

Recommendation

That, on the recommendation of the Managing Director, Planning and City Planner, the following report with respect to draft measures and indicators of success for the financial incentives programs offered through the City of London’s Community Improvement Plans BE RECEIVED for information.

IT BEING NOTED that these measures will be circulated for feedback and modified as necessary within a future report to Municipal Council to include the measures within the relevant Community Improvement Plans.

Executive Summary

The Community Improvement Plan (CIP) Service Review was completed in 2017 with numerous recommendations for changes to the existing financial incentive programs including the introduction of new performance measures and indicators of success. This report provides an update on the preliminary measures and indicators of success that Staff are now considering. The next steps in the process are to consult with stakeholders on the proposed measures and targets, develop methodology to ensure consistent measuring over time, and bring a future report to PEC to amend the CIPs and adopt the measures.

Background

1.0 Previous Reports

Previous reports pertinent to this matter are summarized in Appendix A.

2.0 Introduction

A Community Improvement Plan is a tool prescribed by Section 28 of the Planning Act intended to re-plan, redesign, redevelop, and rehabilitate a designated area (the community improvement project area) because of age, dilapidation, overcrowding, faulty arrangement, unsuitability of buildings or for any other environmental, social or community economic development reasons.

A community improvement project area can be the entire municipality or defined portions of the municipality. Community improvement requires policies in the City’s Official Plan in order to authorize Municipal Council to undertake the preparation of CIPs.

The Planning Act defines community improvement as “…the planning or replanning, design or redesign, resubdivision, clearance, development or redevelopment, construction, reconstruction and rehabilitation, improvement of energy efficiency, or any of them, of a community improvement project area, and the provision of such residential, commercial, industrial, public, recreational, institutional, religious, charitable or other uses, buildings, structures,
works, improvements or facilities, or spaces therefor, as may be appropriate or necessary."

The Ontario Ministry of Municipal Affairs and Housing Community Improvement Planning Handbook lists the following as objectives of a CIP:

- To focus public attention on local priorities and municipal initiatives;
- To target areas in transition or in need of repair, rehabilitation and redevelopment;
- To facilitate and encourage community change in a co-ordinated manner;
- To stimulate private sector investment through municipal incentive-based programs.

It is because of the City’s ability to provide incentive-based programs (grants and loans) that community improvement is often used as a tool to encourage and support community and economic redevelopment. In other words, the City may provide incentives to encourage private sector entities to invest in a way that supports the City’s policy goals and objectives – such as improving buildings, investing in an area in need of improvement, or contributing to the economic development of an area.

It is important to recognize that CIPs go beyond just providing financial incentives to property owners. For example, the Hamilton Road Area CIP includes a variety of actions related to public realm improvements, safety, and parks improvements.

The 2015-2019 Strategic Plan identifies Municipal Council’s vision, mission, values and strategic areas of focus for 2015 to 2019. Municipal Council has recognized the importance of improving neighbourhoods and communities in its Strategic Plan. In particular, the Urban Regeneration strategy to use community improvement plans to coordinate City and private investment to meet both local and city-wide priorities, as well as investing more in heritage restoration, brownfield remediation, urban regeneration, and community improvement projects.

Though in draft at the time of writing this report, the 2019-2023 Strategic Plan continues to include the theme of community improvement in its outcomes, expected results, and strategies.

### 3.0 Community Improvement Plan Service Review

The Civic Administration undertook an extensive CIP Service Review in 2016 and 2017, which resulted in a May 2, 2017 Municipal Council resolution. The CIP Service Review recommended changes to existing financial incentive programs, introduced financial incentive programs to new or expanded areas, and requested the CIPs be amended to include performance measures and indicators of success.

This report will focus on the measures and indicators of success. The relevant clause of the May 2, 2017, Municipal Council resolution is provided below.

At its meeting held on May 2, 2017, Municipal Council resolved:

n) that Community Improvement Plans for the following Community Improvement Plan Project Areas BE AMENDED to include performance measures and indicators of success to align with current City policies and Council strategic directions:

- i) Airport Area Community Improvement Plan;
- ii) Brownfield Community Improvement Plan;
- iii) Downtown Area Community Improvement Plan (including the “Richmond Row” expansion area);
- iv) Heritage Community Improvement Plan;
- v) Industrial Community Improvement Plan;
- vi) Old East Village Community Improvement Plan; and
- vii) SoHo Area Community Improvement Plan;
Historically, the City’s CIPs have not included measures to identify when a community or neighbourhood was considered improved and no longer in need of financial incentives. This report outlines Staff’s preliminary ideas for new measures and indicators of success for the Downtown, Old East Village, SoHo, Hamilton Road Area, and draft Lambeth CIP financial incentive programs. These five CIPs are being grouped together because they focus on commercial/mixed-use areas and offer the same loan and grant programs. The other CIPs (Airport Area, Brownfield, Heritage, and Industrial Lands) will be looked at individually at a future date.

The Hamilton Road Area CIP was adopted after the CIP Service Review was completed. The Lambeth CIP is in draft and is anticipated to be adopted later in 2019. These CIP were written to include success measures and baseline conditions. Despite these CIPs not being included in the aforementioned Municipal Council resolution, the success measures will be monitored, evaluated, and updated as needed to ensure consistent measures and indicators of success are used for the related financial incentive programs across all CIPs.

Financial Incentive Programs

The following section outlines: (1) the financial incentive programs offered through the Downtown, Old East Village, SoHo, Hamilton Road Area, and draft Lambeth CIPs, (2) the existing measures found in the program guidelines for each loan or grant, as well as (3) discusses the new measures and indicators of success Staff are considering to implement. Table 1 provides a summary of the available financial incentive programs.

Table 1 Financial Incentive Programs (2019)

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<th>CIP (Year Adopted)</th>
<th>Financial Incentive Programs</th>
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<td>Downtown (1996)</td>
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<td>Forgivable Façade Improvement Loan</td>
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<td>Old East Village (2005)</td>
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<td>SoHo (2011)</td>
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<td>Lambeth (2019 pending)</td>
<td>Façade Improvement Loan</td>
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Each financial incentive program will have at least one new measure to help determine its success. The measures that are being considered relate to the objective of the financial incentive program itself, but also the vision, goals, and objectives of the CIPs. As the objectives of each financial incentive program are related, the number and types of measures overlap between the programs to help determine if the area is improving as a whole.

Finally, the measures are designed that they can be measured on a regular basis in a consistent fashion. In some cases, the program or mechanism for how to measure needs to be created and implemented.
4.0 Façade Improvement Loan

4.1 Program Description
The Façade Improvement Loan is a 0% interest 10-year loan to cover 50% of the cost of the eligible façade works to a maximum of $50,000. The loan repayments begin six months after the advancement of funds issued after the work has been completed. The loan repayment is on a monthly basis. Full repayment can be made at any time without penalty.

4.2 Availability
The Façade Improvement Loan program has been available in the Downtown since 1986, Old East Village since 2006, SoHo since 2013, Hamilton Road Area since 2018, and Lambeth upon adoption of the CIP and its financial incentive program guidelines.

4.3 Purpose
The purpose of the Façade Improvement Loan program is to assist property owners with façade improvements, such as new storefronts, windows, doors, lightning, signage, and brick repair, as well as to bring participating properties into conformity with the City of London Property Standards By-law, if necessary.

4.4 Objectives
The objectives of the Façade Improvement Loan program are to:

- Support the maintenance, improvement and beautification of the exterior appearance of buildings;
- Encourage reinvestment in London that complies with appropriate design guidelines (for example, Downtown Heritage Conservation District or the Old East Village Commercial Corridor Urban Design Manual);
- Help make the area interesting and aesthetically pleasing for residents, patrons, and visitors alike;
- Bring participating properties into conformity with the City of London Property Standards By-law, if necessary.

4.5 Existing Measures
The Municipal Council approved Façade Improvement Loan program guidelines contain numerous measures that are used to monitor the Façade Improvement Loan program including:

- Number of applications approved and denied;
- Commitment value for the loan;
- Total loan amount;
- Total construction cost of the project;
- Total public investment vs. private investment;
- Pre-assessment property value;
- Post-assessment property value;
- Use type (targeted vs. non-targeted);
- Number of forgivable loans;
- Number of loan defaults;

These measures have traditionally been collected to allow Staff to calculate the private investment vs. public investment ratio, manage the day-to-day operations of the loan program, and report out data in the State of the Downtown Report (or other reports) as needed. Beyond calculating the private-public investment ratio, these existing measures have not been used to determine how successful the loan program has been in meeting its purpose and objectives. In other words, measuring progress and uptake, but not performance.

4.6 New Measures and Indicators of Success
Staff are working to develop and implement a façade rating system as a new tool to better determine if this loan program is meeting its purpose and objectives and
ultimately, if the program is being successful in ensuring quality façades and storefronts are being constructed.

A façade rating system will require baseline data and a target to achieve. A preliminary target of 90% of façades rated excellent or good has been suggested, but this number will be refined for each area that offers the Façade Improvement Loan program once the baseline has been established.

Staff are also developing recommended changes to the Façade Improvement Loan program that would be implemented upon reaching the target value of good or excellent façades. These changes could include changing the focus of the loan program (for example, focusing on the façades that are not excellent or good, or on a particular sub-area, or on a particular part or element of the façade).

5.0 Forgivable Façade Improvement Loan

5.1 Program Description
The Forgivable Façade Improvement Loan operates in the same manner as the Façade Improvement Loan; however, the forgivable loan program offers an additional incentive to property owners by forgiving a portion of the loan if the ground floor of the property is occupied by a targeted use. The loan forgiveness occurs as an annual grant based on the loan payments made in a calendar year. The Forgivable Façade Improvement Loan program grants back a maximum of 25% of the annual loan payments.

5.2 Availability
The Forgivable Façade Improvement Loan program has been available in targeted areas of the Downtown from 2008 to 2015 and 2018 to the present, Old East Village from 2008 to 2015 and 2018 to the present, and the Hamilton Road Area since 2018.

5.3 Purpose
Same as section 4.3

5.4 Objectives
Same as section 4.4

5.5 Existing Measures
Same as section 4.5

5.6 New Measures and Indicators of Success
The Forgivable Façade Improvement Loan program will be subject to the new measures and indicators of success of the standard Façade Improvement Loan program as discussed in Section 4.6, but will also have an additional measure focusing on the percentage of building ground floors in the targeted area that are occupied with a targeted use.

Baseline data is needed to determine the percentage of ground floors in the targeted area that are occupied with a targeted use. A preliminary target of 95% of the ground floors in the targeted area occupied with a targeted use has been suggested, but this target will be refined for each area once the baseline data has been collected.

Staff are also developing recommended changes to the Forgivable Façade Improvement Loan program that would be implemented upon reaching the target value of good or excellent façades, as well as the target for targeted uses. These changes could include revising the targeted area to encourage targeted use where they are needed most.

6.0 Upgrade to Building Code Loan

6.1 Program Description
The Upgrade to Building Code Loan is a 0% interest 10-year loan to cover 50% of the cost of the eligible works to a maximum of $200,000. The loan repayments begin six months after the advancement of funds issued after the work has been completed. The
loan repayment is on a monthly basis. Full repayment can be made at any time without penalty.

6.1 Availability
The Upgrade to Building Code Loan program has been available in the Downtown since 1999, Old East Village since 2006, SoHo since 2013, and the Hamilton Road Area since 2018.

6.2 Purpose
The Upgrade to Building Code Loan Program is intended to assist property owners with the financing of building improvements that are often necessary to ensure older buildings comply with current Building Code Requirements. The costs associated with these improvements frequently pose a major issue for building owners wanting to upgrade their properties. This issue is amplified in neighbourhoods where much of the building stock is older and needs major rehabilitation.

6.3 Objectives
The objectives of the Upgrade to Building Code Loan program are to:

- Support the maintenance, improvement, beautification, and viability of the historic building stock in older commercial neighbourhoods in London;
- Encourage the development of residential units in older buildings through conversion and adaptive re-use;
- Support the development of distinctive, interesting and attractive commercial spaces in existing buildings to assist in the regeneration of older neighbourhoods;
- Help ensure that buildings are safe for residents, patrons, and visitors alike by meeting Ontario Building Code and Fire Code regulations;
- Bring participating buildings and properties into conformity with the City of London Property Standards By-law, if necessary.

6.4 Existing Measures
The Municipal Council approved Upgrade to Building Code Loan program guidelines contain numerous measures that are used to monitor the Upgrade to Building Code Loan program including:

- Number of applications approved and denied;
- Commitment value for the loan;
- Total loan amount;
- Total construction cost of the project;
- Total public investment vs. private investment;
- Pre-assessment property value;
- Post-assessment property value;
- Use type (targeted vs. non-targeted);
- Number of forgivable loans;
- Number of loan defaults;

These measures have traditionally been collected to allow Staff to calculate the private investment vs. public investment ratio, manage the day-to-day operations of the loan program, and report out data in the State of the Downtown Report (or other reports) as needed. Beyond calculating the private-public investment ratio, these existing measures have not been used to determine how successful the loan program has been in meeting its purpose and objectives.

6.5 New Measures and Indicators of Success
Staff are considering to track the success of this loan program through the number of consecutive years the amount of applications received and their value have been below a to-be-determined threshold. In other words, have new applications stopped being submitted because property owners no longer need to upgrade their buildings or is private demand and investment great enough that City assistance is no longer needed. A potential threshold for future discussion is three successive years of less than two applications per year with a total value of less than $100,000.
Similar to the Façade Improvement Loan program, Staff are developing recommended changes to the Upgrade to Building Code Loan program once the target is met. These changes could include transitioning the program to target specific streets or buildings that have not used the program.

| 7.0 Forgivable Upgrade to Building Code Loan |
| 7.1 Program Description |
The Forgivable Upgrade to Building Code Loan operates in the same manner as the Upgrade to Building Code Loan; however, the forgivable loan program offers an additional incentive to property owners by forgiving a portion of the loan if the ground floor of the property is occupied by a targeted use. The loan forgiveness occurs as an annual grant based on the loan payments made in a calendar year. The Forgivable Upgrade to Building Code Loan program grants back a maximum of 12.5% of the annual loan payments.

| 7.2 Availability |
The Forgivable Façade Improvement Loan program has been available in targeted areas of the Downtown from 2008 to 2015 and 2018 to the present, Old East Village from 2008 to 2015 and 2018 to the present, and the Hamilton Road Area since 2018.

| 7.3 Purpose |
Same as section 6.3

| 7.4 Objectives |
Same as section 6.4

| 7.5 Existing Measures |
Same as section 6.5

| 7.6 New Measures and Indicators of Success |
The Forgivable Upgrade to Building Code Loan program will be subject to the new measures and indicators of success of the standard Upgrade to Building Code loan program as discussed in Section 5.6, but will also have an additional measure focusing on the percentage of building ground floors in the targeted area that are occupied with a targeted use.

Baseline data is needed to determine the percentage of ground floors in the targeted area that are occupied with a targeted use. A preliminary target of 95% of the ground floors in the targeted area occupied with a targeted use has been suggested, but this target will be refined for each area once the baseline data has been collected.

City Staff are also developing recommended changes to the Forgivable Upgrade to Building Code Loan program that would be implemented upon reaching the target for applications received, as well as the target for targeted uses. These changes could include revising the targeted area to encourage targeted use where they are needed most.

| 8.0 Rehabilitation and Redevelopment Tax Grant and Residential Development Charges Grant |
The Rehabilitation and Redevelopment Tax Grant ("Tax Grant") and the Residential Development Charges (DC) Grant have been grouped together because they have a similar purpose and objective, which is revitalizing and creating a vibrant neighbourhood.

| 8.1 Program Descriptions |
The Tax Grant program helps property owner’s transition to a higher tax assessment as a result of property improvements. Through this program, the City provides a ten-year tax grant for an eligible property, with annual grant amounts declining over this ten-year period. The total grant value is based on the increase in municipal taxes resulting from the rehabilitation and/or redevelopment of the property according to the MPAC
assessment. There are three grant levels: (1) rehabilitation of Part IV designated heritage properties, (2) rehabilitation/Renovation of non-designated heritage properties, and (3) redevelopment grant for new buildings developed on vacant or cleared sites.

The Residential DC Grant program helps reduce the cost of developing residential dwelling units by providing a grant equal to a rebate of DCs for residential units constructed. DCs are required to be paid “upfront” at the time the building permit is issued. The Residential DC program grants back a portion of the residential DCs paid by the applicant over an approximately ten-year schedule until 100% of the residential DCs have been repaid to the applicant.

8.2 Availability
The Tax Grant has been available in the Downtown (excluding Richmond Row) since 1996, Old East Village since 2006, and SoHo since 2018. The Residential DC Grant is available in the Downtown (excluding Richmond Row) and Old East Village.

8.3 Purpose
The Tax Grant and Residential DC Grant are intended to provide economic incentive for the rehabilitation and redevelopment of properties, with the end goal of creating an exciting, exceptional, vibrant, and healthy neighbourhood, as well as attracting new residents to Downtown, Old East Village, and SoHo.

8.4 Objectives
The objectives of the two grant programs are to:

- Grow our economy through investing in the city;
- Stimulate and assist private property owners to rehabilitate buildings to ensure long-term viability;
- Encourage the preservation of significant heritage resources;
- Foster a diverse and resilient economy;
- Develop new residential units;
- Promote the intensification and redevelopment within the existing built-up area;
- Encourage the development of residential units in older buildings through conversion and adaptive re-use;
- Strengthen the property assessment base.

8.5 Existing Measures
The Municipal Council approved program guidelines for the grant programs contain numerous measures for monitoring, including:

- Number of applications;
- Pre-assessment value;
- Post-assessment value;
- Total construction value of building permits;
- Number of residential units created;
- Level of grant (for Tax Grant applications);
- Increase in assessed value of participating property;
- Total grant amount.

These measures have traditionally been collected to allow Staff to calculate the value of the grant programs, manage the day-to-day operations of the programs, and report out data in the State of the Downtown Report (or other reports) as needed.

8.6 New Measures and Indicators of Success
For the two grant programs, Staff are looking to take a holistic and community improvement project area wide approach to measuring their success. These new measures and indicators of success will help determine if the neighbourhood is improving and at what point the programs should be “cut back” and reassessed. The new measures and indicators of success for the grant programs will also take into consideration the new measures previously discussed for the loan programs.
The new measures and indicators of success that Staff are considering for the two grant programs include:

- Façade quality / façade rating system;
- Percentage of targeted uses;
- Existing loan program measures (number of applications, amount of loans issued, private vs. public sector investment, etc.);
- Total population;
- Population growth;
- Vacancy rates (ground floor retail, office, and residential);
- Assessment growth;
- Pedestrian counts.

Staff are of the opinion that the above measures and tracking the changes of those measures over time from a baseline to a target would help indicate if the neighbourhood is improving. For example, better quality facades and property owners investing in their buildings, a growing population, a healthy vacancy rates, and more feet on the street would be an indication of a neighbourhood moving towards revitalization.

Staff are still working on baseline data and preliminary targets for each measure. A “stepping down” approach is also being considered, where the two grant programs would have multiple targets and as each successive target is met it would trigger a reduction in the grant funding, a reassessment of the bigger picture, and a sunset clause for when that reduction in funding would occur.

Using the Downtown as an example, targets that have been considered include a total population of 10,000 persons (often cited as the number needed to sustain a full scale grocery store) and a doubling of pedestrian volumes on key streets, such as Dundas Street and Richmond Street.

**Proposed New Measures and Indicators of Success Summary**

The proposed new measures and indicators of success can be summarized as being better at determining if, individually, a financial incentive program is meeting its purpose and objectives, but also, if the neighbourhood, or more technically, the community improvement project area is improving in a manner that supports the vision of the CIP. Working together the existing and new measures will allow for a more robust evaluation of the City’s financial incentive programs on a regular basis. Table 2 summarizes the potential new measures detailed in the previous sections of this report.
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<tr>
<th>Financial Incentive Program</th>
<th>Potential New Measure</th>
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<td>Façade Improvement Loan</td>
<td>• Façade quality / façade rating system</td>
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**Next Steps**

The next steps in developing measures and indicators of success for the financial incentive programs offered through the Downtown, Old East Village, SoHo, Hamilton Road Area, and draft Lambeth CIPs are:

- To refine the measures and indicators of success through discussion with the City staff, BIAs, development community, and others who access the financial incentive programs;
- Develop the methodology and collect the baseline data. A methodology for each measure and indicator of success will be developed to ensure data can be collected consistently in future years;
- Finalize the targets;
- Report back to Planning and Environment Committee (PEC) to amend the Downtown, Old East Village, SoHo, Hamilton Road Area, and draft Lambeth CIPs to include the measures and indicators of success for the financial incentive programs;
- Concurrently begin investigating measures and indicators of success for the Airport Area, Brownfield, Heritage, and Industrial Lands CIPs and report to PEC as needed.

**Conclusion**

This report summarizes the potential new measures and indicators of success for the City's loan and grant programs available through the Downtown, Old East Village, SoHo, Hamilton Road Area, and draft Lambeth CIPs. Staff will continue to gather baseline data for the new measures and establish targets in conjunction with stakeholders. A future report to Planning and Environment Committee will seek to amend the CIPs to adopt the measures and indicators of success.
Note: The opinions contained herein are offered by a person or persons qualified to provide expert opinion. Further detail with respect to qualifications can be obtained from Planning Services.

May 3, 2019
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Appendix A – Previous Reports

August 26, 2013 – Strategic Change in Delivery of Development Charge Exemptions and Incentives Policies – Report to Strategic Priorities and Policy Committee to provide Municipal Council with a recommended change in approach for exempting forms of development in the Development Charges By-law, as well as the use of CIPs to strategically provide for and finance grants for development charges paid related to economic development or area re-development.

March 25, 2014 – Development Charges Grant for Downtown, Old East Village, and SoHo CIP Areas – Report to Planning and Environment Committee to circulate a draft Residential Development Charges Grant Program. Municipal Council referred these program guidelines back to the Civic Administration and they were replaced by the program guidelines circulated at the February 2, 2015 PEC meeting.

February 2, 2015 – Development Charges Grant Program for Downtown and Old East Village CIP Areas – Report to Planning and Environment Committee to circulate the draft program guidelines for the Residential Development Charges grant program for public review and comment.

March 2, 2015 – Development Charges Grant Program for Downtown and Old East Village CIP Areas – Report to Planning and Environment Committee to provide Municipal Council with an update on the circulation of the draft program guidelines for the Residential Development Charges grant program and hold the mandatory public participation meeting.

April 7, 2015 – Evaluation of Community Improvement Plan Incentives – Report to Planning and Environment Committee to direct the Civic Administration to undertake a comprehensive review of the City’s existing CIPs and associated incentives.

May 19, 2015 – Development Charges Grant Program for Downtown and Old East Village CIP Areas – Report to Planning and Environment Committee to complete the administrative process changes with respect to the delivery of Downtown and Old East Village residential DC exemptions through a CIP program.

February 1, 2016 – Evaluation of Community Improvement Plan Incentives – Report to Planning and Environment Committee to provide background on the legislative basis for municipal incentives and the CIPs that allow for such incentives, to describe the financial incentives currently offered by the City, to evaluate each program and recommend potential changes to be considered through a comprehensive CIP Service Review, documents the range of new incentive programs that have been posed that will be considered through the CIP Service Review, and recommends that no additional contributions be made to the incentive funding envelope beyond what has already been budgeted through the 2016-2019 budget submission.

August 22, 2016 – Public Engagement Process for the Evaluation of Community Improvement Plan Incentives – Report to Planning and Environment Committee to provide an update to Municipal Council on the consultation undertaken to date as part of the CIP Service Review, a description and evaluation of the current CIPs and programs, and a description and preliminary evaluation of the potential new CIPs and programs that have been proposed to Municipal Council for consideration.

April 27, 2017 – Service Review of Community Improvement Plan Incentives – Report to Planning and Environment Committee to update Municipal Council regarding the evaluation of current CIP programs and the results of the consultation process. This report concludes the CIP Service Review. This report also provides recommendations for Municipal Council’s consideration on the range of financial incentives offered through the City’s CIP programs, and recommended changes to those programs. The report also identifies next steps, including budgeting for both the revised and future programs, and subsequent amendments to the City’s CIPs.